

How to configure the Guest Portal form in Fractal One?

help.fractal.com/hc/en-us/articles/44048909364237-How-to-configure-the-Guest-Portal-form-in-Fractal-One

The **Guest Portal** in Fractal One not only allows external users to report incidents, but also offers the flexibility to customize the request form, adapting it to the specific needs of your organization. Properly configuring this form ensures the collection of accurate and relevant information, thereby optimizing the management of maintenance requests.

Prerequisites:

- Have the **"Guest Portal" add-on** contracted and activated in your Fractal One account.
- Have the necessary permissions to access and modify system settings.

By default, when a request is opened through the Guest Portal, these requests are automatically included in the pending requests queue. However, it is possible to configure the system so that requests are sent directly in the **"Open"** status.

1. Go to the Settings module > Modules and select Work Requests.
2. Enable the option "Allow Guest Portal requests to move to open status."

The screenshot shows the Fractal One Settings interface. On the left is a navigation menu with options: General, User Accounts, Business Calendar, Modules (selected), Financial, Auxiliary Catalogs, Document Management, Transactions Log, Security, API Connections, Guest Portal, Account, and Work Order Prints. The main content area is titled 'Work Requests' and contains a table for configuring mandatory fields and a list of toggle options. The option 'Allow guest portal requests to move to Open status' is highlighted with a red box and is currently disabled.

Options	Required	Options	Required
Attachment	<input type="checkbox"/>	Location	<input type="checkbox"/>
Asset	<input type="checkbox"/>	Group	<input type="checkbox"/>
Comments	<input type="checkbox"/>	Group 1	<input type="checkbox"/>
Requested By	<input type="checkbox"/>	Group 2	<input type="checkbox"/>
Requested email	<input type="checkbox"/>	Keywords	<input type="checkbox"/>
Reference	<input type="checkbox"/>		

Allow work request administrators to edit the advanced information of requests in "Open" status

Allow the creator of the work request to edit advanced information for requests in "Open" status

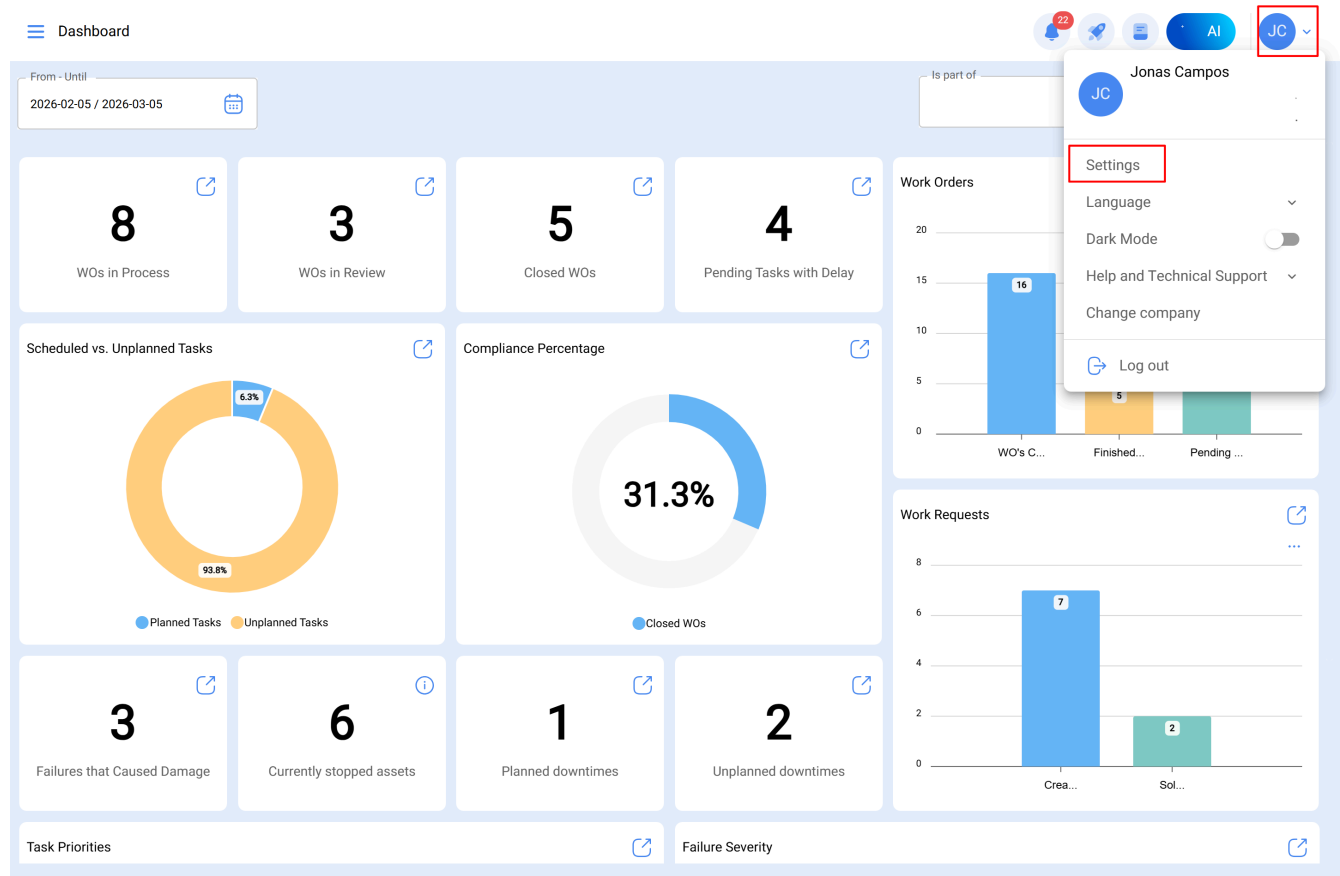
Allow guest portal requests to move to Open status

