

What are Custom forms? – Help Center

 help.fracttal.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:

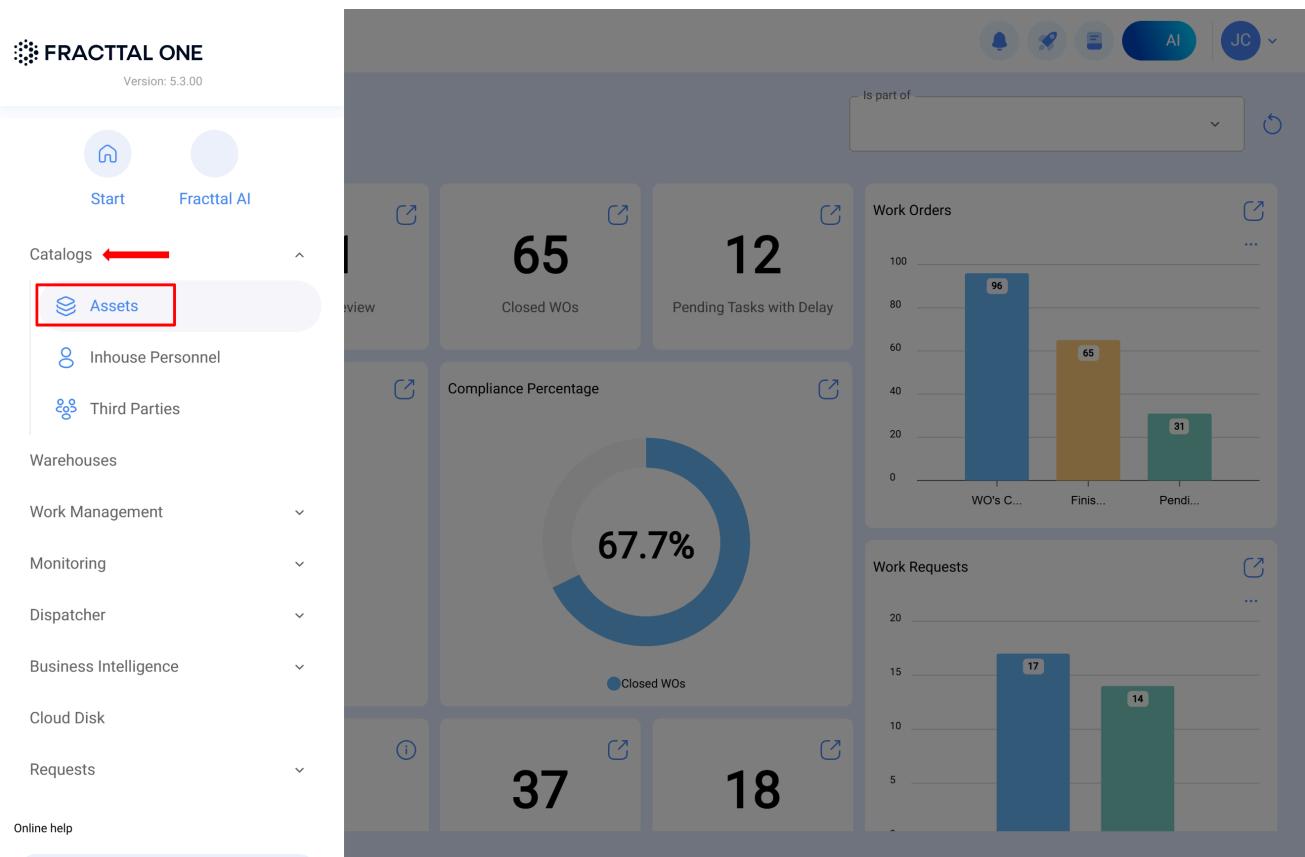
Customizable Fields: customizing fields is crucial to ensure that the collected information is accurate and relevant to the business. Users can define fields tailored to their specific needs, allowing them to gather data that is both specific and useful for each process.

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".



The screenshot shows the Fracttal ONE software interface. On the left, a navigation sidebar is visible with the following structure:

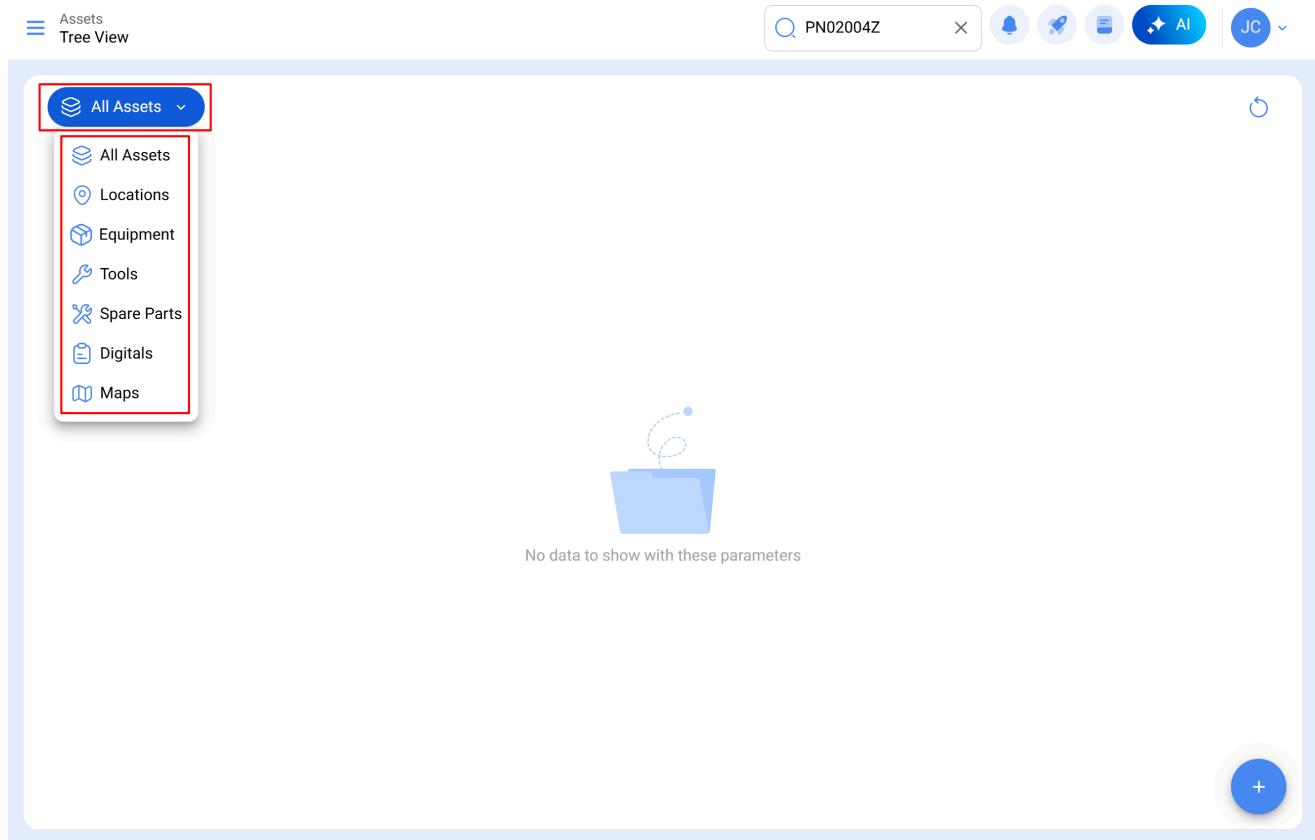
- Start
- Catalogs (highlighted with a red arrow)
- Assets (highlighted with a red box)
- Inhouse Personnel
- Third Parties
- Warehouses
- Work Management
- Monitoring
- Dispatcher
- Business Intelligence
- Cloud Disk
- Requests
- Online help

