

Additional Features

For more info and diagrams go to <https://knowledge.groop.com/>



1. Custom Fields
2. Labels

Custom Fields

Adding custom fields enables you to add specific information against an individual that isn't available otherwise. You can add customisable fields to both people and events.

- Click the **Custom fields** tab from the left-hand side bar
- Once at the customisable fields you can then choose which type of customisable field you would like to create or edit. **User** or **Event**.
- Click **Create new custom field area** the in your chosen area. A new field will appear, here you can change the **Title** by clicking the **pencil** icon and delete the existing text by clicking the **X** icon.
- Add a new field to this by clicking **Create new field**
- Upon clicking this you will see this pop up here you can give field a title e.g. DBS Certificate, Shoe Size, Days Available etc.
- Depending on your **Field Title** this will determine the **Field Type** that you will choose.

You have a number of **Field Types** to choose from;

1. **Text** - This is a small text box for 'shorter' written answers
 2. **Text area** This is a larger text box so that more detail can be added
 3. **Number**- This is a number picker e.g. Shoe Size 9.5
 4. **Date Time Picker**- This allows you to pick dates and times
 5. **Select** - This is just a single select option e.g. Yes or No
 6. **Multiple Select** - This allows you to select multiple options from your created list e.g. I can volunteer on Monday, Wednesday and Sunday.
 7. **File** - This allows you to upload a file e.g. safeguarding certificate, Qualifications.
- Once you have completed your chosen options then you can click **Create New Field**
 - If completed correctly your new field will show in your **Customisable Fields**
 - You can also see your finished **Customisable Fields** in the area that you created it under i.e. within People or Events
 - To edit any of your **Custom Fields** simply look for the **pencil** icon. This will enable you to change the **Title** and the **Field Type** once you have amended your fields simple click **Save Field**

Groop Knowledge Base article - <https://knowledge.groop.com/customisable-fields>

Labels

Labels and label categories can be applied to People, Events and Invoices to make them easier to find, use and report on.

Creating Labels

- To create a label, go to the left-hand side panel and select **Labels**
- Choose which type of label you would like to create from **User**, **Event** or **Invoice** and click **Create Label**
- Here you can add necessary details and then click **Create Label**

Applying labels

You can use the labels that you have created in the three different areas of the platform **People, Events** and **Invoices**.

Below is an example of the labels used in **People** section but is the same principle for the other two areas.

1. Click on a person's record you wish to apply the label to and choose **Edit**. This will be done within the **People** area.
2. Scroll to the labels section and click the **Add Label** box
3. Start typing the name of the label you wish to apply; a drop-down choice will appear as you type. The more characters typed the less choices will be available.
4. Select the label(s) you wish to apply and click **Update User** (You can add as many labels to a **User, Event or Invoice** as you like).

Groop Knowledge Base article - <https://knowledge.groop.com/labels>