Step by Step: Form Configuration

The configuration of the Guest Portal form is done through the **settings** menu in Fractal One. This allows you to define both the content and the structure of the fields that external users will fill out.

Access to the Settings Module

1. Within Fractal One, go to the main settings menu and then select the **"Settings"** option.



2. Within settings, navigate to the module called **"Guest Portal"**.

- General
- User Accounts
- Business Calendar
- Modules
- Financial
- Auxiliary Catalogs
- Document Management
- Transactions Log
- Security
- API Connections
- Guest Portal**
- Account
- Work Order Prints

Guest portal settings

Public URL
<https://guestportal.fracttal.com/f9947ea4-d69e-447a-b28a>

Header Text
Fracttal One

Fields

Options	Required	Visible
Nome	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Descrição da solicitação	<input type="checkbox"/>	<input type="checkbox"/>
Descrição do Ativo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Incident date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Viewing the Public URL of the Portal

Once in the module, within the Guest Portal settings tab, you will be able to see the **public URL** assigned to your portal. This link should be shared with external users so they can access and create requests.

Guest portal settings

Public URL
<https://guestportal.fractal.com/f9947ea4-d69e-447a-b28a>

Header Text
Fractal One

Fields

Options	Required	Visible
Nome	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>
Descrição da solicitação	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Descrição do Ativo	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Incident date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Defining the Header Text

In this same settings section, you will find a field to define the text that will appear in the header of the Guest Portal.

Guest portal settings

Public URL
<https://guestportal.fractal.com/f9947ea4-d69e-447a-b28a>

Header Text
Fractal One

Fields

Options	Required	Visible
Nome	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input type="checkbox"/>

Recommendation: Use clear and concise text that describes the purpose of the portal for the user. Example: "**Maintenance Request Portal [Your Company Name]**".

Configuring the Form Fields

This is the central step of the form customization. Here you can **add, edit, and organize** the fields that guests will need to complete.

13 Save

Guest portal settings

Public URL
<https://guestportal.fractal.com/null>

Header Text

Fields

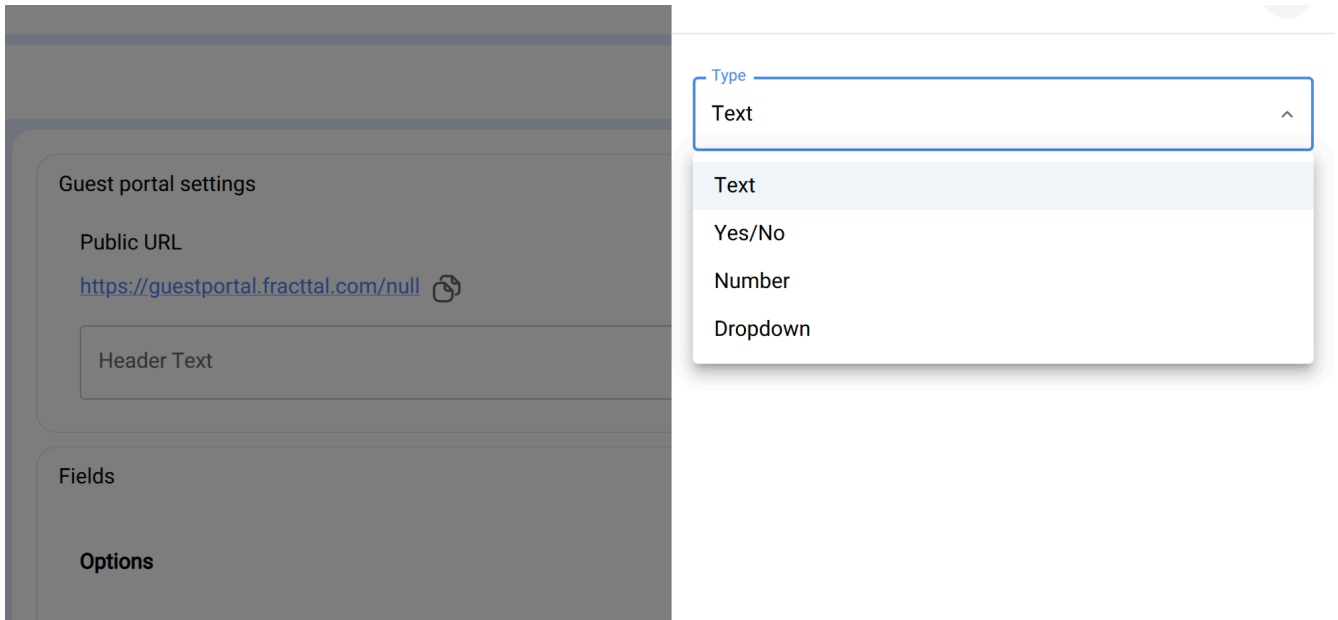
Options	Required	Visible
Customize the comment field of your Fractal work requests		
Comments		+ Add

