

Fields

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Add Fields to an Object Type

An object type's fields are where users will input data. Fields are available in the following formats:


- **Text:** A text field that allows for a single line or multiple lines of text, [concatenations](#), [rich text formatting](#), and [translations](#).
- **Numeric:** A field that allows for numbers.
- **Date & Time:** A picker that allows you to select the date and time. All dates and times are saved and displayed in UTC format.
- **Select List:** A dropdown menu with multiple options to choose from.
- **Attachments:** An area on the form that allows users to upload files, insert links to websites, or both. Supported document files are [searchable](#) by keywords or upload dates.
- **Image Attachment:** A field through which images can be uploaded and embedded onto a form.

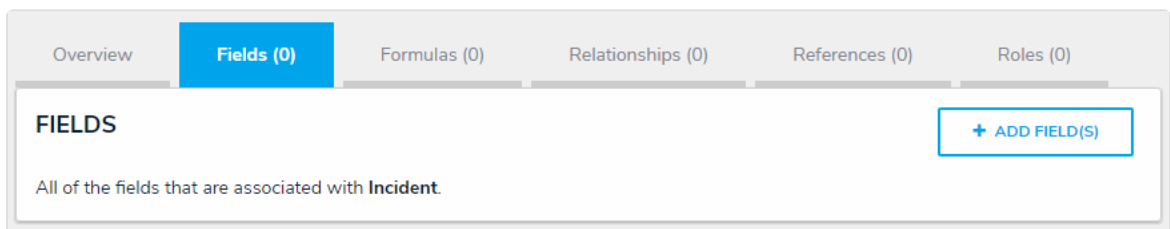
All fields saved to an object type will appear on the object type's [default form](#), but you can select which fields will appear on [configurable forms](#) associated with the object type.



This section explains how to create and add fields to an object type, but you can create, edit, and delete fields from the **Fields** settings. See the [Fields](#) section for more detailed information and instructions on each field type.

To add fields to an object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click to select the object type with to configure.
3. Click the **Fields** tab.



The Fields tab with no previously added fields on the object type.

4. To create a new field to add to the object type:
 - a. Click **Add Field(s) > Add a New Field**.
 - b. Select a field type from the **Field Type** dropdown menu.
 - c. Enter the field's details, including name, minimum and maximum number of characters, and any other settings as needed. If needed, provide additional information or instructions on completing the field in the **Long Name** section,

which can be styled using [Markdown](#).

Create a New Field ✕

Field Type
Numeric

Field Name
File Number

Long Name ⓘ

Minimum Characters
e.g. 10, 140, etc.

Minimum Characters is optional. It must be a whole number less than or equal to Maximum Characters (if set).

Maximum Characters
e.g. 10, 140, etc.

Maximum Characters is optional. It must be a whole number greater than or equal to Minimum Characters (if set).

Number Type
Number

Normal number, currency, phone number, etc.

CREATE AND LINK

The Create a New Field screen, accessed from the Edit Object Type page.

- d. Click **Create and Link** to add the field to the object type.



See the [Fields](#) section for more detailed information about each field type.

5. To add an existing field to the object type:


- a. Click **Add Field(s)**.
- b. Click one or more fields in the **Pick Fields to Add** section.

The screenshot shows a blue header with the text 'ADD A FIELD'. Below the header, there is a section titled 'PICK FIELDS TO ADD'. At the top of this section are two buttons: a green button with a plus sign and the text '+ ADD SELECTED (5)', and a blue button with a plus sign and the text '+ ADD A NEW FIELD'. Below the buttons, there are four field selection cards, each with a checkmark icon on the left. The first card is titled 'Additional Information Required' and has the text 'Plain Text field with multiple lines' below it. The second card is titled 'Address' and has the text 'Plain Text field with multiple lines' below it. The third card is titled 'Adequate Segregation of Duties?' and has the text 'Select List field with 2 options' below it. The fourth card is titled 'Assessment' and has the text 'Select List field with 5 options' below it. Below the 'Assessment' card, there is a fifth card titled 'Attachments' with the text 'Attachments field' below it.

Selecting existing fields to add to the object type.




Existing fields can be added to multiple object types; however, note that deleting the field or modifying the field's settings will affect **all** related object types.

- c. Click **Add Selected**.
6. To edit a field, click it in the tab to open the **Editing Field** page.
7. To delete a field **from the object type only**, click the  icon.
8. Click **Done** when finished.


Edit or Delete a Field

Important Notes

- If needed, you can change the field's unique name by clicking the  icon next to the **Unique Name** field to unlock and edit it; however, it's **strongly recommended** that you do not change the unique name as its default value is used throughout the Core system and altering it may interfere with existing data.
- Any changes to the field's settings are applied to all related object types.
- Deleting a field will remove it from all related object types.

To edit or delete a field:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Enter the name of the field in the **Search** field or click on a field in the list.

3. Make changes to the field's name as needed, including the **Field Name** and **Long Name**.
4. Make any other changes to the field as needed.
5. To delete the field, click the  icon, then click **Yes** to confirm.
6. Click **Done** when finished.



If the field has been [added](#) to one or more object types, those object types will appear in the **Related Object Types** section at the bottom of the **Editing Field** page. Click the object type to view its **Edit Object Type** page.