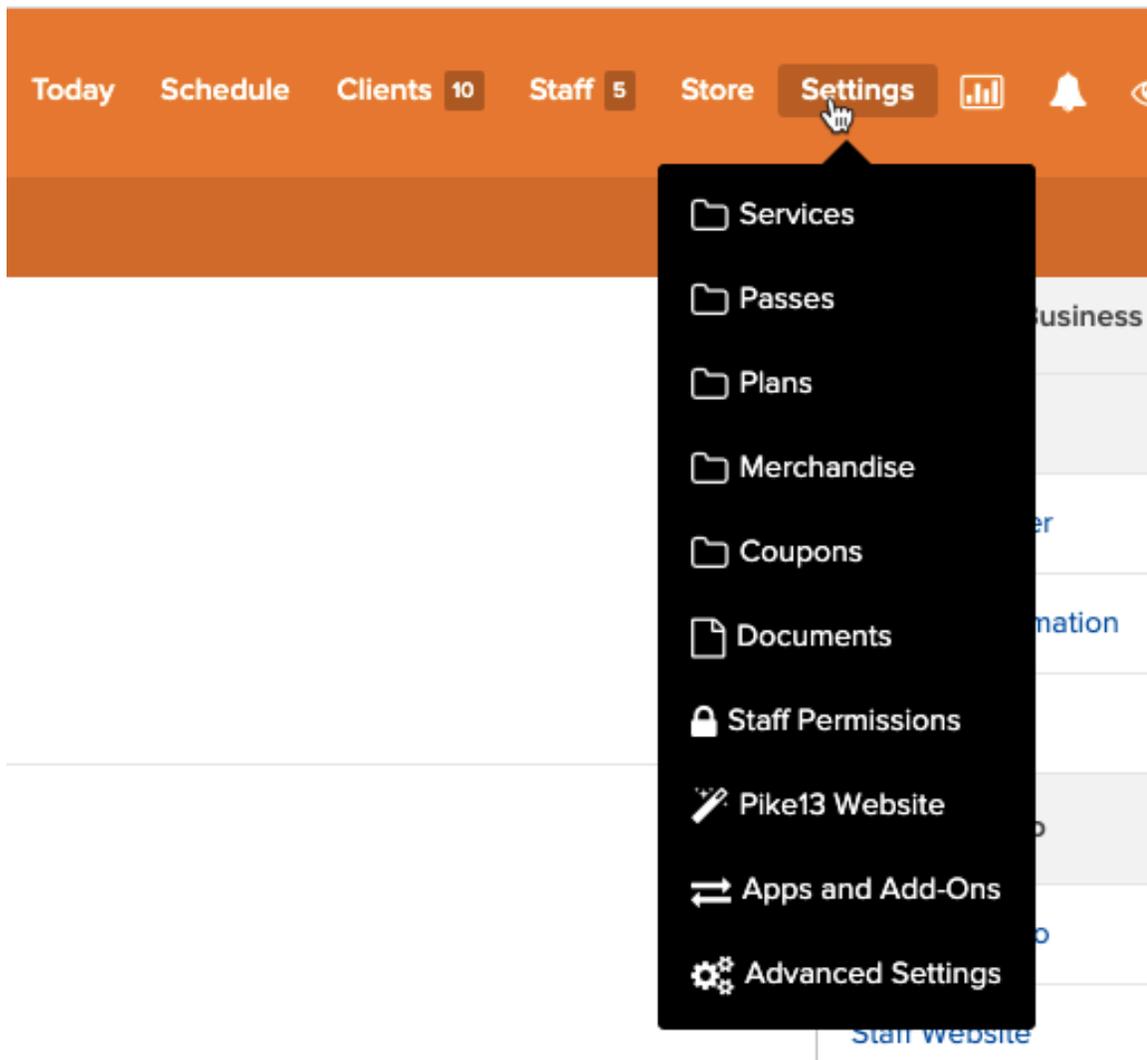


## Creating Custom Client Fields

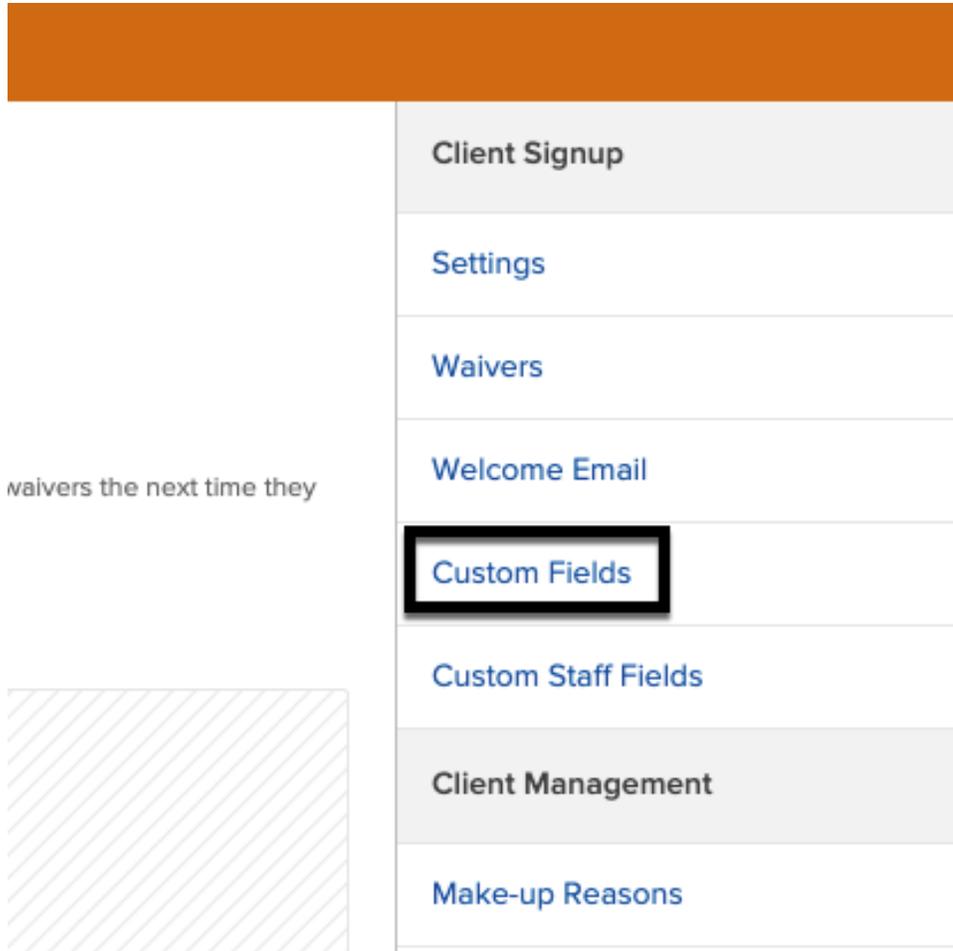
If you wish to collect additional information when clients create an account, you can add custom client fields.

