What are Custom forms?

help2.fracttal.com/hc/en-us/articles/25230165717133-What-are-Custom-forms

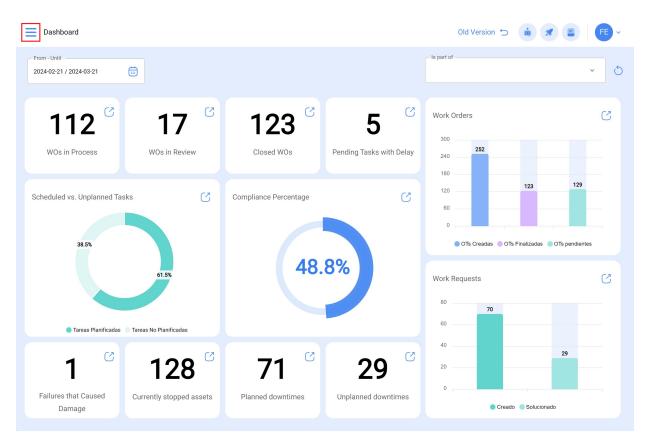
The forms or custom fields are groups in which assets can be categorized, but having in common a set of fields or labels that can be created and customized as required.

Main Characteristics:

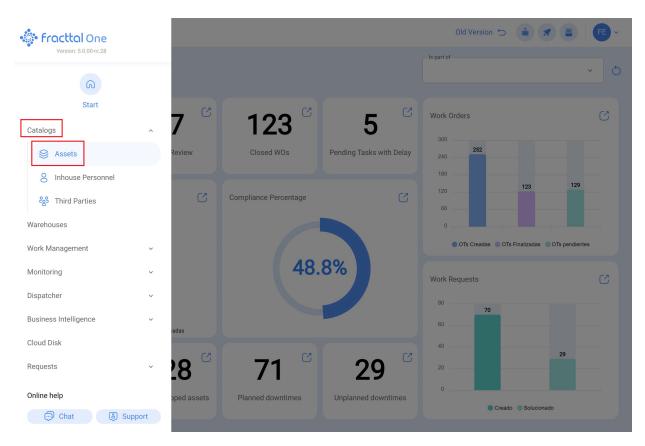
- 1. **Customizable Fields:** Field customization is crucial. Users can define and adapt fields according to the particularities of their business or project. This ensures that the information collected is relevant and specific.
- 2. **Flexibility in Tags:** Custom tags or labels are essential for searching and filtering data. Custom forms allow for flexible creation and assignment of tags, enhancing search and analysis capabilities.
- 3. **Adaptability to Business Processes:** By being able to customize forms, companies can adapt the data structure to their specific processes. This is crucial to maintain consistency in information collection and analysis.

How to create a customized form for an asset?

1. Log in and click on the menu located at the top left of the screen.



2. In the menu, select the "Catalogs" module.



3. select the active option.

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(()					× 0
Start				Work Orders	C
Catalogs ^	/	123	5	300	U
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8 Inhouse Personnel				180 12:	129
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Warehouses				0 ,,	
Work Management ~				OTs Creadas OTs Finaliz	adas 🔵 OTs pendientes
Monitoring ~		48.	.8%	Work Requests	C
Dispatcher ~				80 70	_
Business Intelligence 🗸	adas			60	
Cloud Disk				40	
Requests v	28	71 [°]	29 0	20	29
Online help	oped assets	Planned downtimes	Unplanned downtimes	0	
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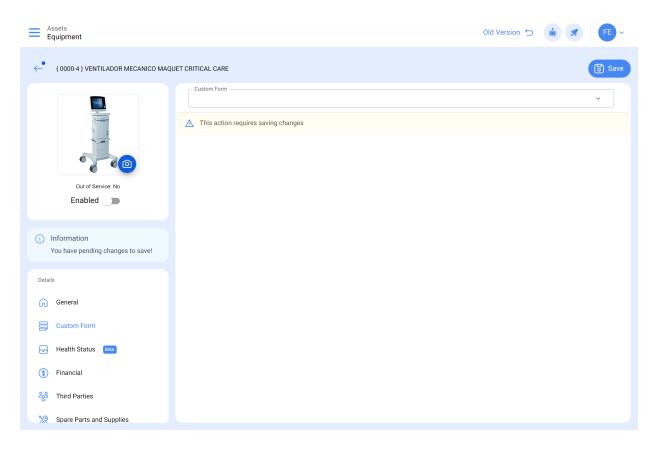
4. Select the asset type where you want to set the custom form.