The main dashboard area contains several data visualizations and metrics:

- Work Orders:** A bar chart showing 96 Closed WOs, 65 Finis..., and 81 Pend... (with a total of 160).
- Work Requests:** A bar chart showing 17 WO's C... and 14 Pend... (with a total of 31).
- Compliance Percentage:** A donut chart showing 67.7% (Closed WOs).
- Summary Metrics:** Three large numbers: 65 (Closed WOs), 12 (Pending Tasks with Delay), and 37 (Work Requests).

At the top right, there are several icons: a bell, a rocket, a document, an AI button (highlighted in blue), and a JC button.

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



Assets Tree View

PN02004Z

All Assets

All Assets

Locations

Equipment

Tools

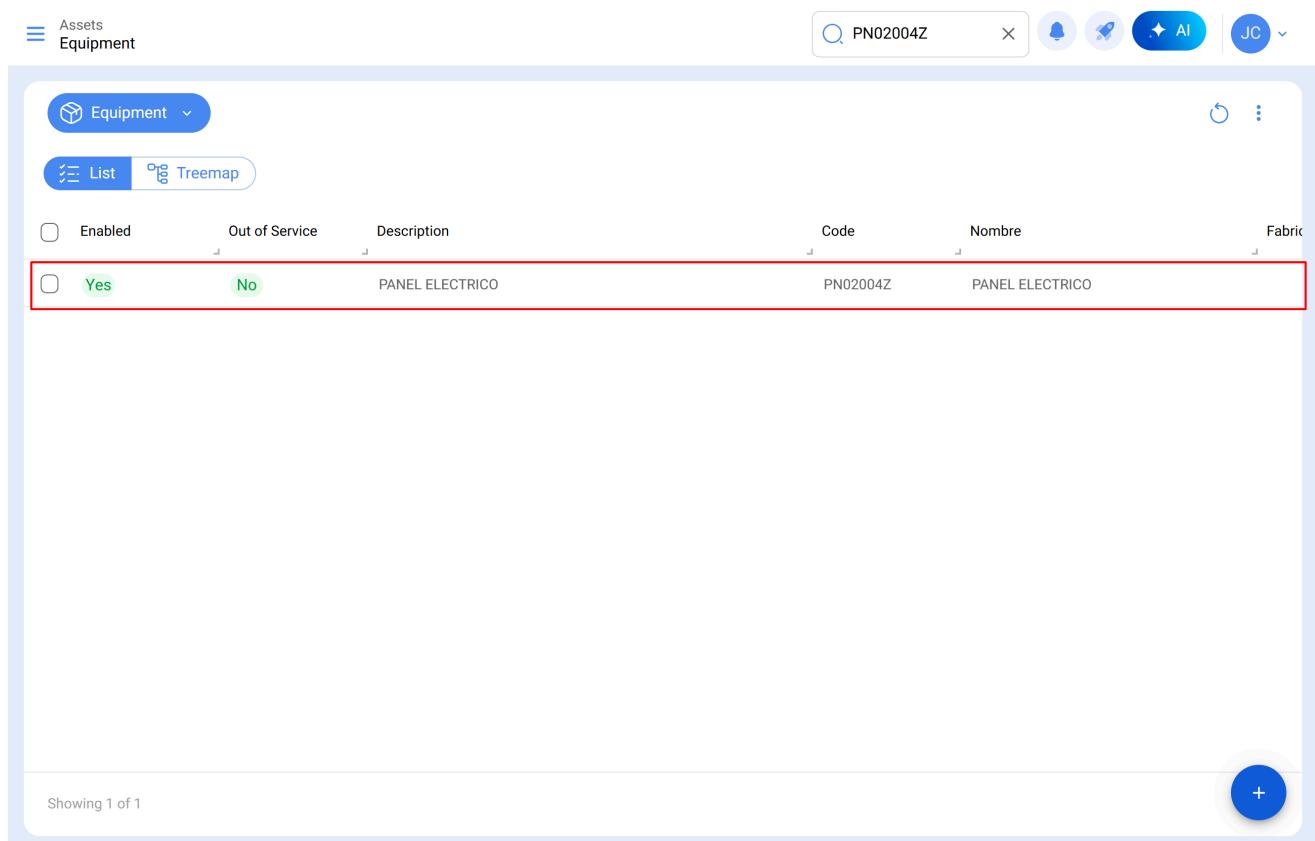
Spare Parts

Digitals

Maps

No data to show with these parameters

