

What are Custom forms? – Help Center

 help.fractal.com/hc/en-us/articles/25230165717133-What-are-Custom-forms

Custom forms allow you to organize assets into groups by assigning specific fields or labels to each one. These fields can be created and adjusted according to the user's or project's requirements, providing a more efficient structure for data collection.

Main Features:

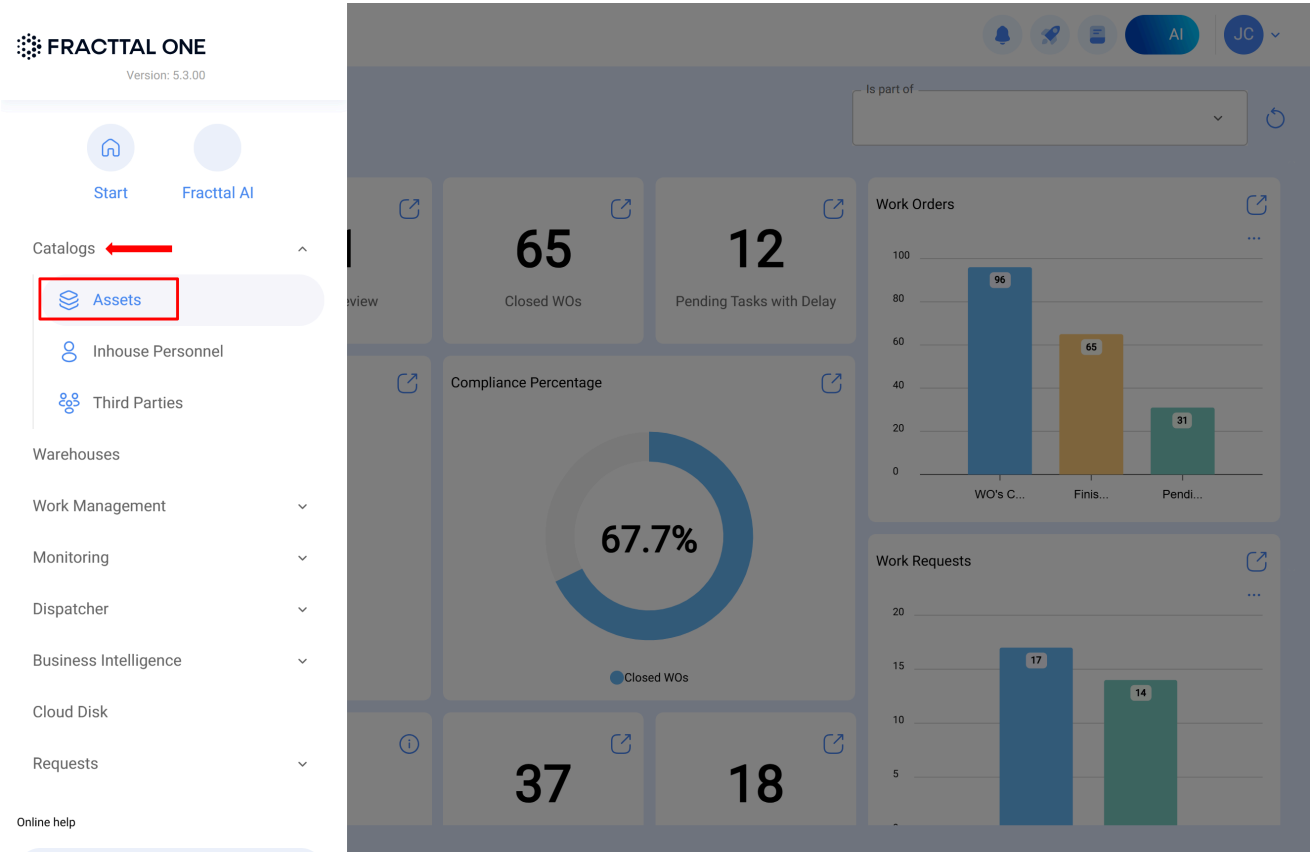
Customizable Fields: customizing fields is crucial to ensure that the collected information is accurate and relevant to the business. Users can define fields tailored to their specific needs, allowing them to gather data that is both specific and useful for each process.

Label Flexibility: custom labels are key for organizing and filtering data effectively. Custom forms allow for flexible label creation and assignment, which improves data search and analysis within the forms.

