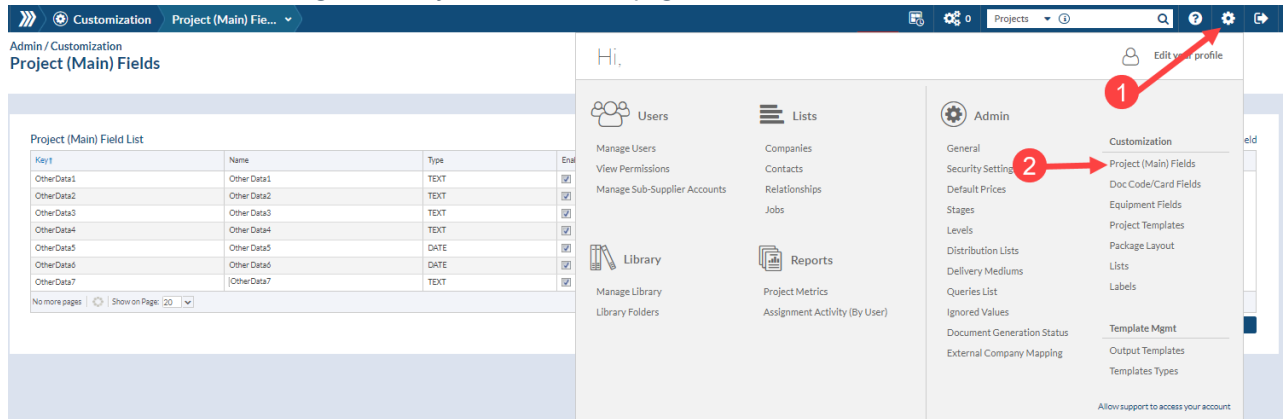


# Other Data - Project (Main) Fields

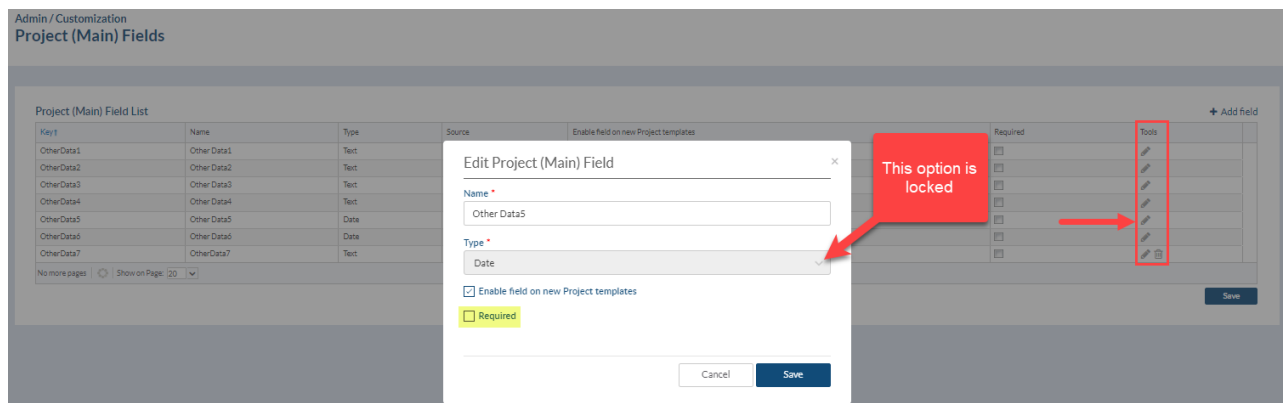
12/26/2025 3:36 pm MST

Users may now add an unlimited number of custom fields to the main area of projects. Create new date, text, or list fields. There is also an option to define whether fields are mandatory. Users may apply them to any or all project templates.