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



Assets

Equipment

PN02004Z

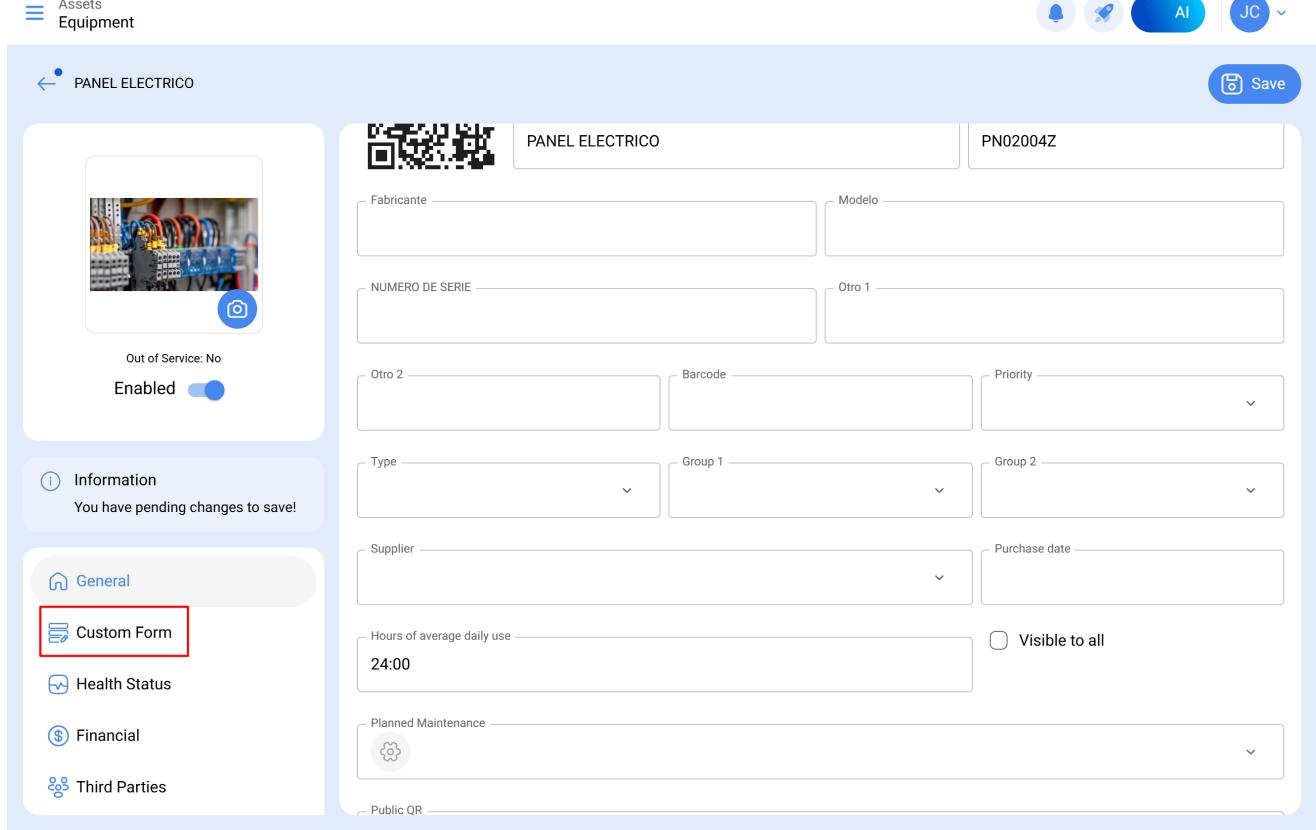
Equipment

List Treemap

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

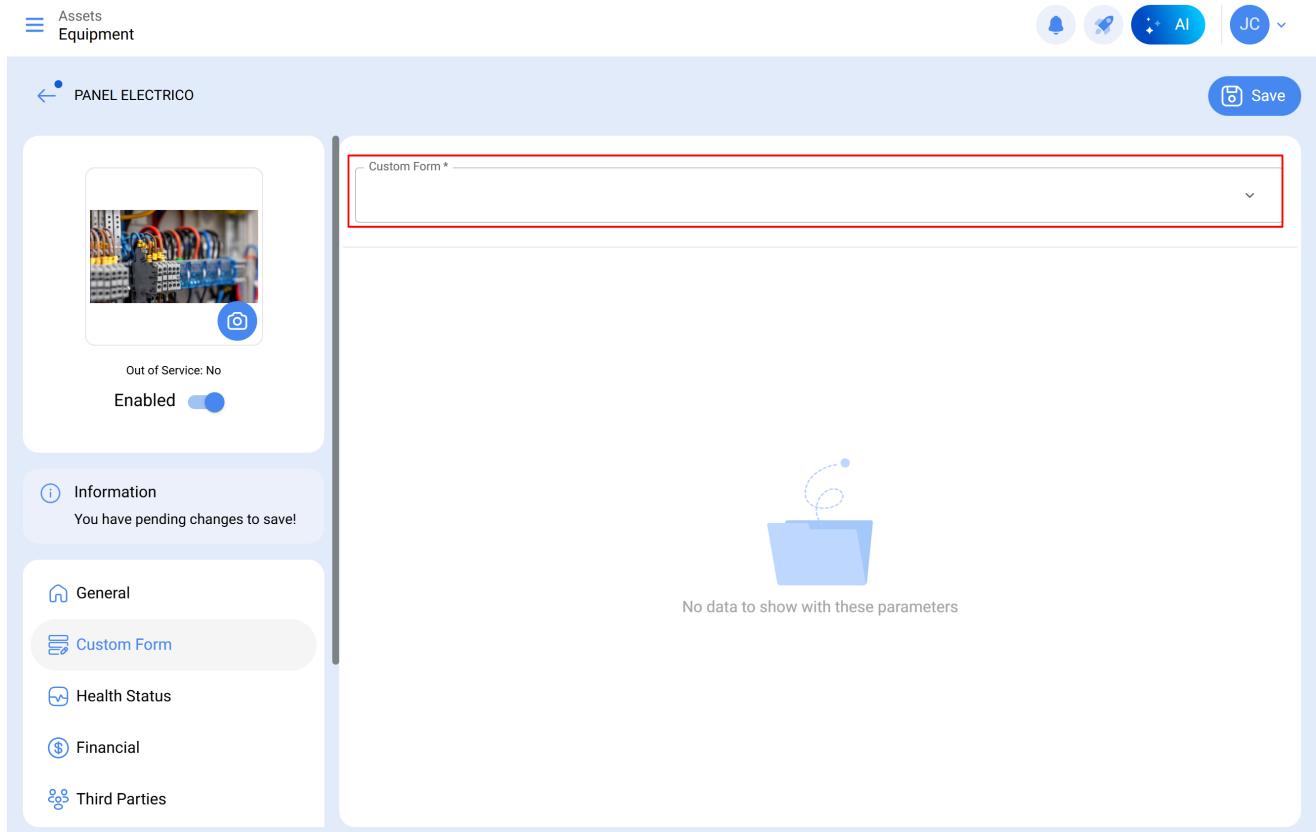
Showing 1 of 1

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



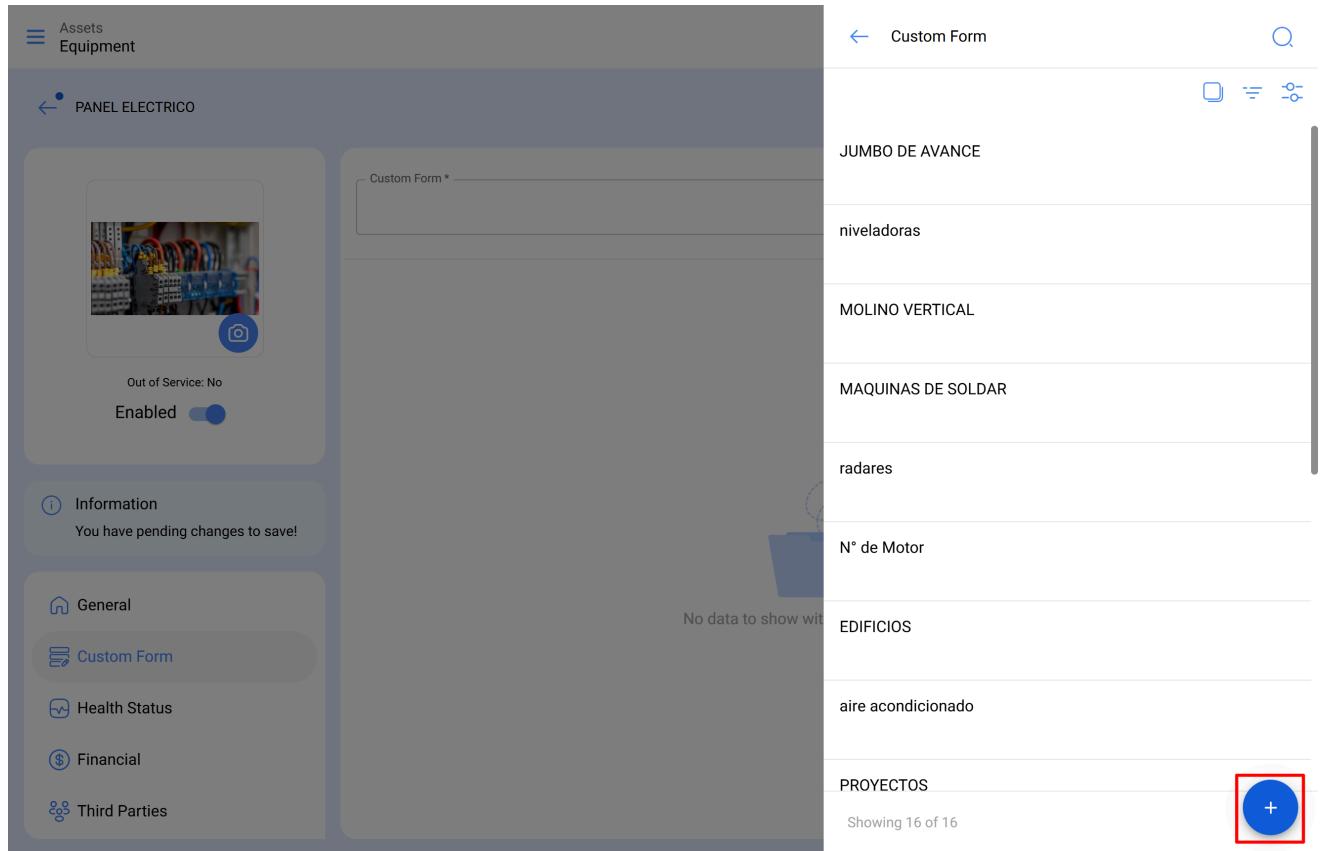
The screenshot shows the 'Assets Equipment' section for a selected asset named 'PANEL ELECTRICO'. The asset image is a photograph of an electrical panel with various wires and components. The 'Enabled' status is set to 'Yes'. The 'Information' section indicates pending changes. The 'Custom Form' tab is selected, highlighted with a red box. The form fields include: 'Fabricante' (Manufacturer), 'Modelo' (Model), 'NUMERO DE SERIE' (Serial