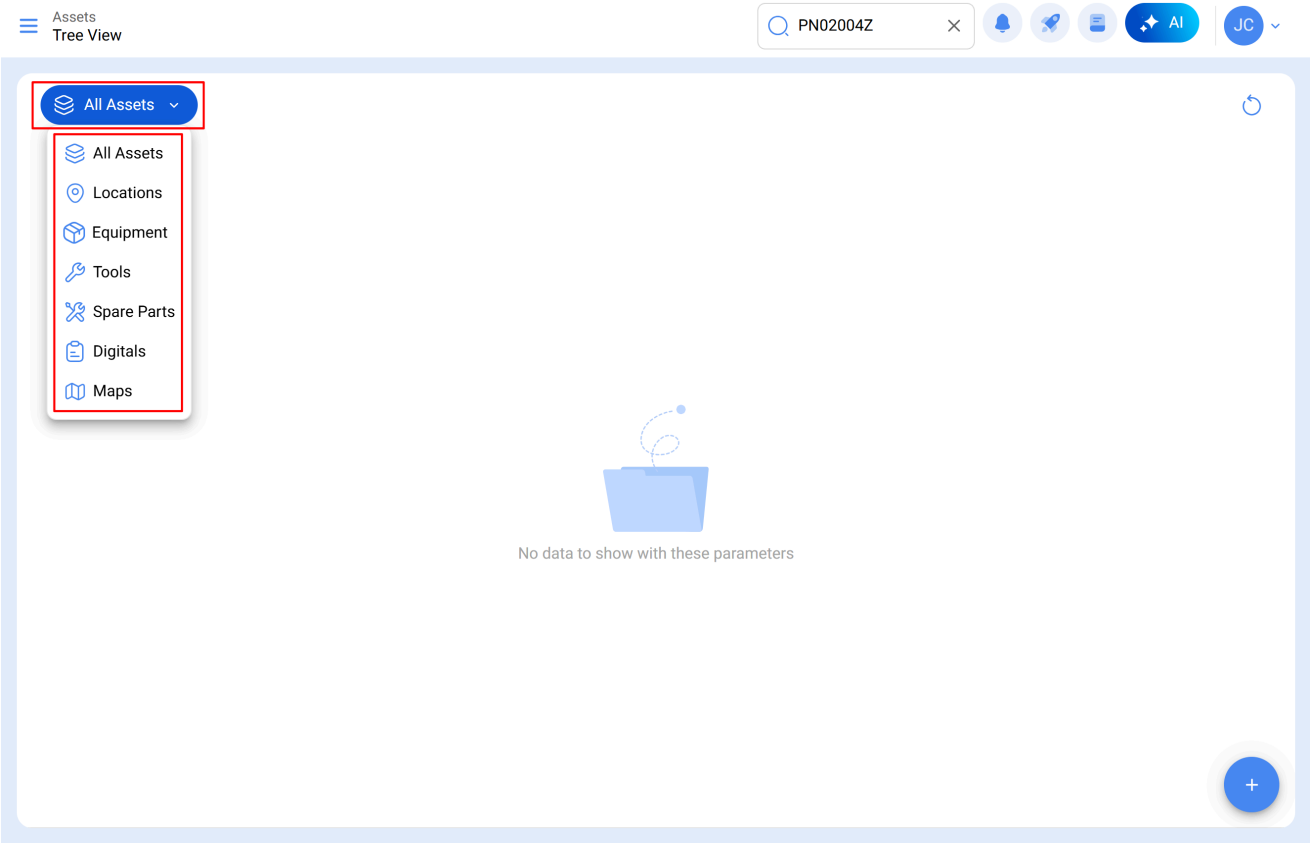
Adaptability to Business Processes: by customizing forms, companies can align the data structure with their specific processes, ensuring consistent data collection and analysis that supports more efficient decision-making.

How to create a custom form for an asset

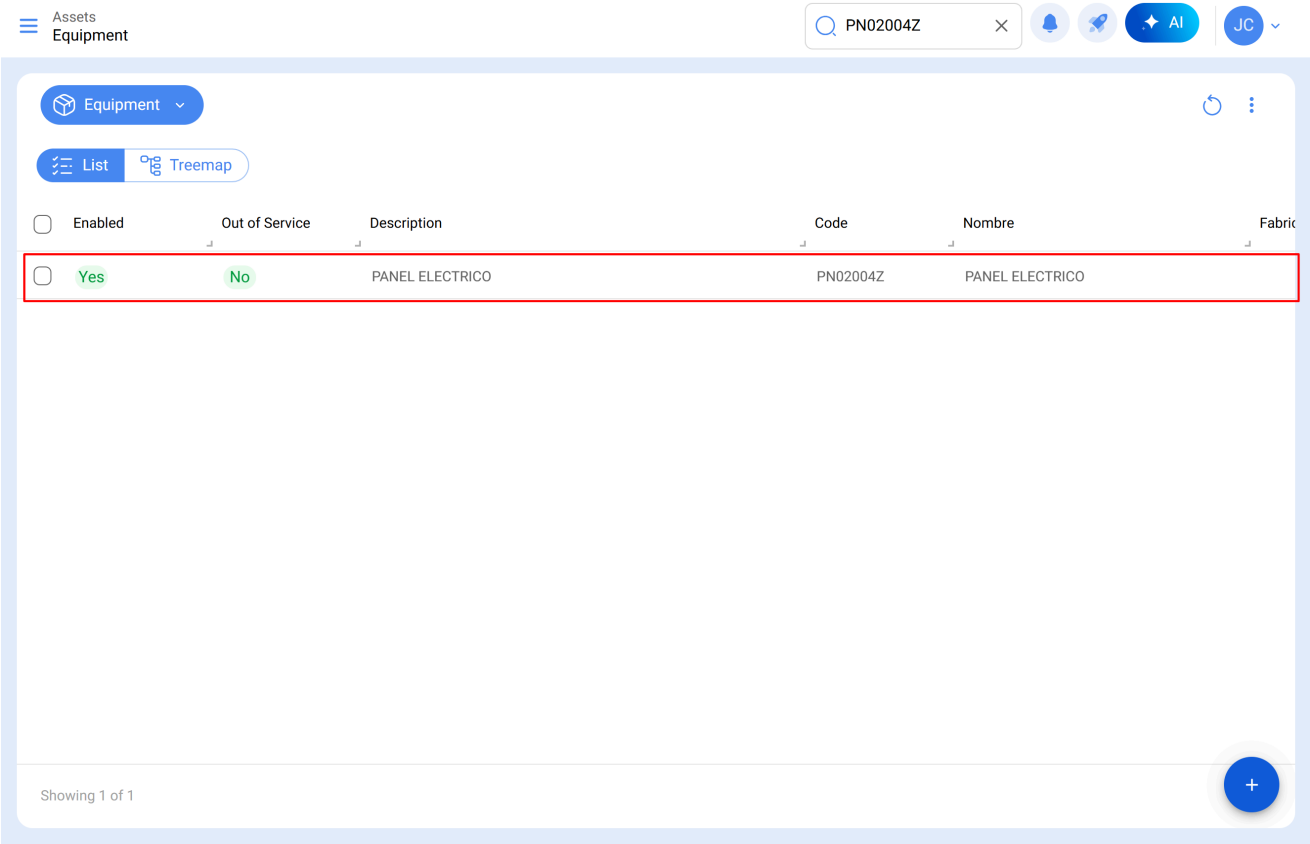
1. In the main menu, select the "Catalogs" module, then click on "Assets".



