Add Custom Doc Code/Card Fields

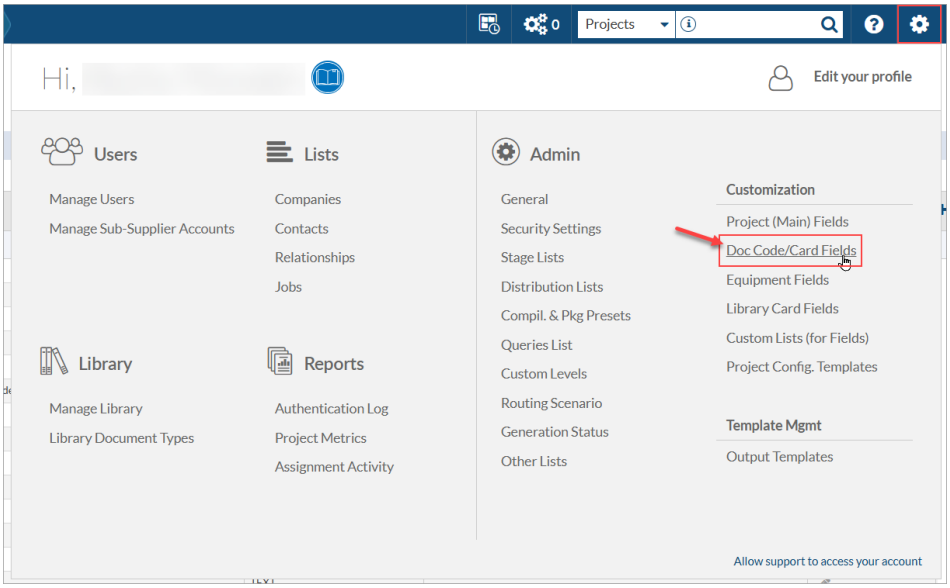
09/28/2026 9:37 am MDT

You can add custom fields to your cards. Here's how to create and manage them.

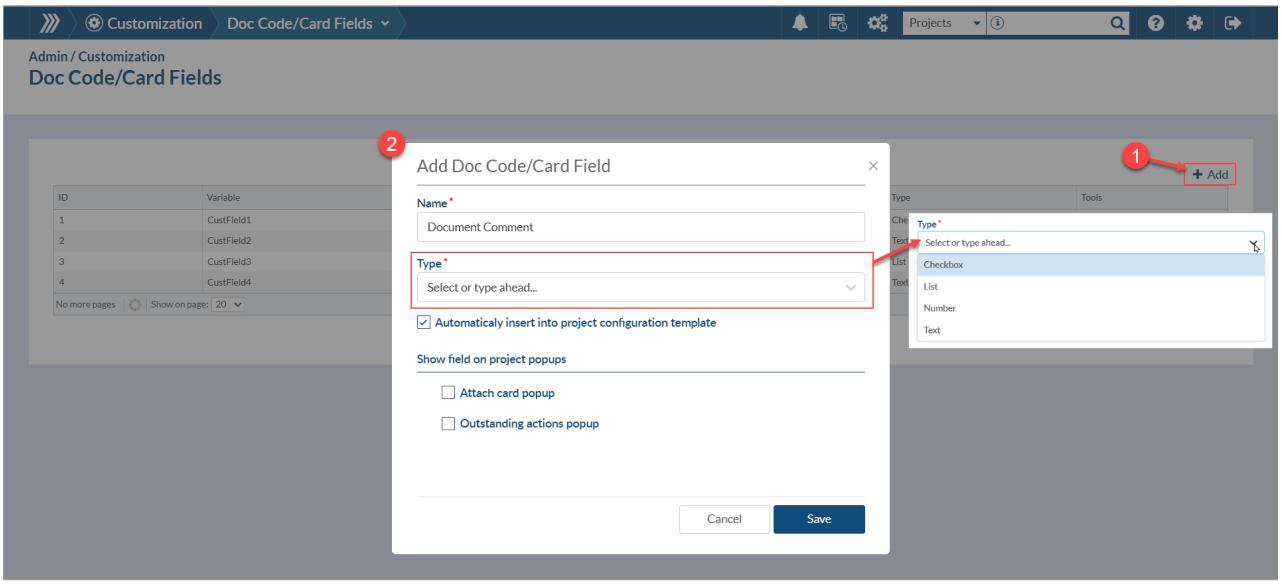
Create

The initial set up of custom doc code / card fields must be done by an **Admin** User. Once created, they can be enabled or disabled on any project.

