

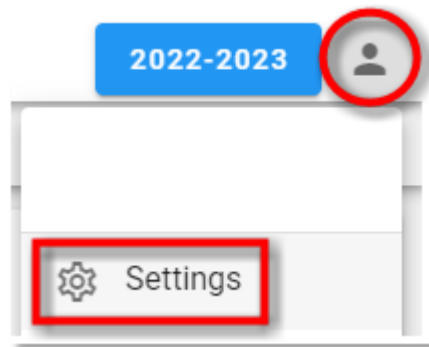
## Creating Custom Fields on the Trip Request Form

You can add custom fields for information that doesn't fit into the pre-built Trip Request Form.

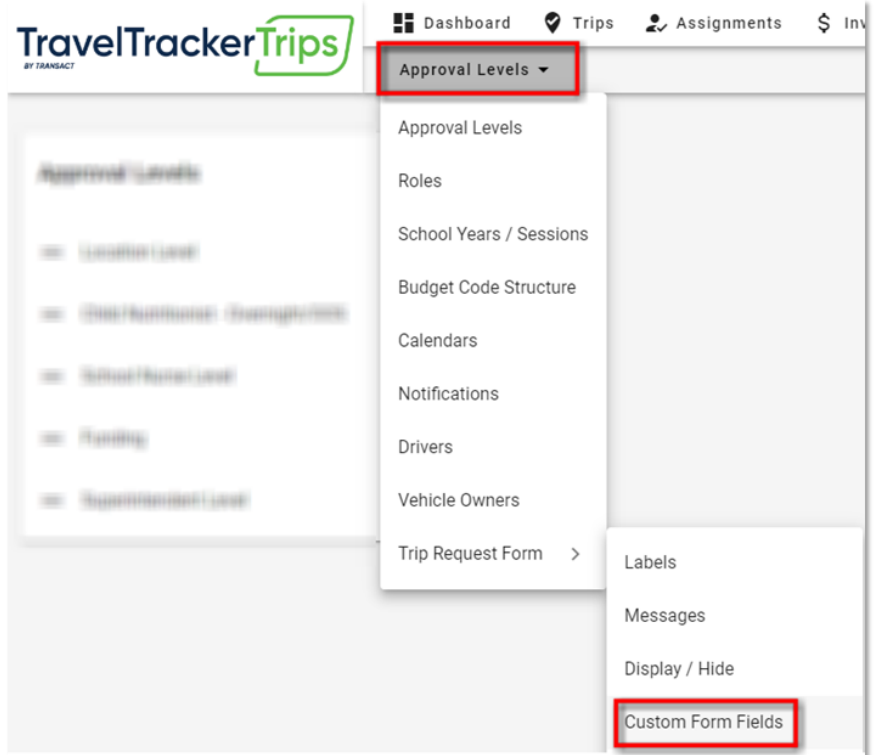
### Creating a Custom Field

To create a custom field for the Trip Request Form, click in the top right-hand corner of your webpage, where you see the half-person icon.

From the dropdown menu, select settings.

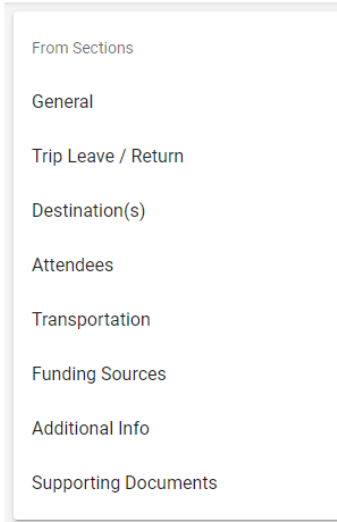


On the left-hand side of the settings page, use the dropdown menu to select "Trip Request Form" and then "Custom Form Fields."

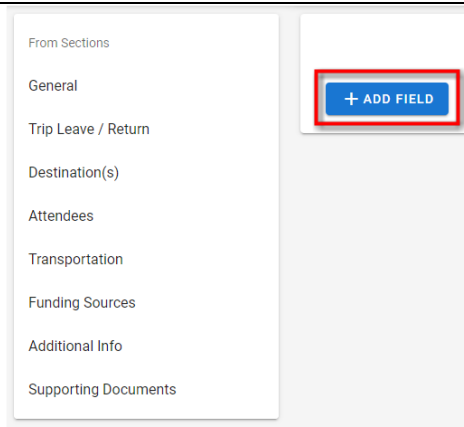


You can add custom fields to any section of the trip request form.

Click on the name of the sections you want to add a Custom Field to.



Next, click the “+ Add Field” button to the right of the section list.

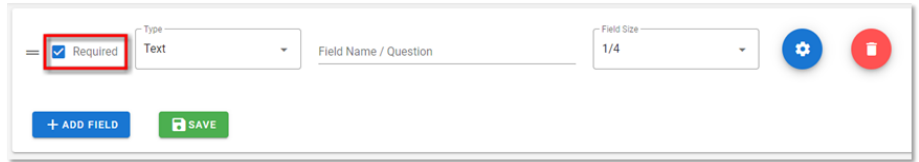


The screenshot shows a vertical list of sections on the left side of a panel. The sections are: From Sections, General, Trip Leave / Return, Destination(s), Attendees, Transportation, Funding Sources, Additional Info, and Supporting Documents. To the right of this list is a grey rectangular area containing a blue button with a white plus sign and the text '+ ADD FIELD'. The button is highlighted with a red rectangular border.