2. Choose the asset type where you want to establish the custom form.



3. Access the specific asset where you want to configure the custom form.



4. Inside the selected asset, in the left-hand menu, click on **"Custom Form"**.

Assets
Equipment

Panel ELECTRICO

Save

Out of Service: No
Enabled

Information
You have pending changes to save!

General
Custom Form
Health Status
Financial
Third Parties

PANEL ELECTRICO PN02004Z

Fabricante Modelo

NUMERO DE SERIE Otro 1

Otro 2 Barcode Priority

Type Group 1 Group 2

Supplier Purchase date

Hours of average daily use 24:00 ☐ Visible to all

Planned Maintenance

Public QR

5. Click on the rectangle below the **"Custom Form"** title to start configuring the form.

Assets
Equipment

Panel ELECTRICO

Save

Out of Service: No
Enabled

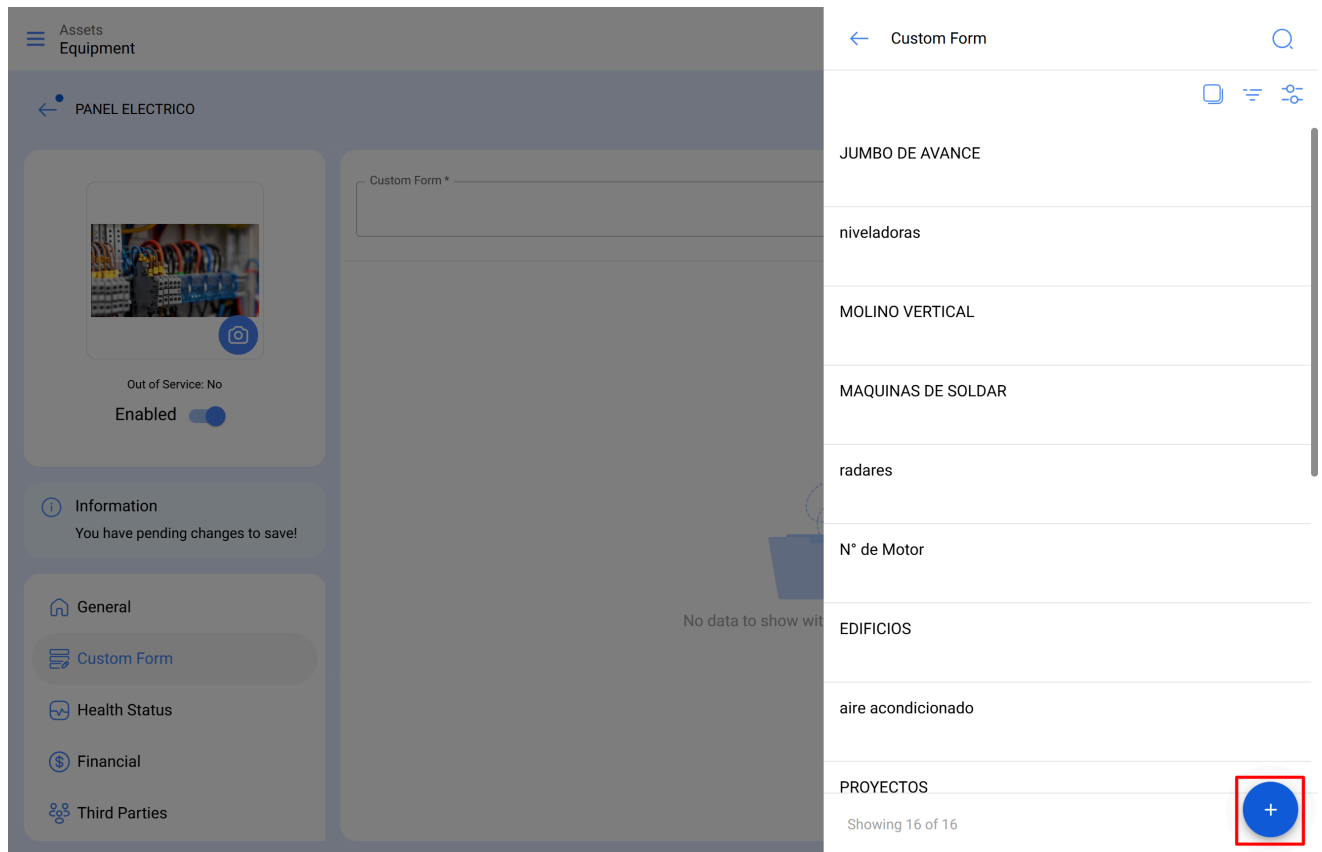
Information
You have pending changes to save!