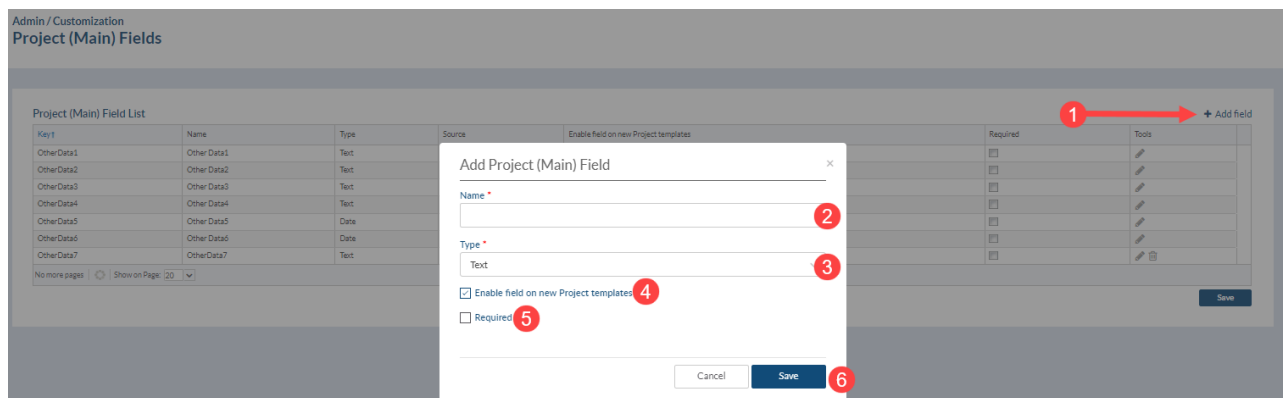
Other Data Fields are managed via Project (Main) Fields page.



Here you can see any existing fields. Note: if the fields have been used on any existing or previous projects you will not see a delete option. You will also not be able to edit the Type from date to text, or vice versa. You can edit to make this field "required".



## To Add a new Field:



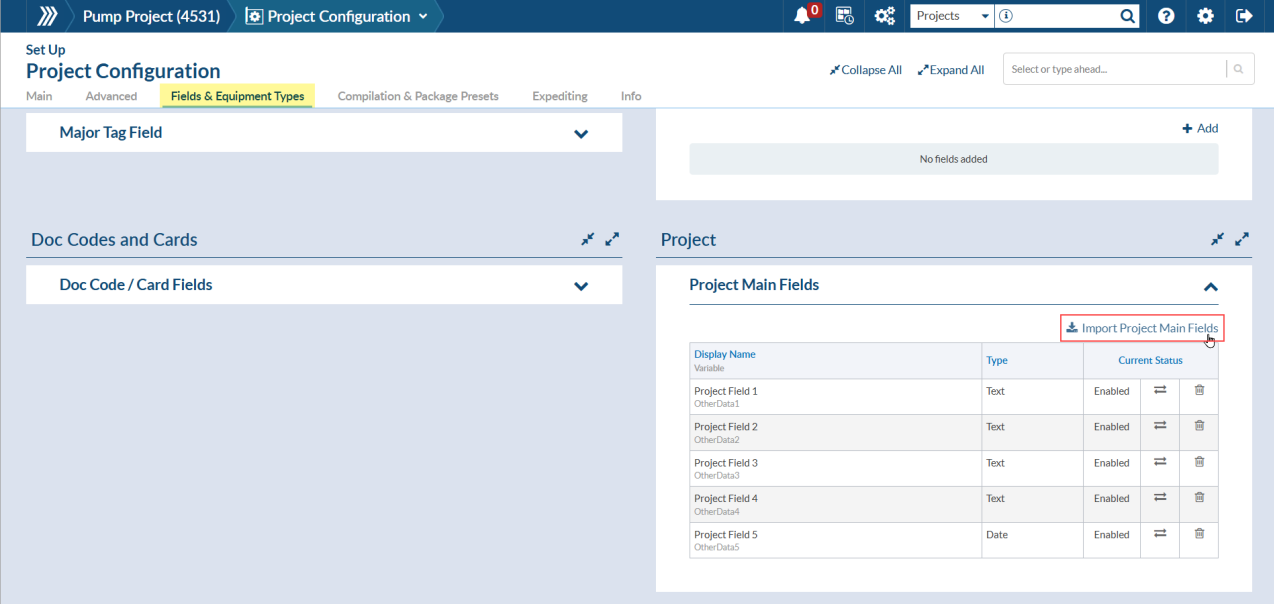
- 1) Click "Add Field"
- 2) Name the field
- 3) Choose if you want a Text, Date or List field (for information on creating a List, see our article [here](#).)
- 4) Click to Enable field on **new** Project templates
- 5) Click to make this field Required
- 6) Save