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+ X Spare Parts Digitals nsultoria Mineral			
Maps HAYCO //			
+ O Clientes Rogerio //			
Edificio Palau			
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+ Energy Services //			
+ Empresa Matriz //			+

5. Select the specific asset where you want to set the custom form. If the asset does not exist, create it by clicking on the plus (+) symbol in the lower right corner.

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Equipment ~					0 = \$:
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000-2 } VENTILADOR MECANICO ARYZTA	Yes	Yes	000-2	CLASE 1	24:00	PL
000-3 } VENTILADOR MECANICO ARYZTA	Yes	No	000-3	CLASE 1	24:00	PL
001-01 } MAQUINA DE EMPAQUE	No	No	001-01		24:00	
O { 001-02 } MAQUINA DE EMPAQUE	Yes	No	001-02		24:00	
(001235) Carro Ford	Yes	No	001235		24:00	
01AP01001 } TURBINA G1 ANDRYZ	Yes	No	01AP01001		24:00	
01AP01002 } GOBERNADOR DE TURBINA	Yes	No	01AP01002		24:00	
(05) BEBEDOURO - JOÃO LUCAS	Yes	No	05		24:00	PL
{1213 } MAQUINA PRINCIPAL	Yes	No	1213		24:00	
{ 1214 } Break principal Eafit Idiomas Emerson	Yes	No	1214	Suministro	24:00	Ma
{ 123123 } Vehículo Consignaciones Bertolaza	Yes	No	123123		24:00	МТ
Showing 50 of 3124						+

6. Within the selected asset, in the left side menu, choose the "Custom Form" option.



7. Click on the rectangle under the heading "Custom Form".

Assets Equipment		Old Version 🕤 🙀 🗲 🗲
(0000-4) VENTILADOR MECANICO MAG	QUET CRITICAL CARE	Save
Out of Service: No Enabled	Custom Form	~
(i) Information You have pending changes to save!		
Details General Custom Form		
Health Status Reto		
 Third Parties Spare Parts and Supplies 		

8. Click on the plus (+) button in the lower right corner of the box.

Equipment		- Custom Form	2
(0000-4) VENTILADOR MECANICO MAG	QUET CRITICAL CARE	0	Ŧ
	Custom Form	C Equipo Goiko	
	This action requires saving changes	EETT Ubicaciones CIEMSA	
		Prueba	
Out of Service: No Enabled		FICHA ADICIONAL DE LLENADORAS	
 Information You have pending changes to save! 		CARACTERISTICAS DE CHILLERS	
Details		FORMULARIO PARA KITS	
General		FORMULARIO PARA CORTADORA DE PLASMA	
Health Status Reta		C EETT EQUIPOS BLASTING	
(\$) Financial		CARACTERISTICAS GENERALES DE BALANZAS	
Spare Parts and Supplies		Showing 50 of 256	

9. In the description box, add a title that reflects the purpose of your new custom form and then click "Save".

Equipment		← Custom Form	
(0000-4) VENTILADOR MECANICO MAG	QUET CRITICAL CARE	Description	
Out of Service. No Enabled	Custom Form This action requires saving changes	Invalid field	
(i) Information You have pending changes to save!			
Details			

10. Select the newly created title.

Equipment		← Custom Form	6
← {0000-4} VENTILADOR MECANICO MAC	UET CRITICAL CARE	Description	
	Custom Form -	Invalid field	
	A This action requires saving changes		
Out of Service: No Enabled			
Information You have pending changes to save!			
Details			
General			
Custom Form			
Health Status Bota			
(\$) Financial			
හි Third Parties			
Spare Parts and Supplies			

11. Click on the pencil icon on the paper.

Equipos		📩 🕕 🎯 😩 Fabián 🗸
{ 0000-4 } MAQUET CRITICAL CARE 1	/ENTILADOR MECANICO	GUARDAR
Fuera de servicio: No Habilitado	Formulario Personalizado Nombres de los operarios de máquina	- ®
 Información Tiene cambios pendientes por guardar! 		
Detalles General Formulario Personalizado		
Formulario Personalizado Estado de Salud Ress Financiero		
Cerceros		
 Historiales Adjuntos 		