General
Custom Form
Health Status
Financial
Third Parties

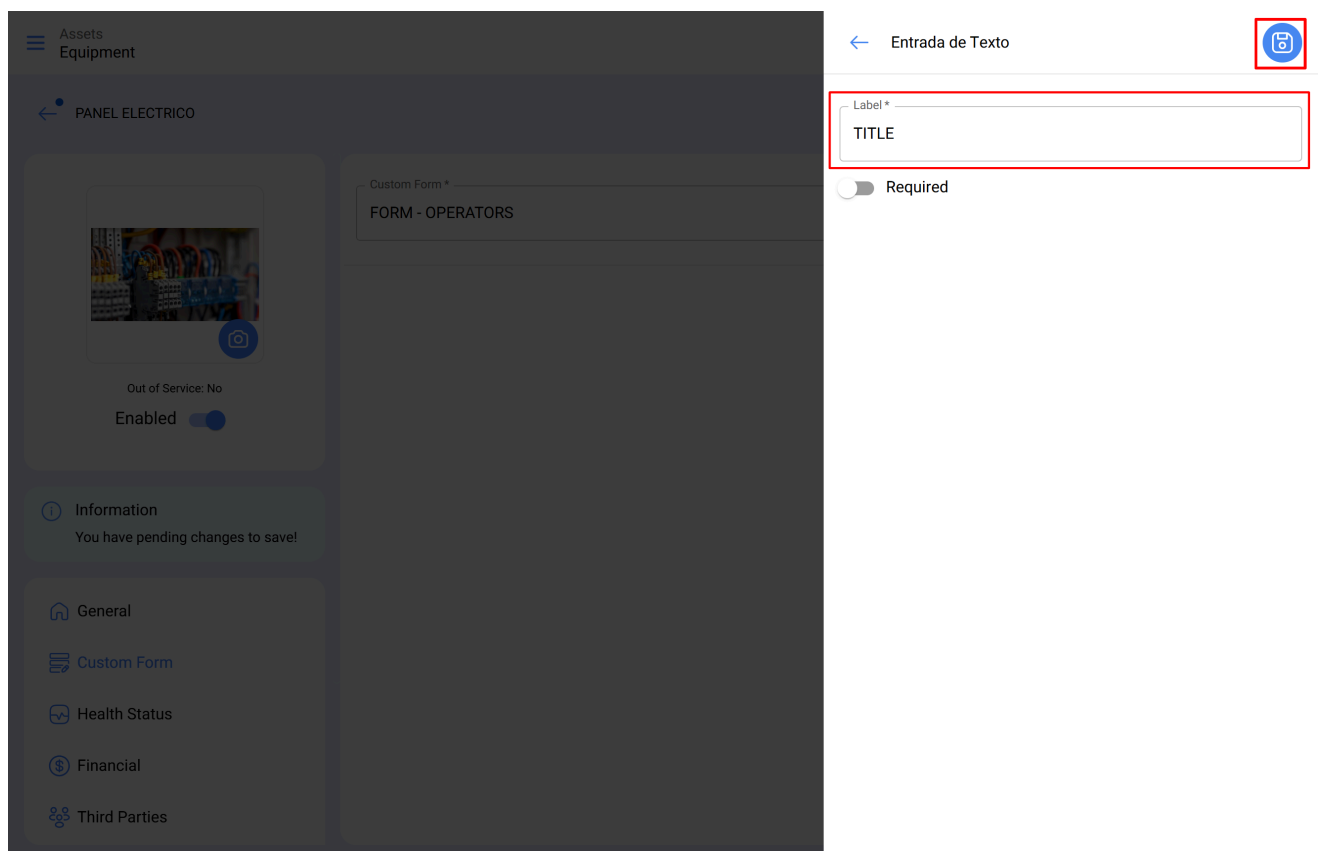
Custom Form *

No data to show with these parameters

6. Click on the "+" button in the bottom-right corner of the box.



7. In the description box, enter a title that reflects the purpose of the form, then click "Save".



8. To edit, click on the **pencil** icon on the created form.

The screenshot shows a web application interface for managing equipment. At the top, there's a header with 'Assets Equipment' and user information 'JC'. Below the header, a navigation bar shows 'PANEL ELECTRICO' with a back arrow and a 'Save' button. The main content area is divided into two panels. The left panel contains a card with an image of an electrical panel, a camera icon, and a toggle switch labeled 'Out of Service: No' and 'Enabled'. Below this card is an 'Information' section stating 'You have pending changes to save!'. Further down is a sidebar with icons for 'General', 'Custom Form' (which is highlighted), 'Health Status', 'Financial', and 'Third Parties'. The right panel displays a 'Custom Form *' titled 'FORM - OPERATORS'. In the top right corner of this form, there is a red square highlighting a pencil icon, indicating the edit function.