Number), 'Otro 1', 'Otro 2', 'Barcode', 'Priority', 'Type', 'Group 1', 'Group 2', 'Supplier', 'Purchase date', 'Hours of average daily use' (set to 24:00), 'Visible to all' (unchecked), 'Planned Maintenance' (with a gear icon), and 'Public QR'. A QR code is displayed above the form fields. The top right corner features a 'Save' button.

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

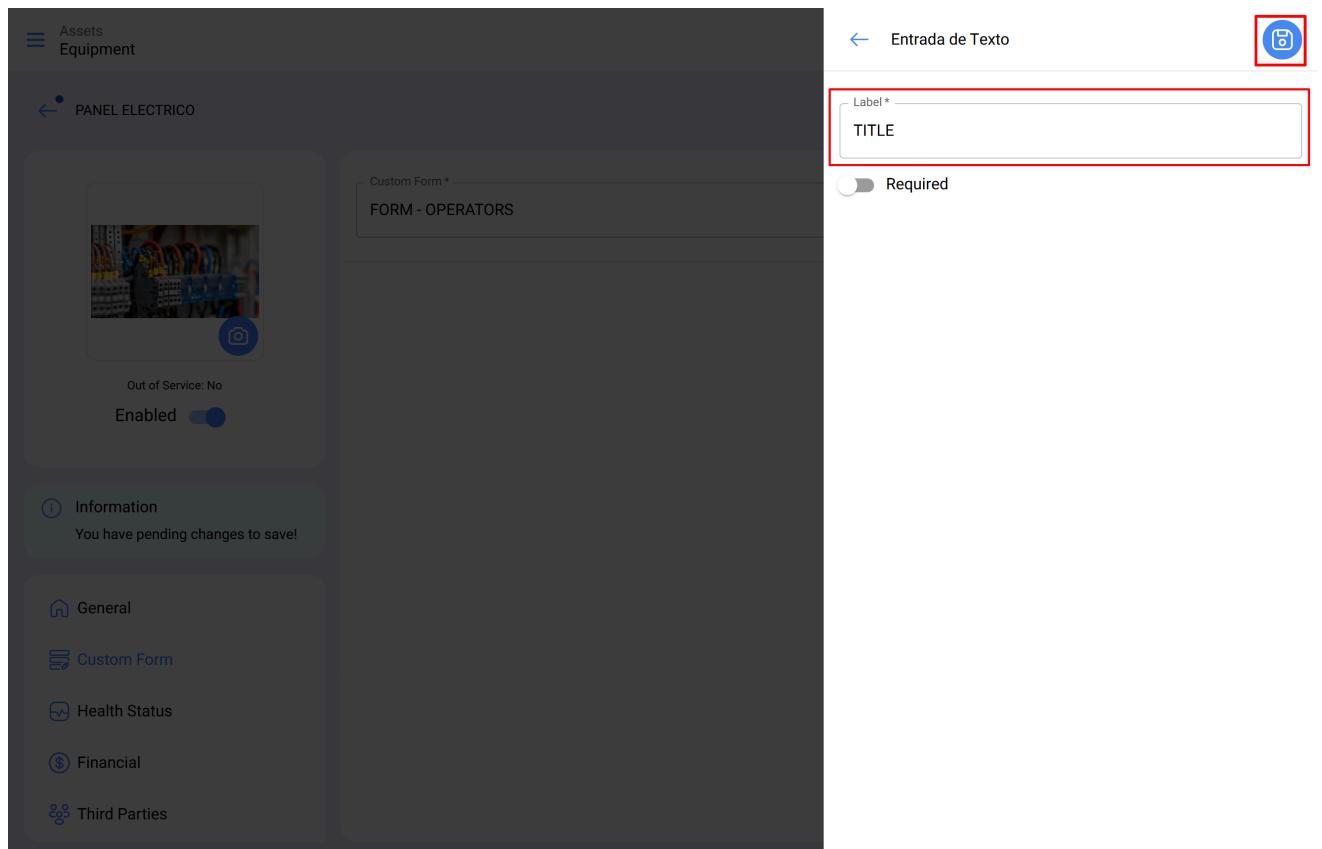


The screenshot shows the 'Assets Equipment' section for the same asset 'PANEL ELECTRICO'. The 'Custom Form' tab is selected. A red box highlights the 'Custom Form*' input field, which is currently empty. Below the field, a message states 'No data to show with these parameters'. The asset image, status, and other sections are identical to the previous screenshot.