*Continue to the next page to learn about field types.*

*Required*

Custom Fields can be marked as required or optional. Checking the “required” box means requesters must fill out the custom field to submit their trip request.

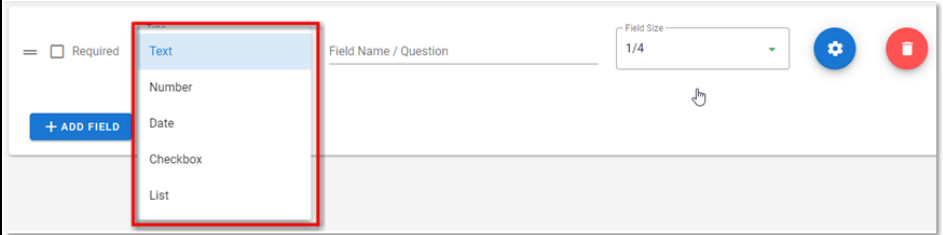


*Field Type*

You can select the field type in the “Type” Dropdown menu.

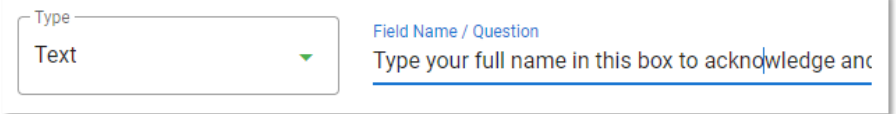
There are five options for Custom Field Type:

- Text*
- Number*
- Date*
- Checkbox*
- List*



*Text*

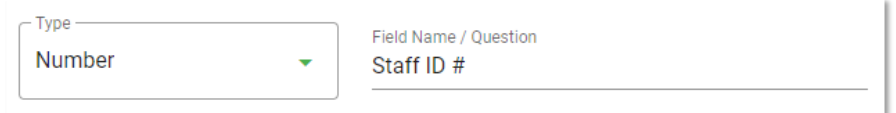
Text is a free-form box where requesters can type anything requested of them. This can be a name to acknowledge requirements or information that won't easily fall into the other categories.



*Number*

This option allows the requester to enter quantities for any requested information. This can include Staff IDs, additional phone number information, etc.

Only numbers can be typed in this field.



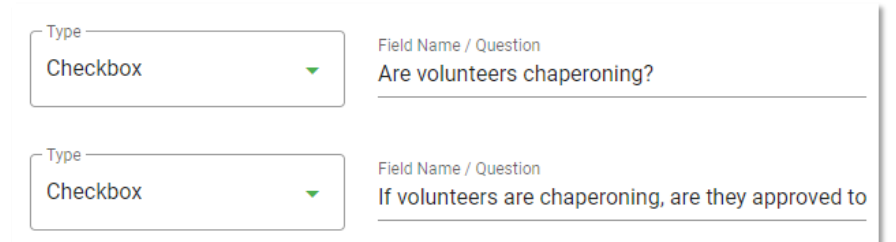
*Date*

This field is for requesters to enter a specific date., like when the teacher intends to provide parents with a permission slip or when that permission slip is due.



*Checkbox*

This is a true/false statement. A check means “yes/true.” No check means “no/false.”



## List

The List option lets you create a custom dropdown list of choices. Requesters can then choose from that menu to answer the question. This field type requires more steps to build than the others.

Once you've selected the list type, and titled your question, click on the gear button to the right of the field size.

This is where you define your list of items. Type a list item, then click enter. They should all appear as separate gray bubbles.

Once you've defined each item, click confirm.

Type: List

Field Name / Question: Choose Overall Funding Source

Type: List

Field Name / Question: Choose Overall Funding Source

Field Size: 1/4

Custom Field Settings

Choose the items for the following type:

- All
- Address
- Computer Science
- Field Trip
- General Class
- General Needs
- Staff
- Special Class
- Work Study

Do you want to save this configuration?

Yes  No

Add list items (type in an option then press ENTER):

County Funded State Funded Federally Funded

**CONFIRM**

## Field Name/Question

Whatever label you type here is what the requester will see on the form.

Make sure the description or question is clear.

Required

Type: Text

Field Name / Question

Field Size: 1/4

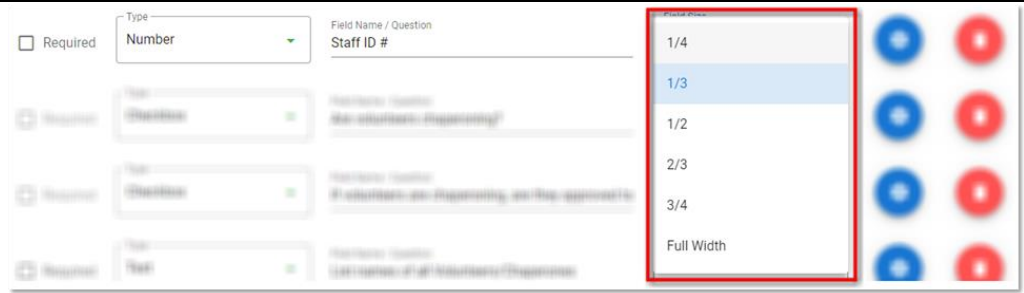
### Field Size

This setting determines how large the question appears for your requesters.

