

Kahua User-Defined Fields User Guide

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Overview

Kahua’s User-Defined Fields feature allows Domain Administrators to add new fields to their applications from directly within the user interface (UI). This feature is enabled by Kahua Support on an app-by-app basis.

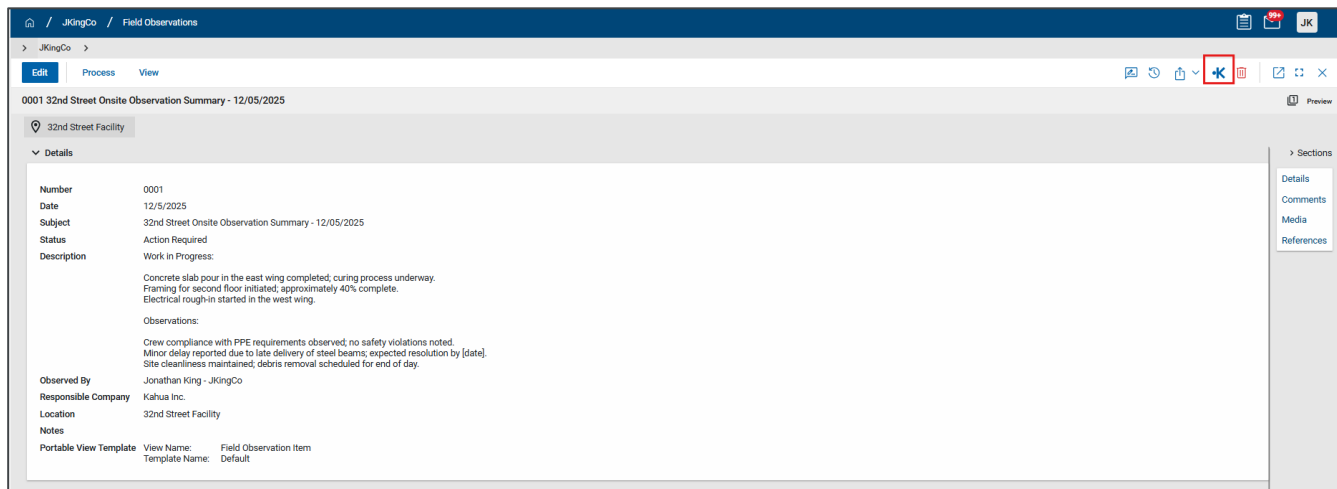
Permissions

The User-Defined Fields (UDF) UI is only accessible by Domain Administrators and applies to the application at the domain-level.

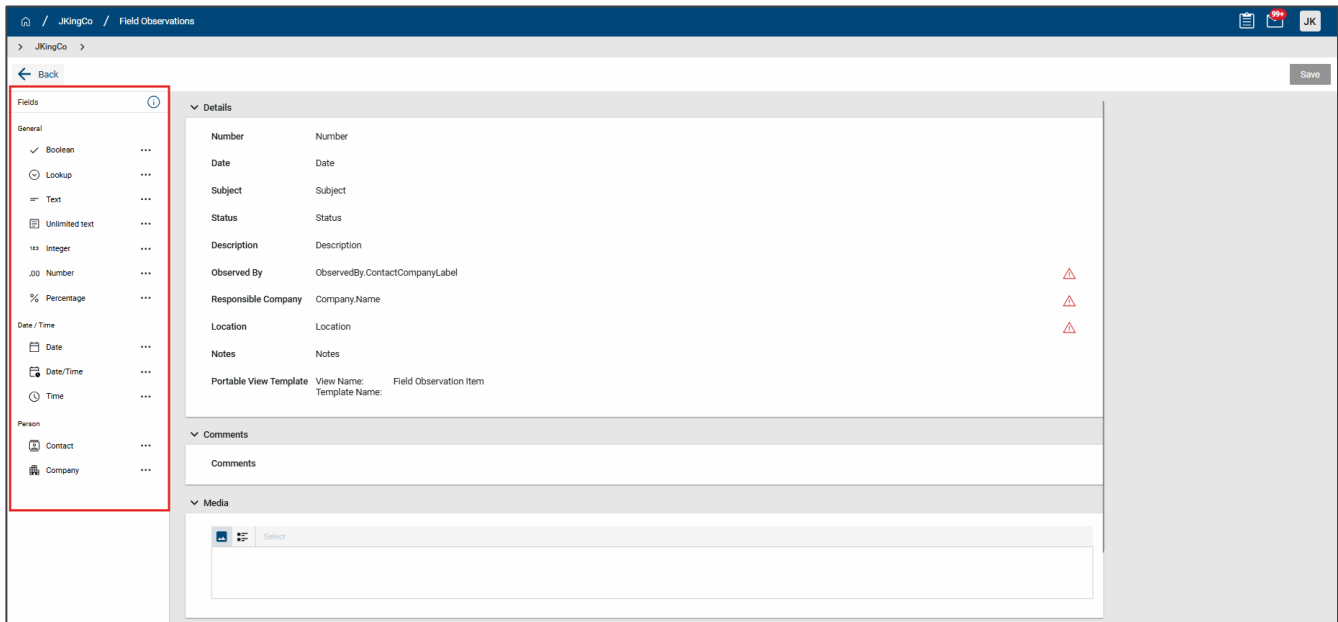
Using User-Defined Fields

Adding a User-Defined Field

Domain Administrators can access the UDF UI for an app by clicking the **K** icon in the top right corner of the record.