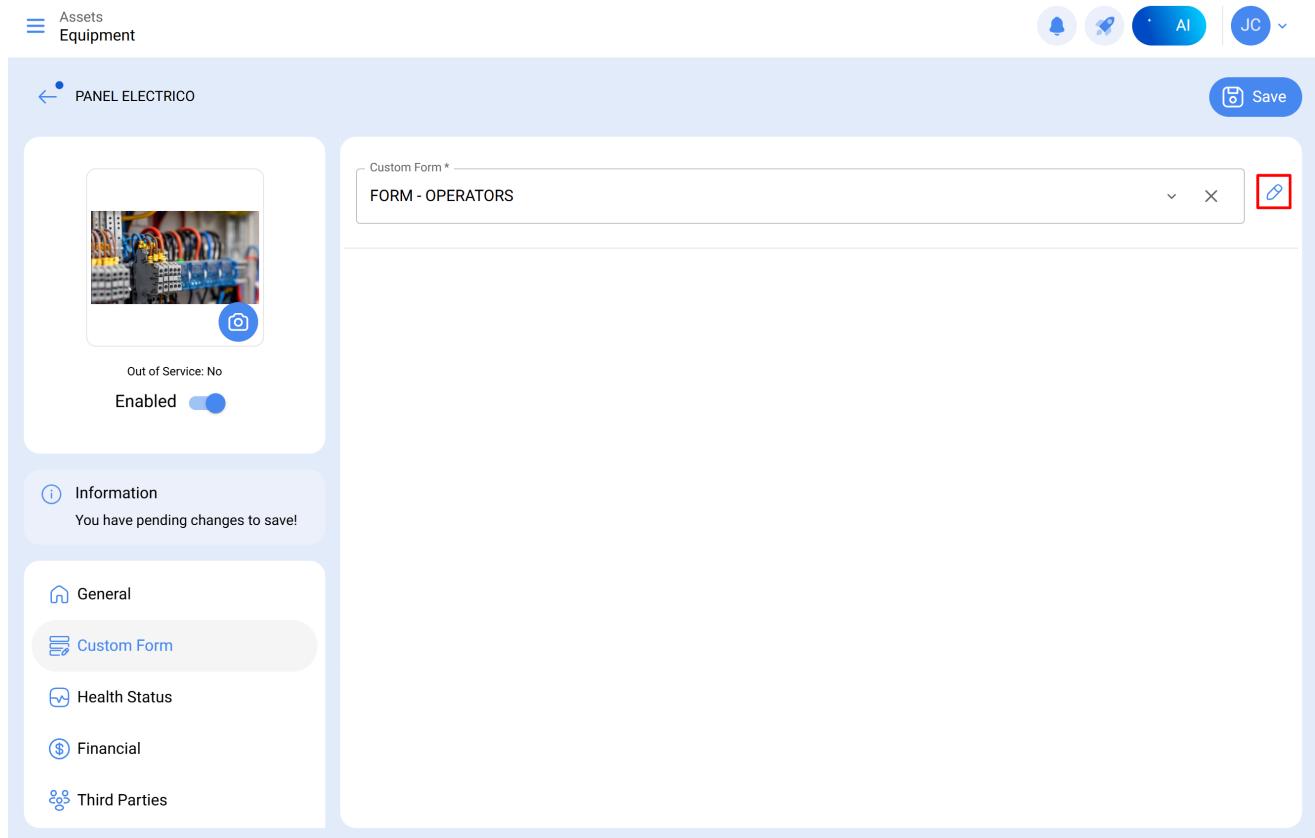
6. Click on the "+" button in the bottom-right corner of the box.



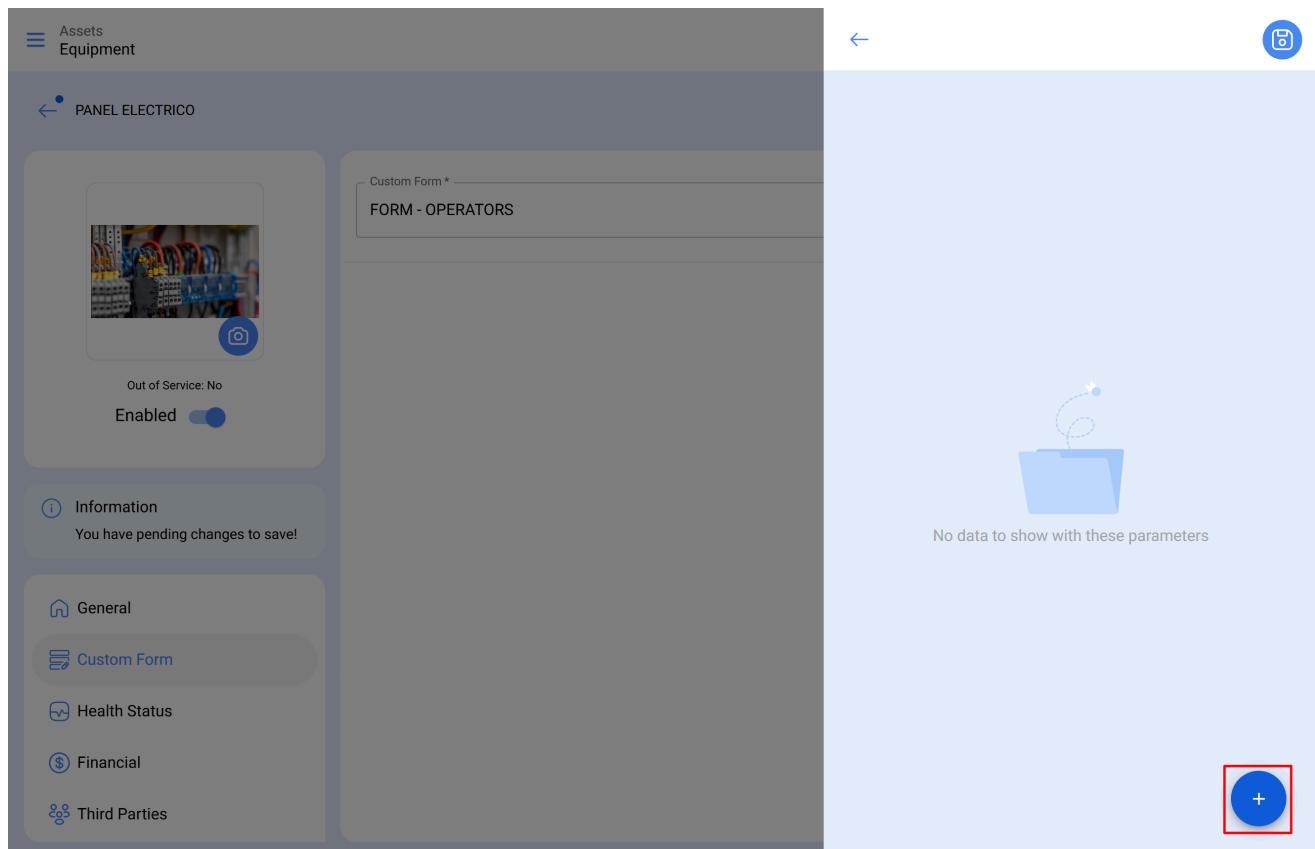
7. In the description box, enter a title that reflects the purpose of the form, then click "Save".