To create a custom doc code/card field, navigate to **Admin > Customization > Doc Code/Card Fields.**

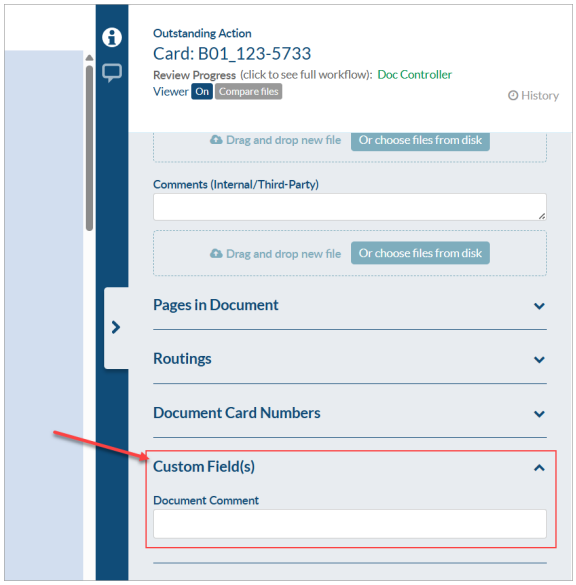


On the page, any existing fields will appear. To add a new field, click the "+ Add" button above the grid (top right). From the pop-up, give the new field a name and adjust the options as needed.



- **Type:** This is how you will enter the information into the custom column
  - Checkbox - Yes/No field.

    - List - Only specific values can be selected. The list can be a pre-existing user list, or a list you create (custom list). For more information, see this article: Create Lists for Custom Fields.
    - Number - Numeric field that allow for numeric sorting on the code/card list (rather than by the first digit of the entered value).
    - Text - Simple text field.
- **Automatically insert into project configuration template:** Will automatically import the field into new/existing project configuration templates (as well as into existing projects). To enable the field, see the instructions below.
- **Show field on project pop-ups:** Display (and allow editing) of this field from the incoming assignment (or outstanding actions) forms.



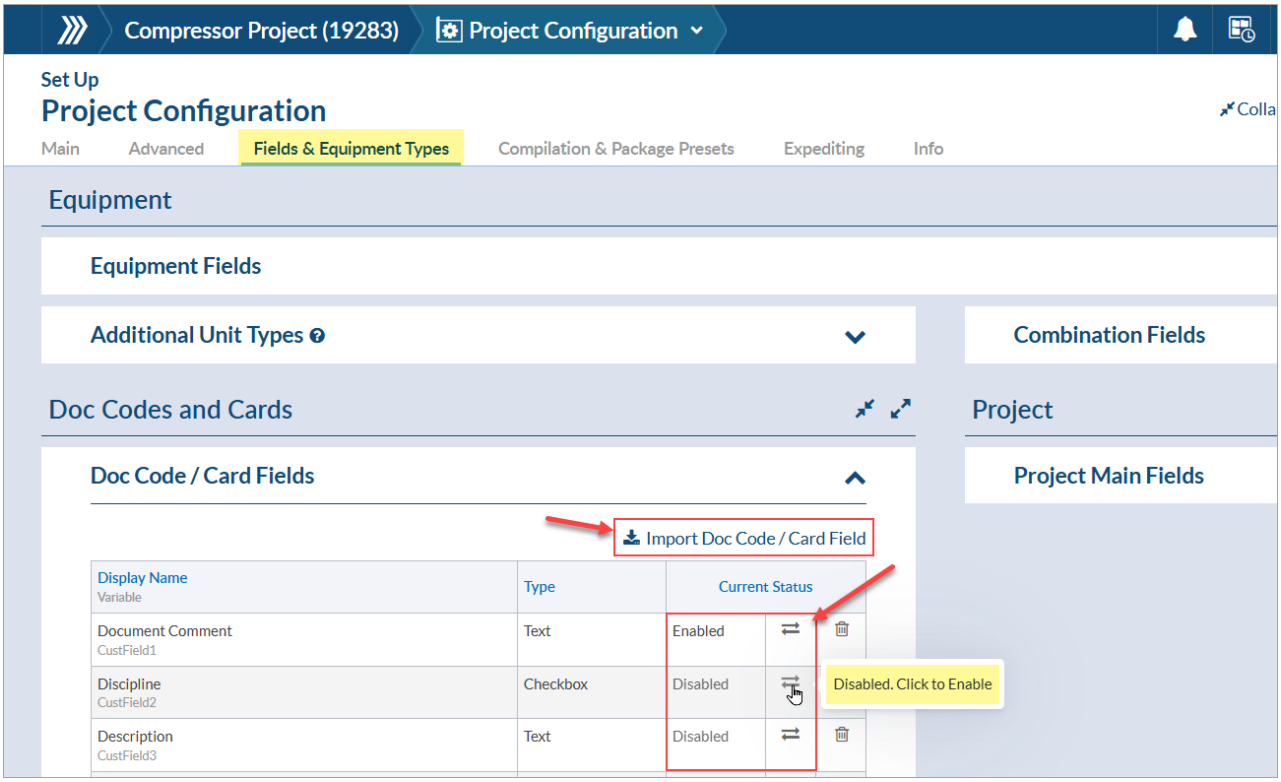
Note: Once a field is created, the field type (checkbox, list, etc.) **cannot** be modified. However, the field name **can** be modified from the grid or by clicking the pencil icon under "Tools". In addition, if a field has been used on a project, it cannot be deleted from the Admin list.