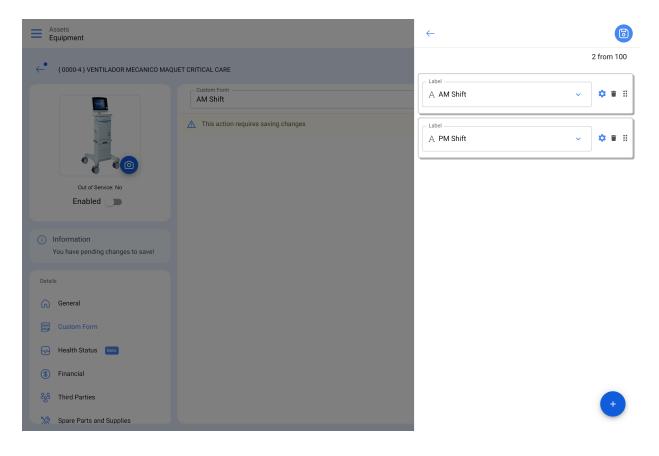
12. Click on the plus (+) symbol in the lower right corner of the box.

Assets Equipment		- Custom Form	Q
{0000-4} VENTILADOR MECANICO MAQ	UET CRITICAL CARE	0	Ŧ
	Custom Form -	C Equipo Goiko	
	A This action requires saving changes	EETT Ubicaciones CIEMSA	
6 60		O Prueba	
Out of Service: No Enabled		☐ FICHA ADICIONAL DE LLENADORAS	
Information You have pending changes to save!		CARACTERISTICAS DE CHILLERS	
Details		O FORMULARIO PARA KITS	
General		☐ FORMULARIO PARA CORTADORA DE PLASMA	
Custom Form		EETT EQUIPOS BLASTING	
(§) Financial		CARACTERISTICAS GENERALES DE BALANZAS	
 ** Third Parties ** Spare Parts and Supplies 		Showing 50 of 256	+

13. In the label box, enter a title that represents the data you wish to obtain on the custom form (e.g. Weight, Voltage, etc.) and then click "Save".

Assets Equipment		← Custom Form	6
(0000-4) VENTILADOR MECANICO MAC	UET CRITICAL CARE	Description	
Out of Service No Enabled	Custom Form	Invalid Reid	
Information You have pending changes to save!			
Details Octails Oracle Custom Form Health Status			
 Financial Third Parties Spare Parts and Supplies 			

14. If you want to add more data to the custom form, repeat the previous step.



15. Finally, click on "Save" to enter the data in your new customized form.

Assets Equipment		Old Version 🕤 i 💰 FE -
← {0000-4 } VENTILADOR MECANICO MAC	UUET CRITICAL CARE	Save
Out of Service: No Enabled	Custom Form AM Shift A This action requires saving changes	~ 🛞 🖉
Information You have pending changes to save!		
Details		
🕤 General		
Custom Form		
Health Status Beta		
(\$) Financial		
So Third Parties		
5 Spare Parts and Supplies		

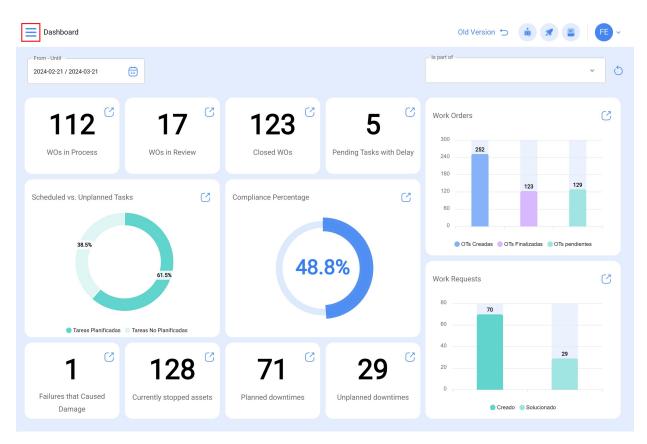
By following these steps, you will have successfully created a customized form and entered the desired information.