Fields	Type	Required
Comments	Text	No

Available Field Types:










Fractal One offers several types of fields to suit different information needs:

- **Text:** For free-form responses (e.g., detailed descriptions).
- **Yes/No:** For dichotomous questions requiring a binary answer.
- **Number:** For numeric input (e.g., quantities, codes).
- **List (Dropdown):** Allows the user to select an option from a predefined list (e.g., incident type, preset location).



For each field, it is necessary to define the following:

1. **Field Description:** Enter a clear and precise description of the type of information expected from the user. This description will act as a guide for the guest.
2. **Required/Optional:** Determine if the field is mandatory for submitting the request. Marking a field as required ensures that this key piece of information is always received.
3. **List Options (for "List" type fields):** If you select a "List" type field, you must configure the options the user can choose from.

Options	Required	Visible
Nome 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Email 	<input type="checkbox"/>	<input type="checkbox"/>
Descrição da solicitação 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Descrição do Ativo 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Incident date 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attachments 	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Group 	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Group 1 	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Group 2 	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Once you have defined the header and the form fields according to your requirements, be sure to **save the changes** made in the Guest Portal settings.

After configuring the form, it is highly recommended to:

Requester information

Name

Jonas

Email

email@email.com

Request information

Description *

Review asset request

Description maximum 200 characters allowed

Asset Description

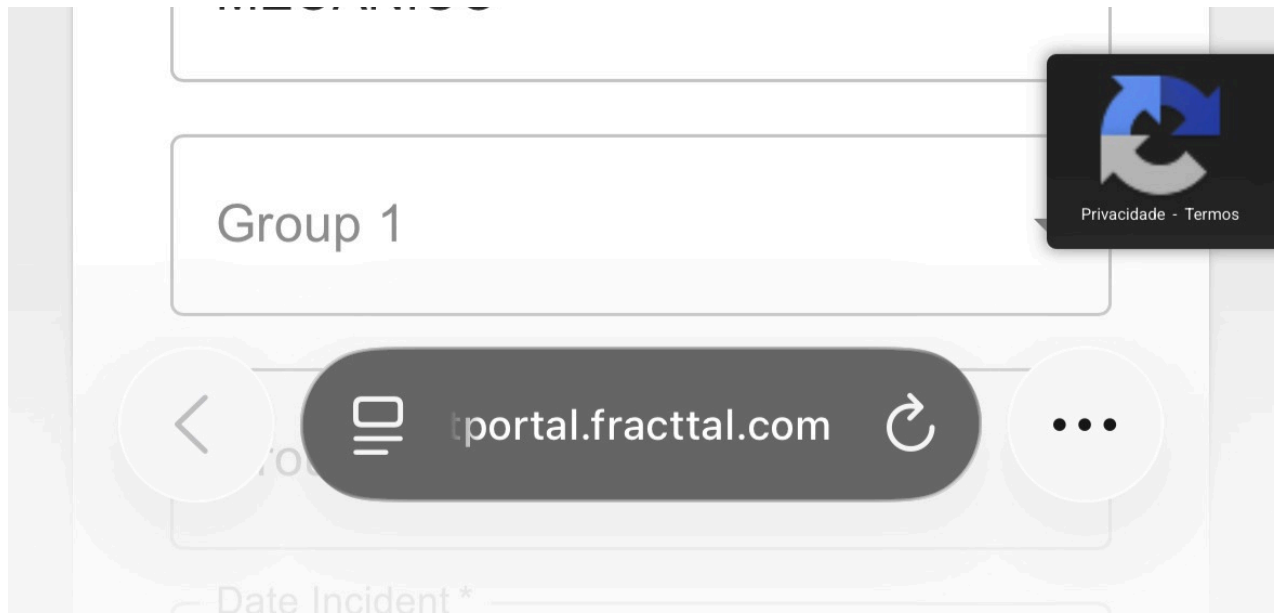
...Equipo Escanado



Group

MECANICO





1. Access the Guest Portal using the public URL, as if you were an external user.
2. Create a test request to verify that all fields are displayed correctly, that descriptions are clear, and that required fields function as expected.
3. Check that the test request appears correctly in the **requests** module of Fractal One.