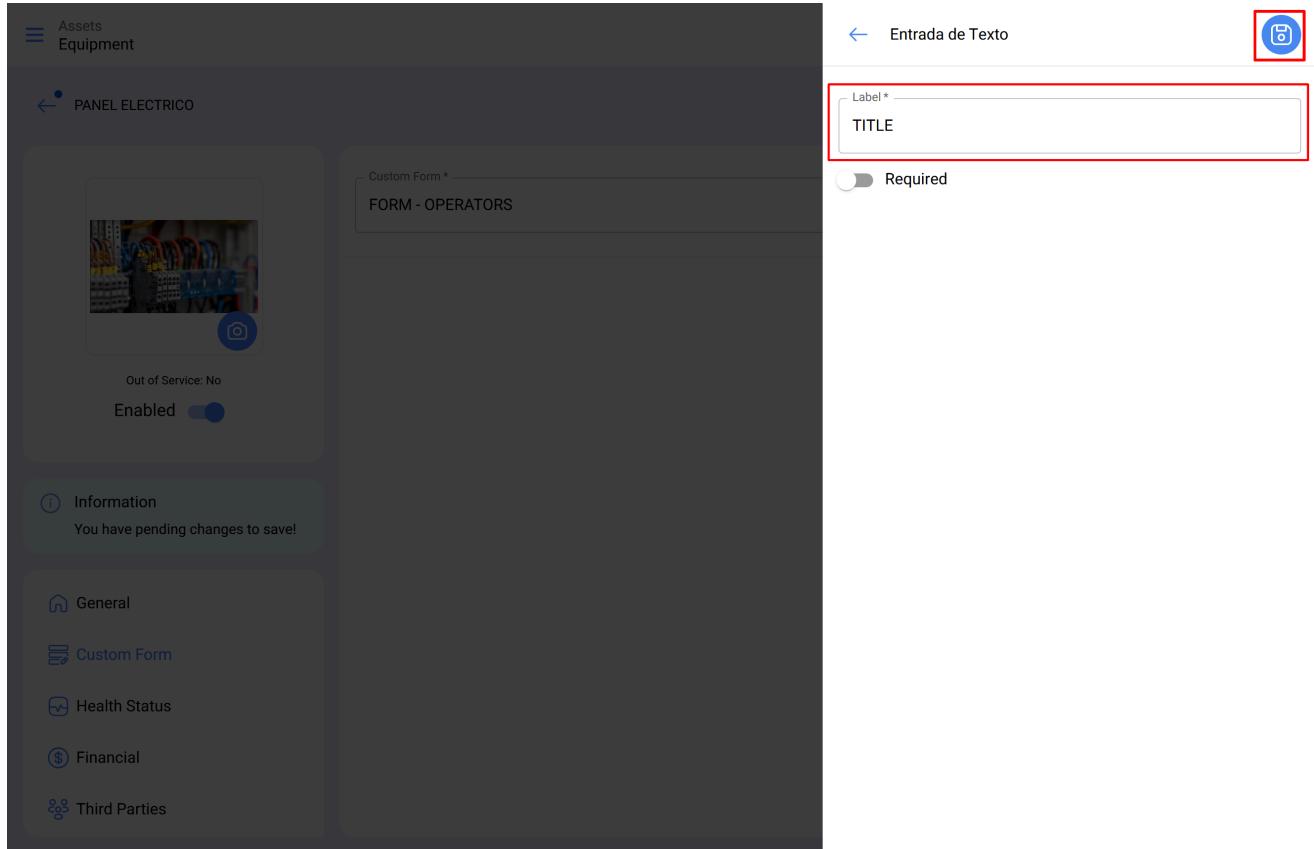
8. To edit, click on the **pencil** icon on the created form.



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



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

Label *

TITLE

Required

Out of Service: No

Enabled

Information

You have pending changes to save!

General

Custom Form

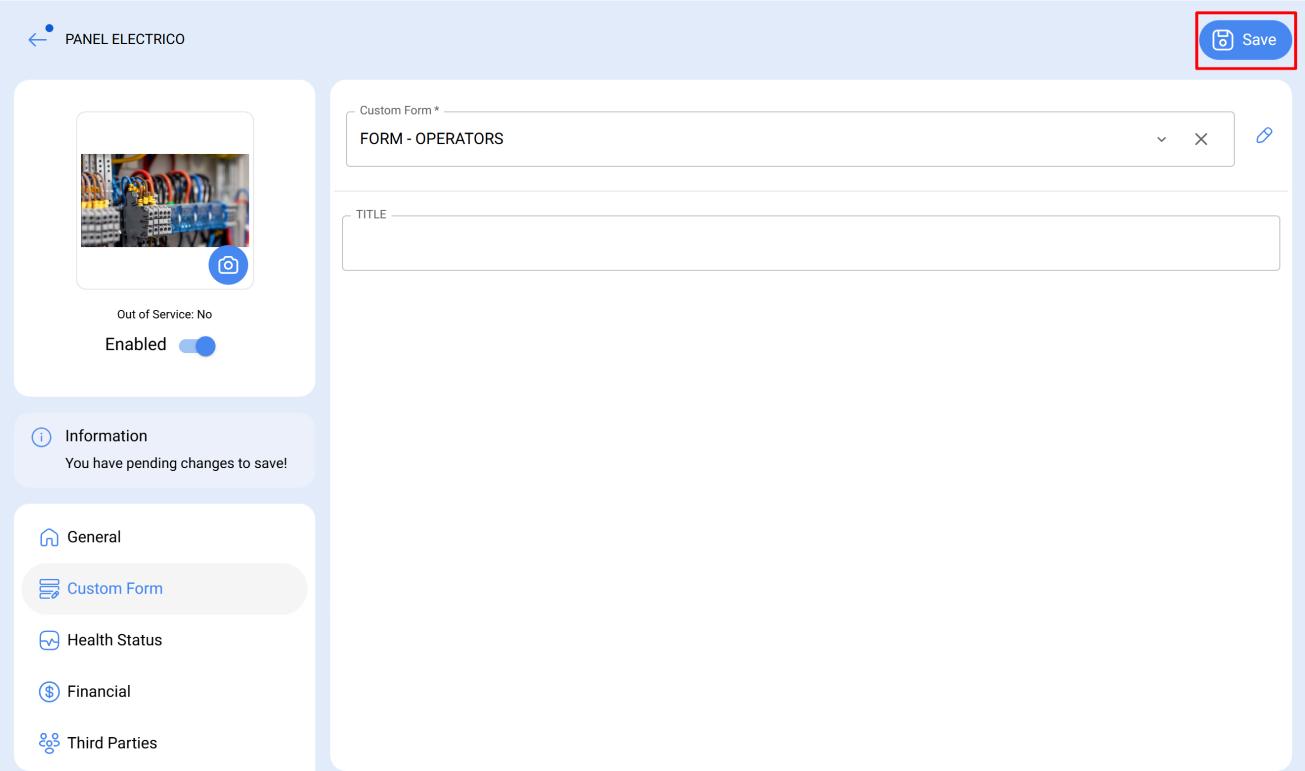
Health Status

Financial

Third Parties

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.