Equipment		Old Version 🕤 💼 🚿 F 🗸
- { 0000-4 } VENTILADOR MECANICO MAG	QUET CRITICAL CARE	Save
	AM Shift	~ 🛞 🖉
Out of Service: No Enabled	PM Shift	
Details		
General		
Custom Form		
Health Status Beta		
(\$) Financial		
왕 Third Parties		
👷 Spare Parts and Supplies		
) Historical	Action Done X	
Attachments		

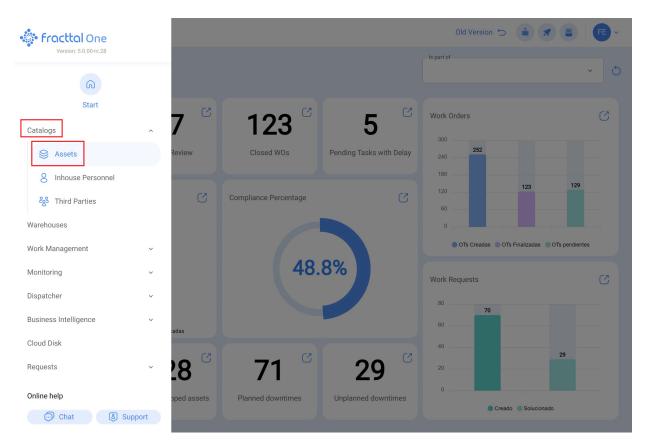
Remember that this information that you have created in the custom form can be filtered in case you want to extract information.

How do I filter an existing custom form?

1. Log in and click on the menu located at the top left of the screen.



2. In the menu, select the "Catalogs" module.



3. select the active option.

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Version: 5.0.00-rc.28				- Is part of	~ 5
Start	67		C7		
Catalogs	7 🖒	123 [°]	5 [°]	Work Orders	S
S Assets	Review	Closed WOs	Pending Tasks with Delay	240	
8 Inhouse Personnel 8 Third Parties	C	Compliance Percentage	D	120 123 60 1	129
Warehouses				0 OTs Creadas OTs Finalizadas	OTo pandiantes
Work Management ~		48.	.8%		
Dispatcher 🗸				Work Requests	Ċ
Business Intelligence v	adas			70 60	
Cloud Disk	C			40	29
Requests ~	28	71	29	20	
Online help Chat Support	oped assets	Planned downtimes	Unplanned downtimes	0 Creado Soluciona	do

4. Select the asset type where you want to set the custom form filter.

Assets Tree View	Q Search	Old Version 🕤	
 ⊗ All Assets ~ + S All Assets 			5 ∓ \$
O Locations Sequipment			
Fools Spare Parts			
+ Digitals Maps nsultoria Mineral			
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+ (c) Clientes Rogerio			
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+ (i) Energy Services			
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5. Select the filter option.

Equi				Q Buscar	i (C 2	Fabián 🗸	
EQUI							
	A 🗄 ÁRBOL						
	Habilitado	Fuera de servicio	Descripción	Código	Nombre DEL EQUIPO	Fabri	
	No	No	{ 0000-4 } MAQUET CRITICAL CARE VENTILADOR MECANICO	0000-4	VENTILADOR MECANICO	MA	
	Si	Si	{ 000-2 } MAQUET CRITICAL CARE VENTILADOR MECANICO	000-2	VENTILADOR MECANICO	MA	
	Si	Νο	{ 000-3 } MAQUET CRITICAL CARE VENTILADOR MECANICO	000-3	VENTILADOR MECANICO	MA	
	No	No	{ 001-01 } MAQUINA DE EMPAQUE	001-01	MAQUINA DE EMPAQUE		
	Si	Νο	{001-02 } MAQUINA DE EMPAQUE	001-02	MAQUINA DE EMPAQUE		
	Si	No	{ 001235 } Ford Carro	001235	Carro	For	
	Si	No	{01AP01001 } ANDRYZ TURBINA G1	01AP01001	TURBINA G1	ANI	
	Si	No	{01AP01002} GOBERNADOR DE TURBINA	01AP01002	GOBERNADOR DE TURBINA		
	Si	No	{ 05 } BEBEDOURO - JOÃO LUCAS	05	BEBEDOURO - JOÃO LUCAS		
	Si	No	{ 1213 } MAQUINA PRINCIPAL	1213	MAQUINA PRINCIPAL		
	Si	No	{ 1214 } Emerson Break principal Eafit Idiomas	1214	Break principal Eafit Idiomas	Em	
	Si	Νο	{ 123123 } Vehículo Consignaciones Bertolaza	123123	Vehículo Consignaciones Bertolaza	+	

