

How To Create Custom Categories And Fields For A School In CrownSIS

Creating custom categories and fields in CrownSIS allows you to store and manage school-specific information tailored to your unique needs. Here's a step-by-step guide on how to create custom categories and fields for your school.

Step 1: Access the School Fields Settings

1. Log in to your CrownSIS account.
2. From the navigation panel, go to **Settings**.
3. Under the **School** header, select **School Fields**.

Here, you'll see the existing categories like **General Information** and **Wash Information**.



Step 2: Add a New Category

1. Click on "Add Category":

- At the top of the categories list, click the **Add Category** button.



1. Enter Category Details:

- A modal will open where you'll need to input the **Category Name**.
- Enter the **Sort Number** to determine the order in which this category will appear in relation to other categories.



1. Submit the Category:

- Once you've entered the details, click **Submit** to add the new category.

Step 3: Add Custom Fields to the Category

1. Select the Category:

- Click on the name of the category you just created.

2. Click on "Add New Field":

- In the top right corner, click the **Add New Field** button.



1. Enter Field Details:

- **Field Name** : Enter the name of the field.
- **Field Type** : Select the field type from the dropdown menu. Options include checkbox, radio button, textbox, or simple text field.
- **Default Value** : If the field requires a default value, enter it in the **Default** field.



1. **Configure Field Options:**

- **Required** : Toggle this switch to make the field mandatory for users.
- **Hide** : Toggle this switch if you want to keep the field hidden from the form.
- **All Schools** : Toggle this switch to make the field visible in the form for all schools.



1. **Submit the Field:**

- After filling in the necessary details, click **Submit** to add the new field.

Step 4: Verify the New Category and Fields

- After creating the category and fields, go back to the **School Information** section under **Schools** and check if the new category appears in the navigation submenu.



By following these steps, you can easily create custom categories and fields that suit your school's specific requirements, allowing you to manage information more effectively in CrownSIS.

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