

Custom fields and forms

System administration

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Add your own fields, hide ones you do not use and change how a form is laid out, without any coding.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Overview

Every business has a detail the standard forms do not capture, such as a delivery driver or a customer's PO number. **Customize Form** lets you add fields and change existing ones, safely, and your changes survive software updates.

Prerequisites

The System Manager role.

Steps

Add a field

1. Search for **Customize Form**.
2. Choose the **Document Type**, such as *Delivery Note*.
3. Scroll to the **Fields** table and click **Add Row**.
4. Enter the **Label** (for example `Delivery Driver`), choose the **Type** (Data, Link, Select, Date, Check and so on).
5. Use the **Insert After** setting to place it, and tick **Mandatory** if it must be filled.
6. Click **Update**. Reload the form to see the new field.

Change an existing field

1. In the **Fields** table, click the field.
2. Change its **Label**, tick **Hidden**, or tick **Read Only**.
3. Click **Update**.

Practical example

The shop adds a *Customer PO Number* field (type *Data*) to **Sales Invoice**, placed after *Customer*. It is also added to the print format, so the number appears on each invoice. It is easy to find when a customer queries the invoice.

Important notes

- **Do not hide mandatory fields** the system needs, or documents cannot be saved.
- Test on a draft record before using it widely.
- Choose the **Type** carefully. Changing it later can lose data.

Common mistakes

- Adding many fields nobody uses.
- Forgetting to add the new field to the print format so it never prints.

Next steps

Read Workflows and notifications.

Related documentation

- Print formats and letterheads
- Document numbering