6. In the different options, look for the "custom form" box at the bottom.

Equip			(Q 8 🧹 Filtrar
				Fecha de Compra
	Habilitado	Fuera de servicio	Descripción	Ubicado en ó es Parte de — Buscar
	No	No	{0000-4 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Horas de uso promedio diario
	Si	Si	{000-2 } MAQUET CRITICAL CARE VENTILADOR MECANICO	00:00
	Si	No	{000-3 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Visible para todos TODO SI NO
	No	No	(001-01) MAQUINA DE EMPAQUE	Plan de Tareas
	Si	No	{ 001-02 } MAQUINA DE EMPAQUE	Buscar
	Si	No	{ 001235 } Ford Carro	Notas Buscar
	Si	No	{ 01AP01001 } ANDRYZ TURBINA G1	Centro de costo
	Si	No	{ 01AP01002 } GOBERNADOR DE TURBINA	Buscar
	Si	No	{ 05 } BEBEDOURO - JOÃO LUCAS	Presupuesto Buscar
	Si	No	{ 1213 } MAQUINA PRINCIPAL	Formulario Personalizado
	Si	No	{ 1214 } Emerson Break principal Eafit Idiomas	
	Si	No	{123123 } Vehículo Consignaciones Bertolaza	

7. Search for the name of the custom form you have previously created.

Equip			Q B	Qoper	\otimes	Mostrando 4 de 4
S EQUIP				Operario: Cristian Delgado		
	E ÁRBOL			Cooperativa d'Ivars		
	Habilitado	Fuera de servicio	Descripción			
			{ 0000-4 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Datos de los operarios de la máquina		
			{ 000-2 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Nombres de los operarios de máquina		
			{ 000-3 } MAQUET CRITICAL CARE VENTILADOR MECANICO			
			{ 001-01 } MAQUINA DE EMPAQUE			
			{ 001-02 } MAQUINA DE EMPAQUE			
			{01AP01001 } ANDRYZ TURBINA G1			
			{ 01AP01002 } GOBERNADOR DE TURBINA			
			{ 1213 } MAQUINA PRINCIPAL			
			{ 1214 } Emerson Break principal Eafit Idiomas			
	Si	No	{123123 } Vehiculo Consignaciones Bertolaza			

8. Select apply filters.

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EQU	JIPOS -			- Ubicado en ó es Parte de
i⊟ List	TA HE ÁRBOL			 Horas de uso promedio diario 00:00
	Habilitado	Fuera de servicio	Descripción	
	No	No	{0000-4 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Visible para todos TODO SI NO
	Si	Si	{ 000-2 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Plan de Tareas
	Si	No	{ 000-3 } MAQUET CRITICAL CARE VENTILADOR MECANICO	Buscar
	No	No	{ 001-01 } MAQUINA DE EMPAQUE	- Notas Buscar
	Si	No	{001-02 } MAQUINA DE EMPAQUE	Centro de costo
	Si	No	{ 001235 } Ford Carro	Buscar
	Si	No	{01AP01001 } ANDRYZ TURBINA G1	Presupuesto Buscar
	Si	No	{ 01AP01002 } GOBERNADOR DE TURBINA	Formulario Personalizado Nombres de los operarios de máquina - 🗸
	Si	No	{ 05 } BEBEDOURO - JOÃO LUCAS	Operario jomada AM
	Si	No	{ 1213 } MAQUINA PRINCIPAL	Buscar
	Si	No	{ 1214 } Emerson Break principal Eafit Idiomas	Operario jornada PM Buscar
	Si	No	(123123) Vehículo Consignaciones Bertolaza	BORRAR FILTROS

Scroll to the bottom of the interface and there you will find the filtered data.

Equip			Q Buscar		Ĵ 🕝 😫 Fabián ∨
	POS - E Form	nulario Personalizado: Nombres de los operarios de máquin	a 😒	Mostrando 1 de 1	C III 🕂 :
	A 🗄 ÁRBOL				
e costo	Presupuesto	Url Código QR	Formulario Personalizado	Operario jornada AM	Operario jornada PM
)	EQUIPOS ()	https://app.fracttal.com/#inventories.equipments/30048728	Nombres de los operarios de máquina	Elkin Alfonso Montoya P	Héctor Montoya
		l			
					(