Enable on project

Once the field has been created, you must enable it on the project (if not automatically added at the time of creation). To do this, navigate to **Project Menu > Set Up > Project Configuration**. Open the "Fields & Equipment Types" tab and expand the "Doc Code / Card Fields" section.

In the grid, you can enable/disable the fields accordingly to meet your project requirements. If you do not see the field, first import it into the project by clicking "Import Doc Code / Card Field".

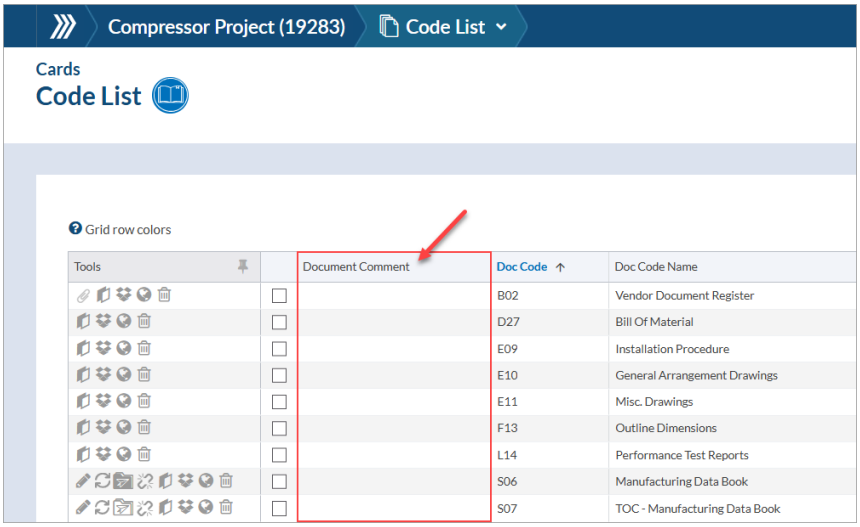
If the field should be removed from the project entirely, click the delete button.
**Note: Removing the field from the project will not delete it from admin.*



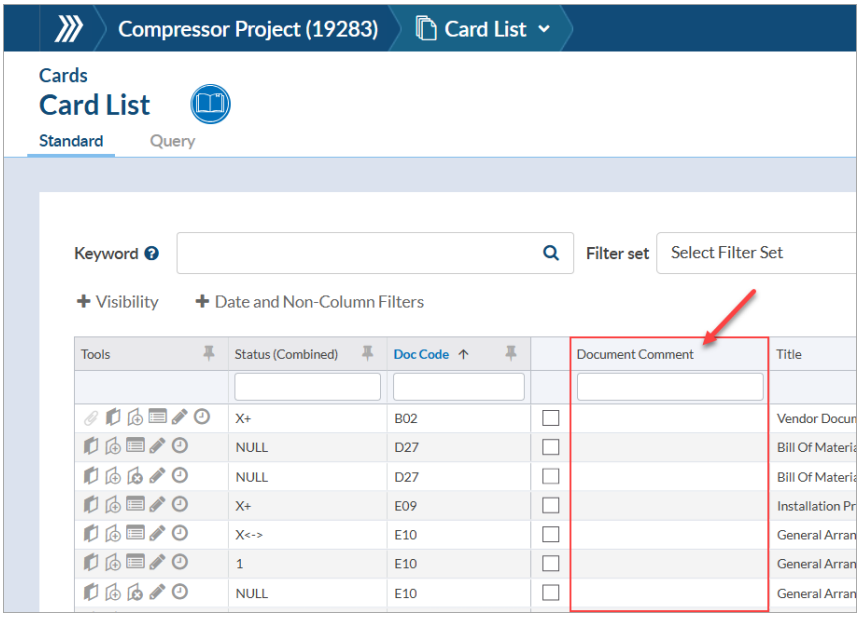
Using the field

With the "Document Comment" custom field enabled, let's see where you would find it on your project...