9. Click on the "+" symbol in the bottom-right corner of the box to add labels.

This screenshot shows the same interface as the previous one, but with a different focus. The left sidebar and top navigation are identical. The right panel, titled 'FORM - OPERATORS', now displays a large light blue area with a folder icon and the text 'No data to show with these parameters'. In the bottom right corner of this area, a red square highlights a blue circular button with a white plus sign (+), which is used to add new labels or data to the form.

10. Enter a title that represents the data you want to capture in the form, and then click **"Save"**.

Assets
Equipment

← PANEL ELECTRICO

Custom Form *

FORM - OPERATORS

Out of Service: No
Enabled ☒

Information
You have pending changes to save!

General
Custom Form
Health Status
Financial
Third Parties

← Entrada de Texto

Label *
TITLE

☐ Required

Save

11. If you wish to add more fields to the form, repeat the previous step as needed.

12. Finally, click **"Save"** to record the changes made to the form.

Assets
Equipment

Panel ELECTRICO

Out of Service: No
Enabled

Information
You have pending changes to save!

General
Custom Form
Health Status
Financial
Third Parties

Custom Form *
FORM - OPERATORS

TITLE

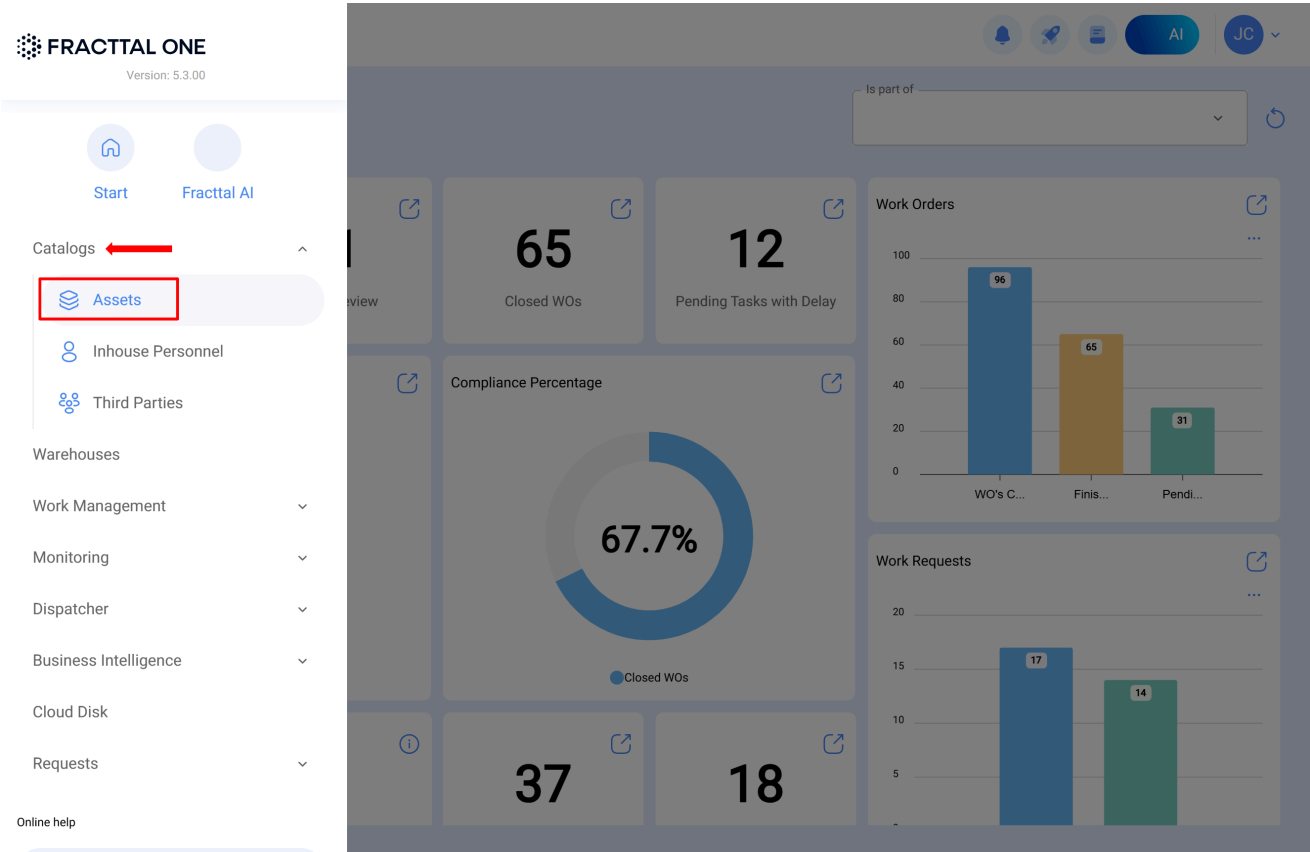
Save

Once these steps are completed, you will have successfully created your custom form and recorded the relevant information.