## To enable new Fields on existing projects

Once a custom project (main) field has been created, you must import it into the project from the **Project Configuration** page. To do this, navigate to **Project Menu > Set Up > Project Configuration**. Open the "Fields & Equipment Types" tab and expand the "Project Main Fields" section. Click the "Import Project Main Fields" option, choose the field(s) to import, and click "Add." Once imported, the field(s) will automatically be enabled.

If a field should be disabled, select the arrow button to change the field from "Enabled" to "Disabled." If the field should be removed from the project entirely, click the delete button.

*\*Note: Removing the field from the project will not delete it from admin.*



The screenshot shows the 'Project Configuration' page for 'Pump Project (4531)'. The 'Fields & Equipment Types' tab is selected. The 'Project Main Fields' section is expanded, showing a table of fields. The 'Import Project Main Fields' button is highlighted with a red box.

Display Name	Type	Current Status
Project Field 1 OtherData1	Text	Enabled
Project Field 2 OtherData2	Text	Enabled
Project Field 3 OtherData3	Text	Enabled
Project Field 4 OtherData4	Text	Enabled
Project Field 5 OtherData5	Date	Enabled

Click the arrows to enable the fields on the project.

## Filtering "Other Data" on Multi-Project Card Report

Multi-project card report

Project:

- Select or type ahead -

Doc Code:

- Select or type ahead -

Internal Code:

- Select Internal Code -

☐ Due to Customer:

☐ Expected Return to Demo:

Days since last request:

Job:

- Select Job -

Stage:

- Select Stages -

Location:

- Select Location -

Sub-Supplier:

- Select Sub-Supplier -

☐ The ONLY Sub-Supplier

Customer Status:

- Select Status -

Routing:

- Select Routing -

Level:

- Select Level -

State:

- Select State -

Approval Status:

- Select Status -

Clear

Search

Grid Rows Colors

Doc No. Values

Set expected date

Generate Request

Bulk Doc Download

Card List

Other Data 1 1 Y	Last In Submittal	Demo Doc Control User 1 Y	Select	Project	Card Name(Auto)	Document	Reference	Level	Doc Code	Stage	Sta
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	G130 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	G130 LOOP DRAWINGS	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	Z1 Supplier1 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	Z1 Supplier1 Supplier 1 MR Compilation	ISS	X<
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	E134_RDX-307T-D		RDX-307T-D	Vendor Part Number	E134 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	G133 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	G133 INSTRUMENTATION AND ELECTRICAL ARRANGEMENT DRA...	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	Z1 Supplier2 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	Z1 Supplier2 Supplier 2 MR Compilation	ISS	X<
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	E134_RDX-407T-D		RDX-407T-D	Vendor Part Number	E134 MATERIAL LIST WITH DETAILED DESCRIPTION AND CATALO...	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	M128 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	M128 ELECTRICAL WIRING DIAGRAM	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	Z1 Supplier3 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	Z1 Supplier3 Supplier 3 MR Compilation	ISS	X<
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	E147_EEIS		EEIS	Sub-Supplier	E147 Vendor ISO Quality Manual	IFA	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	A131 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	A131 INSTALLATION OPERATION AND MAINTENANCE MANUAL	IFI	NU
Mechanical/HVAC	Compilation	Kirstie Reid	<input type="checkbox"/>	TBB HVAC Unit Heaters NGL-MEREQ-070003	P121 NGL-MEREQ-070003		NGL-MEREQ-070003	Order	P121 FUNCTIONAL AND PERFORMANCE TEST PROCEDURES	IFA	NU

First thing is to bring the Other Data column into the grid. Details on filtering the multi-project card report can be found [here](#).