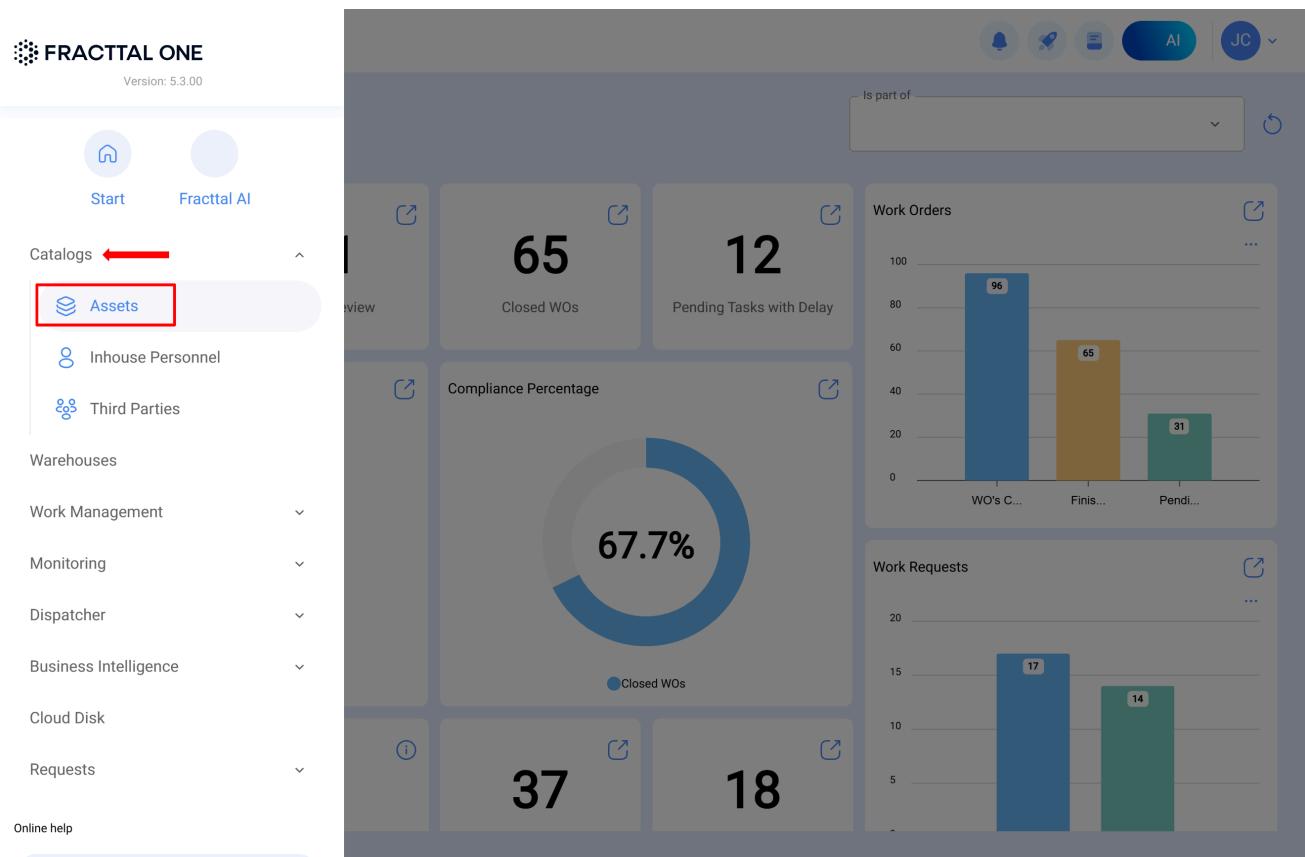
The screenshot shows a software interface for managing assets. At the top, there are navigation icons for 'Assets Equipment', a bell, a rocket, 'AI', and 'JC'. Below the navigation is a breadcrumb trail 'PANEL ELECTRICO' with a back arrow. On the right, there is a 'Save' button with a camera icon, which is highlighted with a red box. The main area is titled 'Custom Form *' and contains the title 'FORM - OPERATORS'. On the left, there is a sidebar with sections for 'Information' (warning: 'You have pending changes to save!'), 'General', 'Custom Form' (which is selected and highlighted with a grey background), 'Health Status', 'Financial', and 'Third Parties'. A camera icon is also present in the sidebar.

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".



The screenshot shows the Fracttal ONE software interface. On the left, a vertical navigation menu is displayed with the following items:

- Start
- Fracttal AI
- Catalogs (highlighted with a red arrow)
- Assets (highlighted with a red box)
- Inhouse Personnel
- Third Parties
- Warehouses
- Work Management
- Monitoring
- Dispatcher
- Business Intelligence
- Cloud Disk
- Requests
- Online help

The main content area features a dashboard with several data visualizations:

- Work Orders:** A bar chart showing 96 Closed WOs, 65 Finis..., and 81 Pend... (with a compliance percentage of 67.7% for Closed WOs).
- Work Requests:** A bar chart showing 17 WO's C... and 14 Pend...
- Compliance Percentage:** A donut chart showing 67.7% for Closed WOs.
- Summary Metrics:** Three large numbers: 65 (Closed WOs), 12 (Pending Tasks with Delay), and 37 (Work Requests).

At the top right, there are several icons: a bell, a rocket, a document, an AI button (highlighted in blue), and a JC button.

2. Select the **filter** option.

Assets Equipment

Search... AI JC

Equipment

List Treemap

Enabled Out of Service Description Code Nombre Fabric

	Yes	No	A/A ALMACEN GENERAL	A/A ALMACEN GENERAL	
	Yes	No	A/A AUDITORIA INTERNA	A/A AUDITORIA INTERNA	
	Yes	No	A/A BAÑOS COLABORADORES	A/A BAÑOS COLABORADORES	
	Yes	No	A/A BAÑOS LOBBY	A/A BAÑOS LOBBY	
	Yes	No	A/A BODEGA DE SECOS DE AZUL	A/A BODEGA DE SECOS DE AZUL	
	Yes	No	A/A BODEGA DE VERDURAS (COMEDOR)	A/A BODEGA DE VERDURAS (COMEDOR)	
	Yes	No	A/A BODEGA DE VINOS FRIDA Y LUCCA	A/A BODEGA DE VINOS FRIDA Y LUCCA	
	Yes	No	A/A BODEGA DE VINOS SENLIN	A/A BODEGA DE VINOS SENLIN	
	Yes	No	A/A BODEGA ELEVADORES CUERPO 3	A/A BODEGA ELEVADORES CUERPO 3	
	Yes	No	A/A BODEGA ELEVADORES CUERPO 5	A/A BODEGA ELEVADORES CUERPO 5	
	Yes	No	A/A BOUTIQUE	A/A BOUTIQUE	

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

Assets
Equipment

Equipment

List Treemap

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

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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