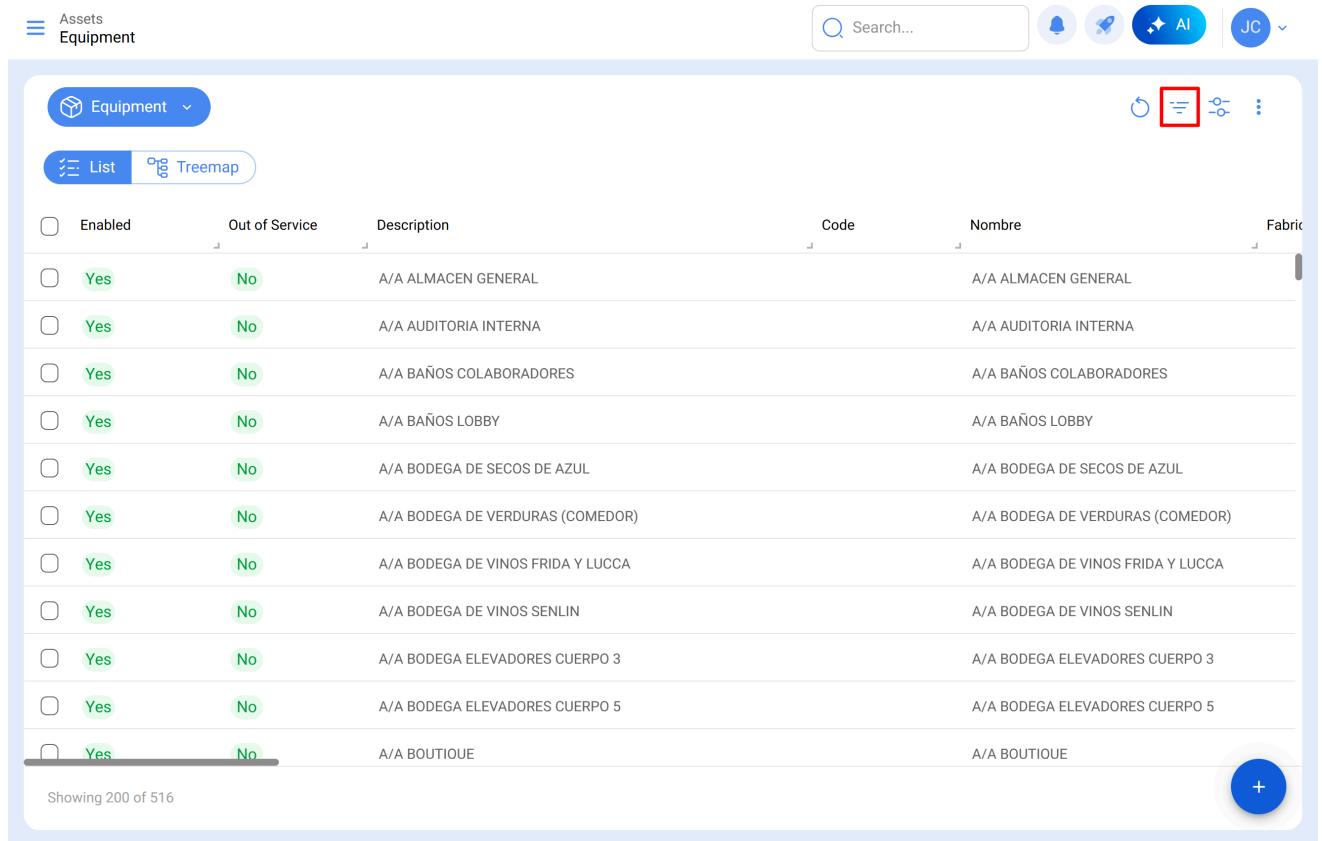
Note: The information recorded in the custom form can be used to filter and extract data as needed.

