

ONSIGHT HOW TO:

ENABLE CUSTOM FIELDS FOR GUEST INVITATIONS

Custom fields enable you to learn more information about your guests and can aid in generating report data. In order to enable custom fields for your External Guest Invites, you must ensure that you are working with the latest version of Onsight Connect version 11.4.3. Your System Administrator can enable this option for your team within **Onsight Platform Manager**. You can download the latest software from our [Support page](#).

OVERVIEW:

You will need to:

- Login to Onsight Platform Manager
- Define Custom Field Names
- Define Custom Field Values (For each Name)
- Access Client Policy to enable Custom fields

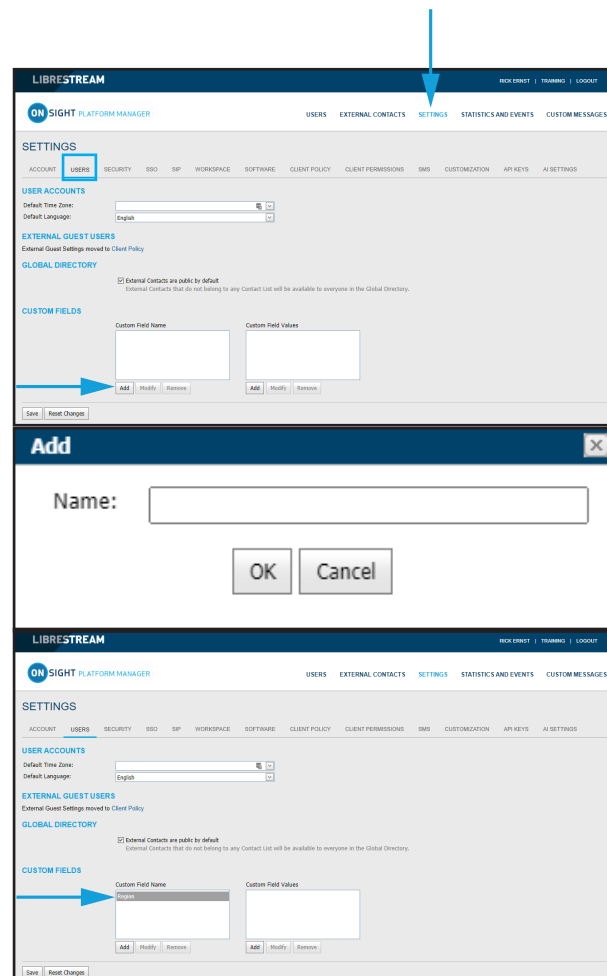
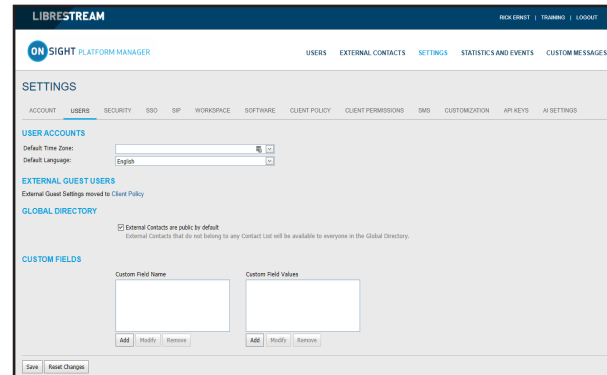
Defining Custom Field Names

1. Login to Onsight Platform Manager using your User Name and Password.
2. Click **SETTINGS** within the Main menu.
3. Select **USERS** within the **SETTINGS** section.
4. Locate the **CUSTOM FIELDS** section.
5. Click **Add** to create a custom field.
6. Enter text within the Name field and click **OK**. For example, type "Region".
7. Repeat to create additional custom field names as required.

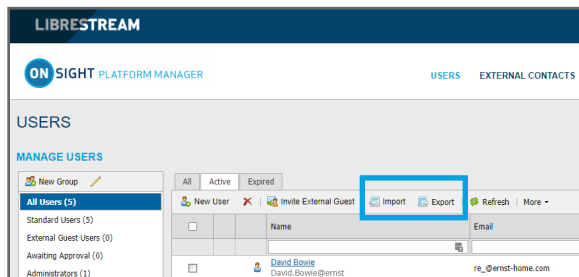
This completes the procedure

Defining Custom Field Values

1. Select one of the custom field names on the left. For example, select Region.
2. Locate the **Custom Field Values** section.
3. Click **Add** to create a custom field value.



- Enter text within the **Value** field. For example, type “North America” and click **OK**.
NOTE: User information and custom fields can be imported, modified, and exported out of OnSight Platform Manager using a Comma Separated Value (CSV) template file. Click **Users** and the **Manage Users** section. Activate the **Import** operation to download a template. You can also **Export** your existing user information out as a CSV file, as required.



For more information, refer to the **Import/Export Users** section within the [OnSight Platform Manager Admin Guide](#).

- Repeat Steps 3-4 to create additional custom field values for your selected custom field name.
- Repeat Steps 1-5 to add custom field values for your remaining custom field names.

This completes the procedure.

Accessing Client Policy to Enable Custom Fields

- Verify that **SETTINGS** is selected within the Main menu.
- Select **CLIENT POLICY** within the **SETTINGS** section as necessary.
- Locate Custom Fields within the External Guest Users section.
TIP: If External Guest Users is not visible, click **Choose Settings** and verify that the **External Guest Users** option is enabled including all children and click **OK**.
- Select the **Custom Field Names** you want to enable for the External Guest Invites. For example, select Region.
- An empty check box appears within the **Required** column.
- Enable the second check box to make the selection mandatory.
- Repeat Steps 4-6 for each custom field name that is required on an External Guest invite form.

This completes the procedure.

FOR JUST-IN-TIME TRAINING MATERIALS:

<http://librestream.com/training-deployment-adoption-materials/>

FOR SUPPORT:

<http://librestream.com/onsight-support/>