Clear Filters

Apply Filters

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

Custom Form

EDIFICIOS

EXCAVADORAS

FORM - OPERATORS

FORM - OPERATORS

Generadores

JUMBO DE AVANCE

MAQUINAS DE SOLDAR

MODULOS FV

MOLINO VERTICAL

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

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

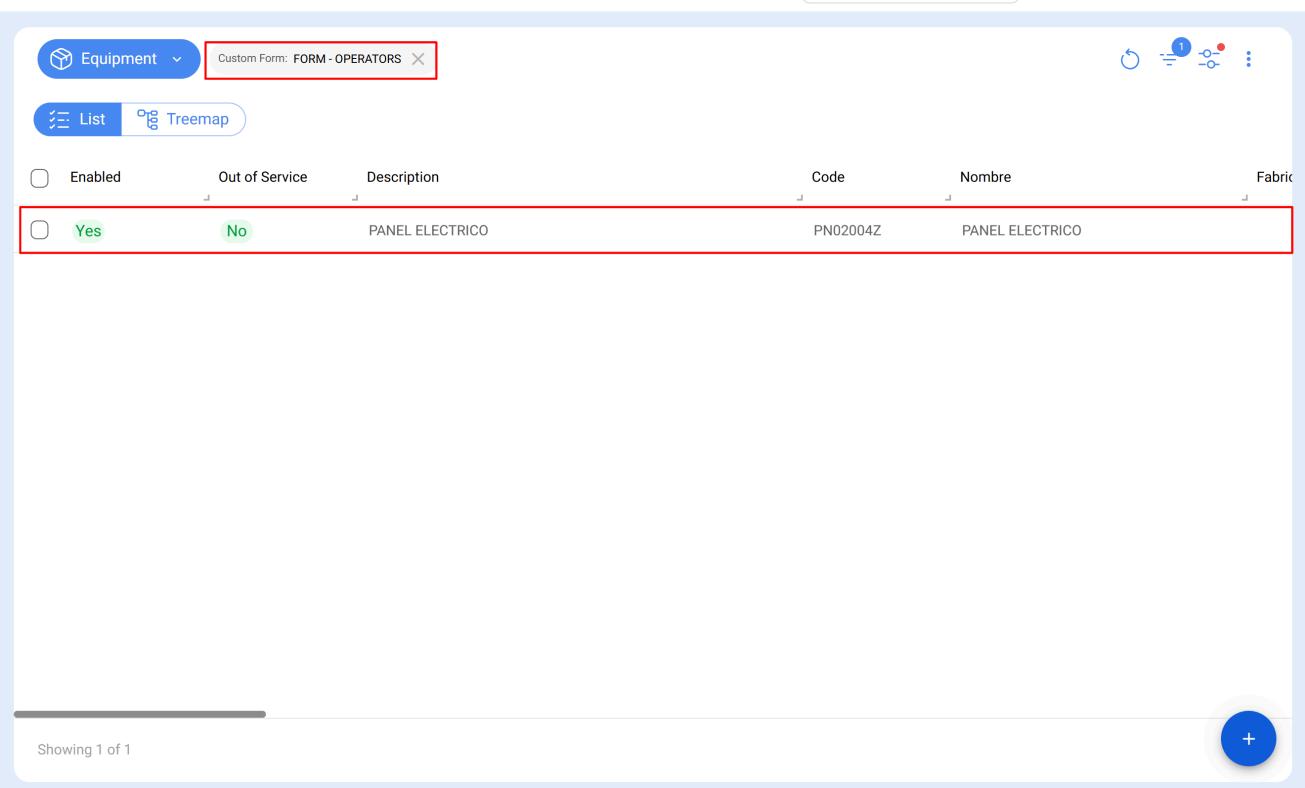
FORM - OPERATORS

Clear Filters

Apply Filters

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



Assets
Equipment

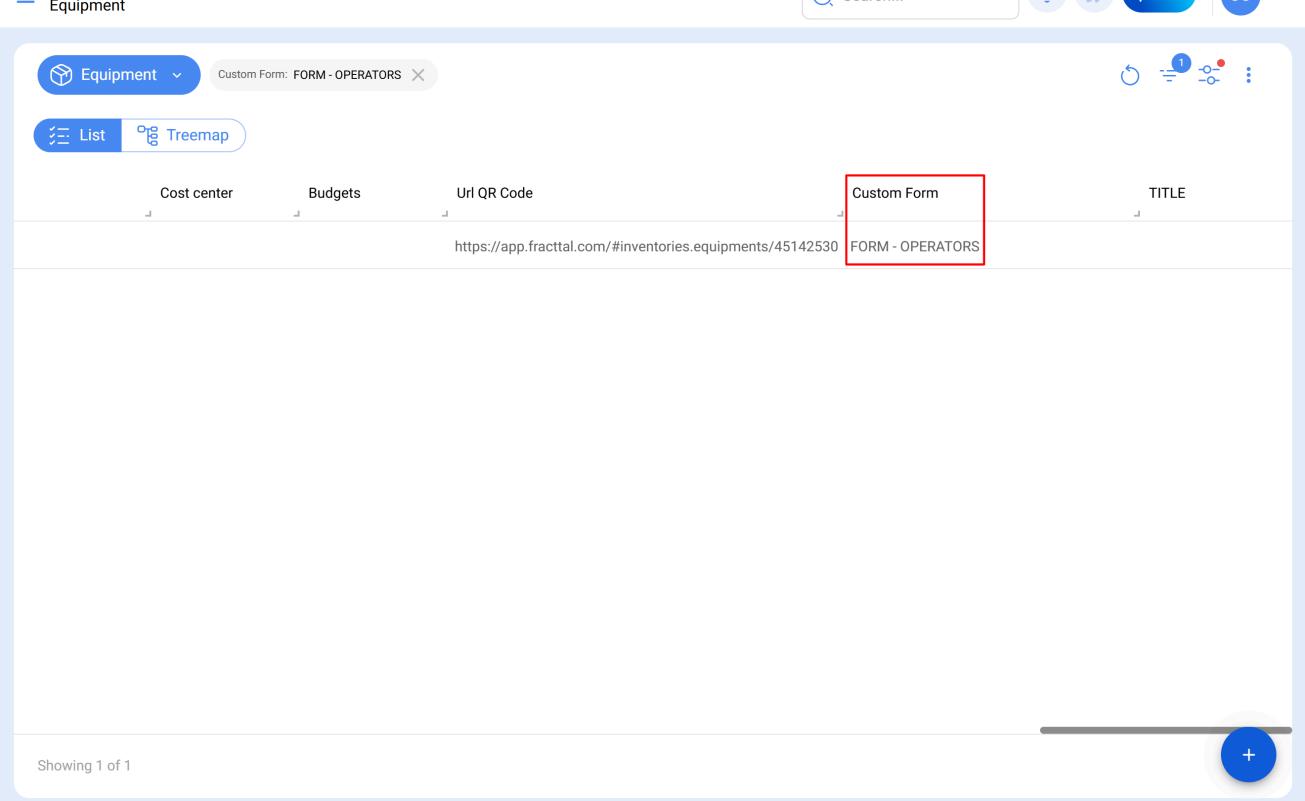
Equipment

Custom Form: FORM - OPERATORS

List Treemap

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

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Assets
Equipment

Equipment

Custom Form: FORM - OPERATORS

List Treemap

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

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