How to filter an existing custom form

1. In the main menu, select the **"Catalogs"** module, then click on **"Assets"**.



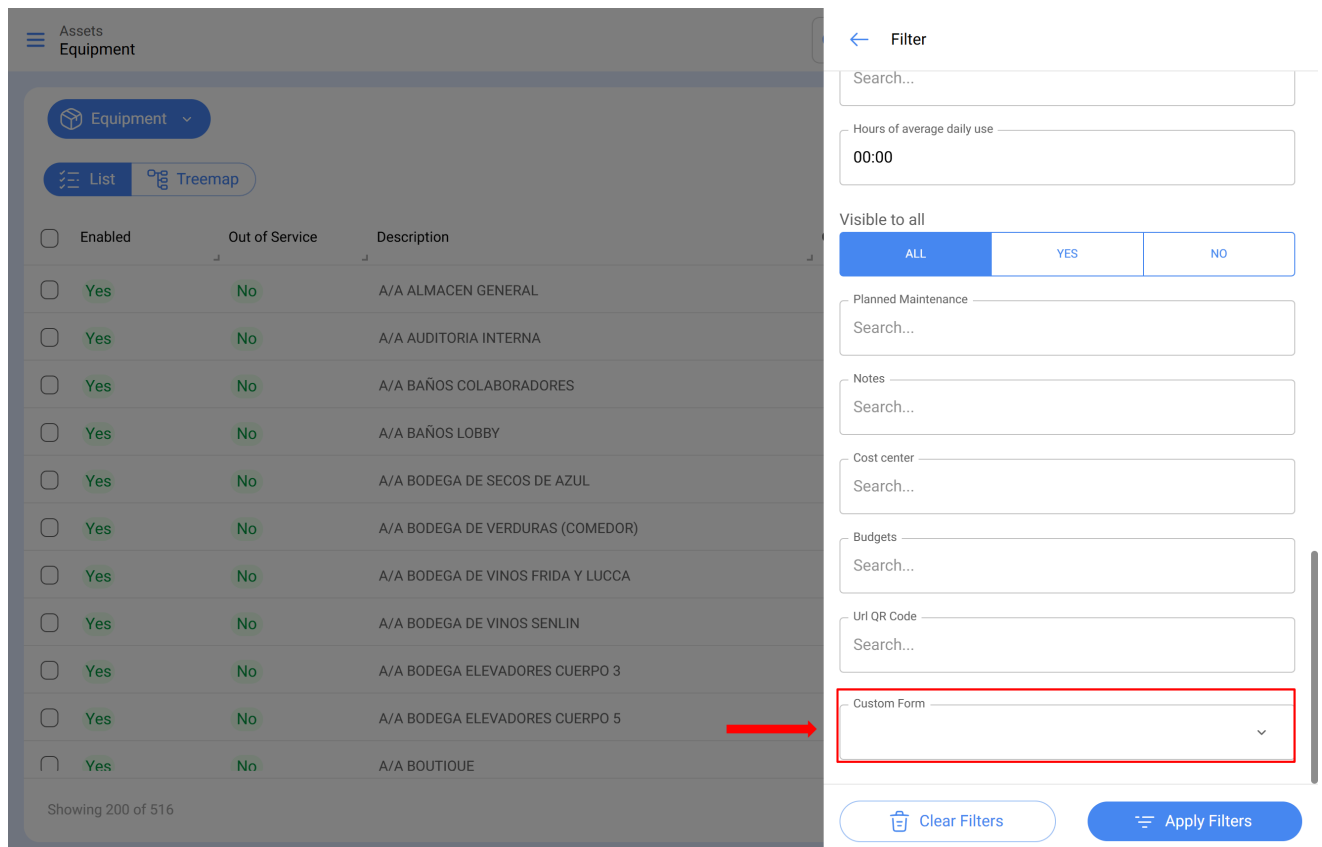
2. Select the **filter** option.



The screenshot shows the 'Assets Equipment' page. At the top right, there is a search bar and several icons. Below the search bar, there is a 'Filter' icon (three horizontal lines) which is highlighted with a red box. The main content area displays a table of equipment items. The table has columns for 'Enabled', 'Out of Service', 'Description', 'Code', 'Nombre', and 'Fabric'. The 'Enabled' column has a dropdown menu with 'Yes' and 'No' options. The 'Out of Service' column has a dropdown menu with 'No' and 'Yes' options. The 'Description' column contains various equipment names. The 'Code' column contains codes. The 'Nombre' column contains names. The 'Fabric' column contains manufacturer names. At the bottom left, it says 'Showing 200 of 516'. At the bottom right, there is a blue circular button with a white plus sign.

Enabled	Out of Service	Description	Code	Nombre	Fabric
<input type="checkbox"/>	No	A/A ALMACEN GENERAL		A/A ALMACEN GENERAL	
<input type="checkbox"/>	No	A/A AUDITORIA INTERNA		A/A AUDITORIA INTERNA	
<input type="checkbox"/>	No	A/A BAÑOS COLABORADORES		A/A BAÑOS COLABORADORES	
<input type="checkbox"/>	No	A/A BAÑOS LOBBY		A/A BAÑOS LOBBY	
<input type="checkbox"/>	No	A/A BODEGA DE SECOS DE AZUL		A/A BODEGA DE SECOS DE AZUL	
<input type="checkbox"/>	No	A/A BODEGA DE VERDURAS (COMEDOR)		A/A BODEGA DE VERDURAS (COMEDOR)	
<input type="checkbox"/>	No	A/A BODEGA DE VINOS FRIDA Y LUCCA		A/A BODEGA DE VINOS FRIDA Y LUCCA	
<input type="checkbox"/>	No	A/A BODEGA DE VINOS SENLIN		A/A BODEGA DE VINOS SENLIN	
<input type="checkbox"/>	No	A/A BODEGA ELEVADORES CUERPO 3		A/A BODEGA ELEVADORES CUERPO 3	
<input type="checkbox"/>	No	A/A BODEGA ELEVADORES CUERPO 5		A/A BODEGA ELEVADORES CUERPO 5	
<input type="checkbox"/>	No	A/A BOUTIQUE		A/A BOUTIQUE	