### To Create a Custom Field:

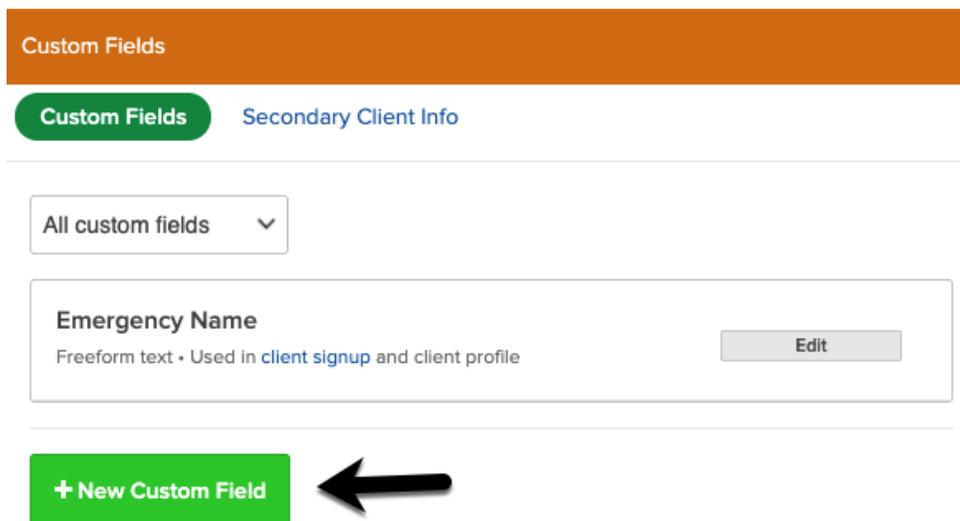
- 1) Click Settings at the top of the page and select Advanced Settings



- 2) Scroll down to Client Signup section and select Custom Fields.