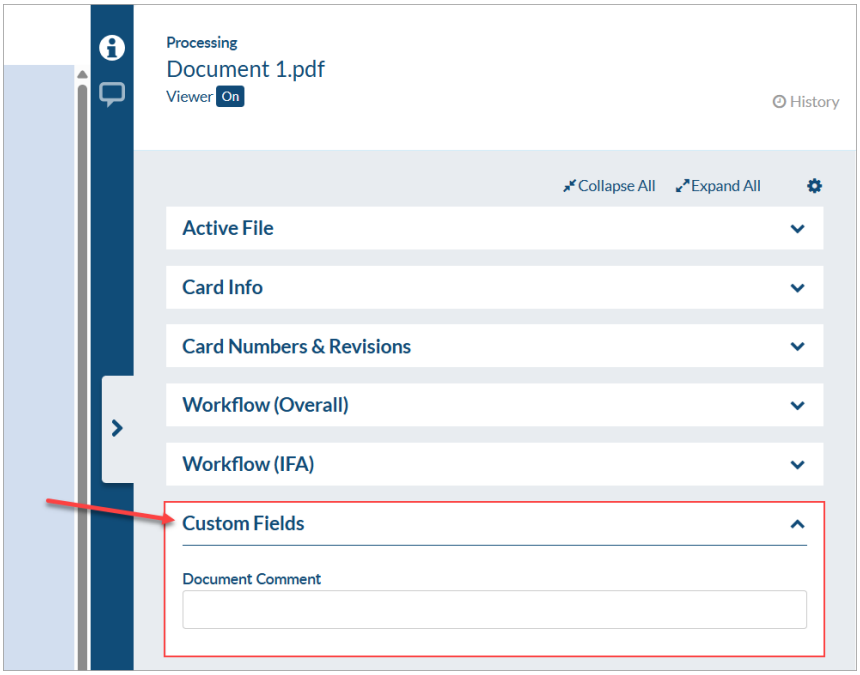
Code List



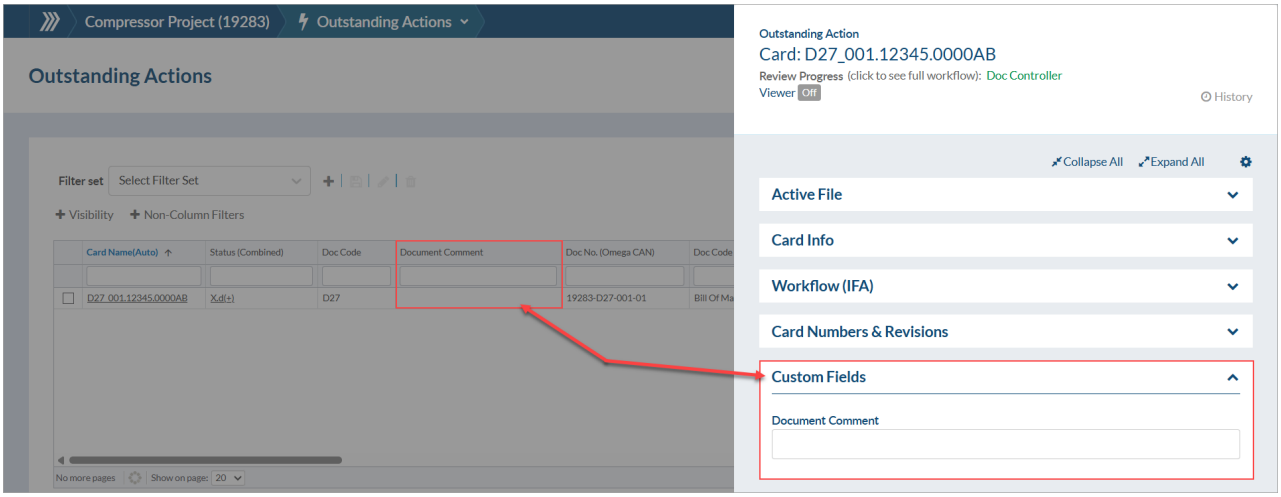
Card List



Incoming Assignment Form



Outstanding Actions



If you cannot find the column in any of the supported grids, confirm that it has been enabled to view.

Option 1: Hover over any column header and click the three lines (≡). Switch to the columns tab, search for the field, and enable it by checking the box.

Option 2: Expand the columns selector (far right of the grid), search for the field, and enable it by checking the box.