3. In the filter options, scroll down and check the **"Custom Form"** box.



The screenshot shows the 'Filter' panel on the right side of the Equipment list view. The panel has a 'Search...' field at the top. Below it, there is a 'Hours of average daily use' field with a value of '00:00'. Then, there is a 'Visible to all' section with three buttons: 'ALL', 'YES', and 'NO'. Below that, there is a 'Planned Maintenance' section with a 'Search...' field. Then, there is a 'Notes' section with a 'Search...' field. Below that, there is a 'Cost center' section with a 'Search...' field. Then, there is a 'Budgets' section with a 'Search...' field. Below that, there is a 'Url QR Code' section with a 'Search...' field. At the bottom, there is a 'Custom Form' section with a checkbox that is checked, highlighted with a red box, and a dropdown arrow. At the bottom of the panel, there are two buttons: 'Clear Filters' and 'Apply Filters'.

Showing 200 of 516

4. Search for the name of the custom form you created.

The screenshot shows the 'Custom Form' search interface. On the left, there's a sidebar with 'Assets Equipment' and a search bar. Below it, there's a list of equipment items with columns for 'Enabled', 'Out of Service', and 'Description'. The right panel shows a search results list with various categories like 'EDIFICIOS', 'EXCAVADORAS', 'Generadores', 'JUMBO DE AVANCE', 'MAQUINAS DE SOLDAR', 'MODULOS FV', and 'MOLINO VERTICAL'. The 'FORM - OPERATORS' item is highlighted in a red box.

Enabled	Out of Service	Description	
<input type="checkbox"/>	Yes	No	A/A ALMACEN GENERAL
<input type="checkbox"/>	Yes	No	A/A AUDITORIA INTERNA
<input type="checkbox"/>	Yes	No	A/A BAÑOS COLABORADORES
<input type="checkbox"/>	Yes	No	A/A BAÑOS LOBBY
<input type="checkbox"/>	Yes	No	A/A BODEGA DE SECOS DE AZUL
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VERDURAS (COMEDOR)
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS FRIDA Y LUCCA
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS SENLIN
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 3
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 5
<input type="checkbox"/>	Yes	No	A/A BOUTIQUE

Showing 200 of 516

Custom Form

EDIFICIOS

EXCAVADORAS

FORM - OPERATORS

Generadores

JUMBO DE AVANCE

MAQUINAS DE SOLDAR

MODULOS FV

MOLINO VERTICAL

Showing 17 of 17

5. Click on "Apply Filters" to apply the search.

The screenshot shows the 'Filter' interface. On the left, there's a sidebar with 'Assets Equipment' and a search bar. Below it, there's a list of equipment items with columns for 'Enabled', 'Out of Service', and 'Description'. The right panel shows various filter options like 'Search...', 'Hours of average daily use', 'Visible to all', 'Planned Maintenance', 'Notes', 'Cost center', 'Budgets', 'Url QR Code', and 'Custom Form'. The 'Apply Filters' button is highlighted in a red box.

Enabled	Out of Service	Description	
<input type="checkbox"/>	Yes	No	A/A ALMACEN GENERAL
<input type="checkbox"/>	Yes	No	A/A AUDITORIA INTERNA
<input type="checkbox"/>	Yes	No	A/A BAÑOS COLABORADORES
<input type="checkbox"/>	Yes	No	A/A BAÑOS LOBBY
<input type="checkbox"/>	Yes	No	A/A BODEGA DE SECOS DE AZUL
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VERDURAS (COMEDOR)
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS FRIDA Y LUCCA
<input type="checkbox"/>	Yes	No	A/A BODEGA DE VINOS SENLIN
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 3
<input type="checkbox"/>	Yes	No	A/A BODEGA ELEVADORES CUERPO 5
<input type="checkbox"/>	Yes	No	A/A BOUTIQUE

Showing 200 of 516

Filter

Search...

Hours of average daily use

00:00

Visible to all

ALL YES NO

Planned Maintenance

Search...

Notes

Search...

Cost center

Search...

Budgets

Search...

Url QR Code

Search...

Custom Form

FORM - OPERATORS

Clear Filters

Apply Filters

6. Scroll to the bottom of the interface to view the filtered data based on the set criteria.

Assets
Equipment

Search...

Equipment

Custom Form: FORM - OPERATORS

List

Treemap

<input type="checkbox"/>	Enabled	Out of Service	Description	Code	Nombre	Fabric
<input type="checkbox"/>	Yes	No	PANEL ELECTRICO	PN02004Z	PANEL ELECTRICO	

Showing 1 of 1

+

Assets
Equipment

Search...

Equipment

Custom Form: FORM - OPERATORS

List

Treemap

Cost center	Budgets	Url QR Code	Custom Form	TITLE
		https://app.fractal.com/#inventories.equipments/45142530	FORM - OPERATORS	

Showing 1 of 1

+