3) Select New Custom Field.



4) From here, add in the name of the custom field, the reason you have requested this information, and how clients can enter their information.

### New Custom Field

\* Custom field name

Why ask for this? (600 character limit)  **Optional**

Explain to clients the reason for needing this info

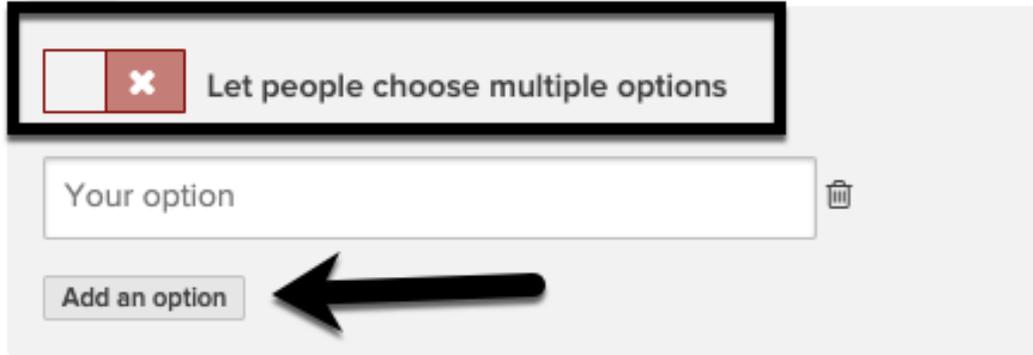
Which answer options do you want to offer?

- Freeform text
- Date only
- List of choices you define
- Yes or No answer

\*If you choose **List of choices you define**, you will need select whether clients can select more than one answer  or only one answer  then enter each option.

Which answer options do you want to offer?

List of choices you define ▾



Let people choose multiple options

Your option 

Add an option 

- 5) When creating custom fields, you want to be sure you are collecting information for the correct person. Depending on the information you are collecting, you can determine whether it is required, optional or not shown for different types of people. The three types of people who may sign up for a Pike13 account are listed below.

## New Custom Field

### Is this field required, optional, or hidden during client signup?

For clients who might also manage others, this field is:

<input type="checkbox"/> Required	<b>This is a client who may also manage another client. For example, a spouse may manage their spouse's profile.</b>
<input type="checkbox"/> Optional	
<input checked="" type="checkbox"/> Not shown	

For non-clients who manage clients, this field is:

<input type="checkbox"/> Required	<b>This is typically a parent who is only enrolling their children. They simply manage their child's account.</b>
<input type="checkbox"/> Optional	
<input checked="" type="checkbox"/> Not shown	

For clients who are managed, this field is:

<input type="checkbox"/> Required	<b>This is a child or adult who is managed by another non-client or client.</b>
<input type="checkbox"/> Optional	
<input checked="" type="checkbox"/> Not shown	

- 6) You can also determine who can see the data in these fields after it has been entered.

New Custom Field

Is this field used in client profiles?

On client profiles, this field is:

<input type="checkbox"/>	Shown to clients and staff members	<b>Clients can edit the information at any time.</b>
<input type="checkbox"/>	Shown to staff members only	<b>Only staff can edit the information.</b>
<input checked="" type="checkbox"/>	Not shown	<b>Neither clients or staff members can see or edit this information.</b>

Is this field required when staff members claim their accounts?

For all staff members, this field is:

<input type="checkbox"/>	Required	<b>If staff members need to complete this field in their staff profile, you can make it required or optional. If they do not, you can select that the field is not show.</b>
<input type="checkbox"/>	Optional	
<input checked="" type="checkbox"/>	Not shown	

Is this field used in staff member profiles?

On staff member profiles, this field is:

<input type="checkbox"/>	Shown to all staff members	<b>If staff members do complete this field, you can select who can see and edit the field.</b>
<input type="checkbox"/>	Shown to managers and owners	
<input checked="" type="checkbox"/>	Not shown	

7) If your plan includes waivers, you can select whether this field can be shown in the waiver. Please note when a custom field is added to a waiver, the field will be required to be completed prior to signing.

## Can this field be used when creating documents?

For creating online documents, this field is:

<input checked="" type="checkbox"/> Shown
<input type="checkbox"/> Not shown

<input checked="" type="button" value="Save"/>	<input type="button" value="Delete"/>	<input type="button" value="Cancel"/>
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8) When completed, click Save.