For shorter questions, smaller sizes are acceptable. If your question is longer, you may want to choose  $\frac{1}{2}$  up to Full Width.

The fraction indicates how much of the width of the page the question will take up. " $\frac{1}{4}$ " is the smallest, while "Full Width" takes the entire width of the page.

You can save and test each option if you aren't sure what works best for your questions.



### 1/4 Field Size

Staff ID #

### 1/3 Field Size

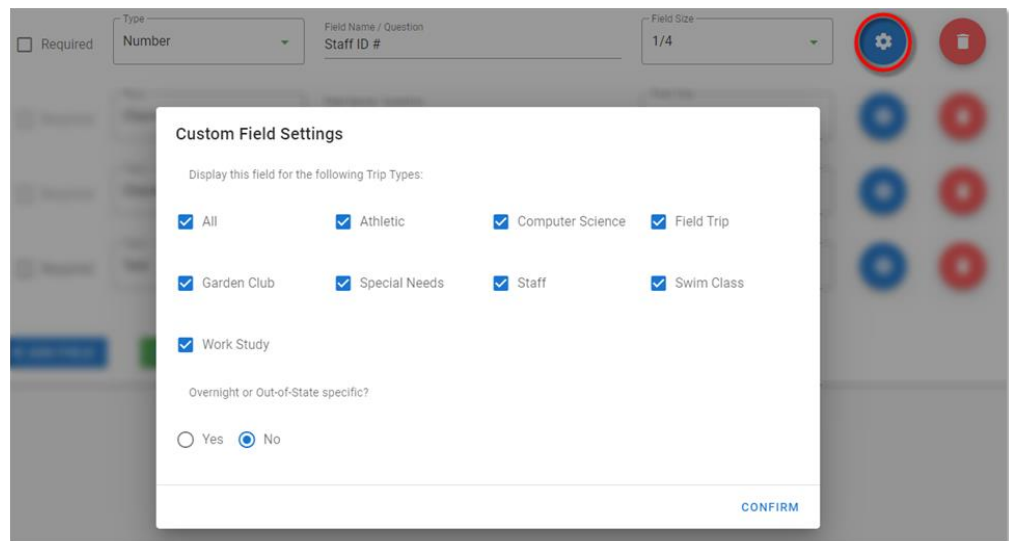
Staff ID #

### Settings

The gear button next to the Field Size dropdown menu is where you determine additional settings for your custom questions.

You can display the question for only specific trip types or make the question specific to Overnight or Out-of-State trips.

If you've enabled the list field type, this is also where you define your list items.



### Save

After defining all criteria for your custom fields/questions, click save.

+ ADD FIELD

SAVE

### Deleting a Custom Field

If you created a custom field and want to delete it, click the red trash can on the far right of the screen. Click “save” when you’re ready to delete the field permanently.

The screenshot shows a form configuration interface. On the left, there is a checkbox labeled 'Required'. Next to it is a dropdown menu labeled 'Type' with 'Number' selected. To the right is a text input field labeled 'Field Name / Question' containing 'Staff ID #'. Further right is another dropdown menu labeled 'Field Size' with '1/4' selected. On the far right, there are two circular icons: a blue gear icon for settings and a red trash can icon for deleting the field.

### Requester’s point of view for Text:

As stated, this is a freeform text box where requesters can type any information.

The screenshot shows a text input field with a light gray background. The text inside the field reads: "Type your full name in this box to acknowledge and agree to all student safety protocols for your school district." Below this text, the name "Teacher Stevenson" is typed into the field.

### Requester’s point of view for Number:

Only a number can be typed into the custom field.

The screenshot shows a number input field with a light gray background. The text inside the field reads "Staff ID #". Below this, the number "12345" is typed into the field. A blue underline is visible under the number.

### Requester’s point of view for Date

The date form field has the requester select the date from a calendar.

The screenshot shows a date selection interface. On the left, there is a text input field with a calendar icon and the text "Date Permission Slips Due from Parents/Guardians". Below this, the date "Mon, Mar 27, 2023" is displayed. On the right, a calendar for the year 2023 is shown, specifically for the month of March. The date "20" is circled in blue. At the bottom of the calendar, there are two buttons: "CANCEL" and "OK".

Requester's point of view for Checkbox

Checkboxes are great for simple Yes/No questions.

Are volunteers chaperoning?

If volunteers are chaperoning, are they approved to volunteer?

Requester's point of view for List

Select Overall Funding Source  
County Funded

- Select Overall Funding Source
- County Funded
  - State Funded
  - Federally Funded