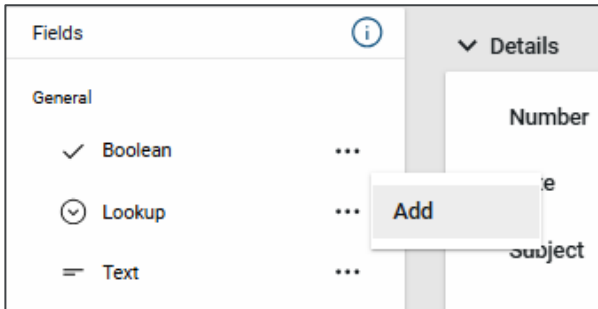


This opens the UDF UI, which displays the **Fields** panel, including a set of field types that can be added to the application. The current list of supported field types are **Boolean, Lookup, Text, Unlimited Text, Integer, Number, Percentage, Date, Date/Time, Time, Contact Select, and Company Select.**



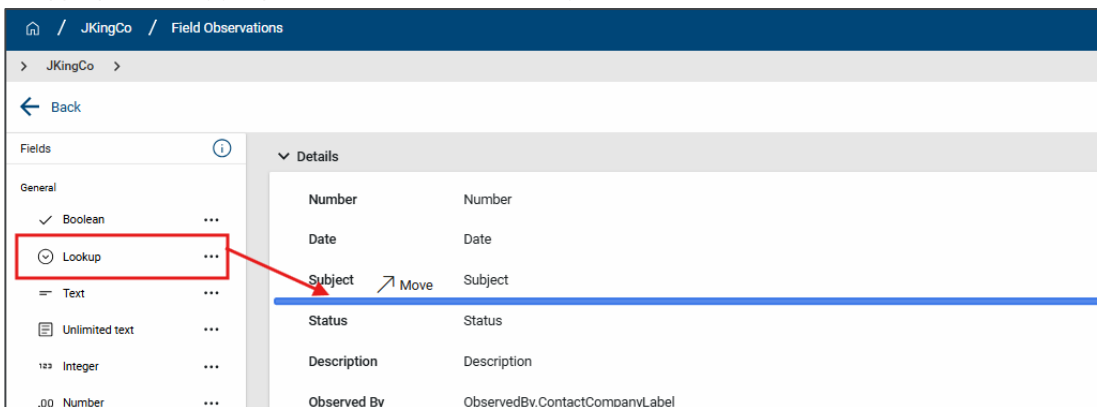
Users can add a new field to the application in two ways:

1. Click the context menu (three dots) next to the field type, then click **Add**



- a. This will add the field to the bottom of the **Details** section of the application, by default.

2. Dragging and dropping the field from the **Fields** panel onto the form.



a. This allows you to add the field to a specific place on the form.

- i. **Note:** If a field is marked with a red warning indicator, a new UDF cannot be placed in next to it.



a new UDF cannot be placed in next to it.

Properties Panel

Once a UDF has been added, the UDF **Properties** panel is displayed.

The screenshot shows a software interface with a 'Details' panel on the left and a 'Properties' panel on the right. The 'Details' panel lists various fields: Number, Date, Subject, Status, Description, Observed By, Responsible Company, Location, Notes, and Portable View Template. The 'Subject' field is highlighted with a blue border and contains 'LookupField1'. The 'Properties' panel is titled 'LookupField1 (Lookup)' and contains fields for 'Label' (LookupField1) and 'Name' (LookupField1). There is a 'Required' checkbox which is unchecked. Below these fields is a 'Values' section with a list of values and an 'Add' button. A red box highlights the 'Properties' panel title. At the top right of the interface, there is a 'Save' button and a 'Unsaved changes' indicator.

This allows the users to:

- Define the **Label** and **Name** of the UDF
 - The **Name** will be auto-generated based on the label
 - The **Name** field must be unique. The update cannot be saved if a duplicate **Name** exists
- Mark the UDF as required
- Define lookup values for **Lookup** type UDFs

Unsaved changes Save

Properties

LookupField1 (Lookup)

Label
Weather Conditions

Name
WeatherConditions

Required

Values

- ⋮ [edit] [copy] [delete]
- ⋮ Clear [edit] [copy] [delete]
- ⋮ Moderate Cloud Coverage [edit] [copy] [delete]
- ⋮ Heavy Cloud Coverage [edit] [copy] [delete]
- ⋮ Light Rain [edit] [copy] [delete]
- ⋮ Heavy Rain [edit] [copy] [delete]

+ Add

Moving a User-Defined Field

Users can move UDFs on the form and between sections, depending on the configuration of the application. To move a field, users Click on the UDF and drag it to its new position.

Details

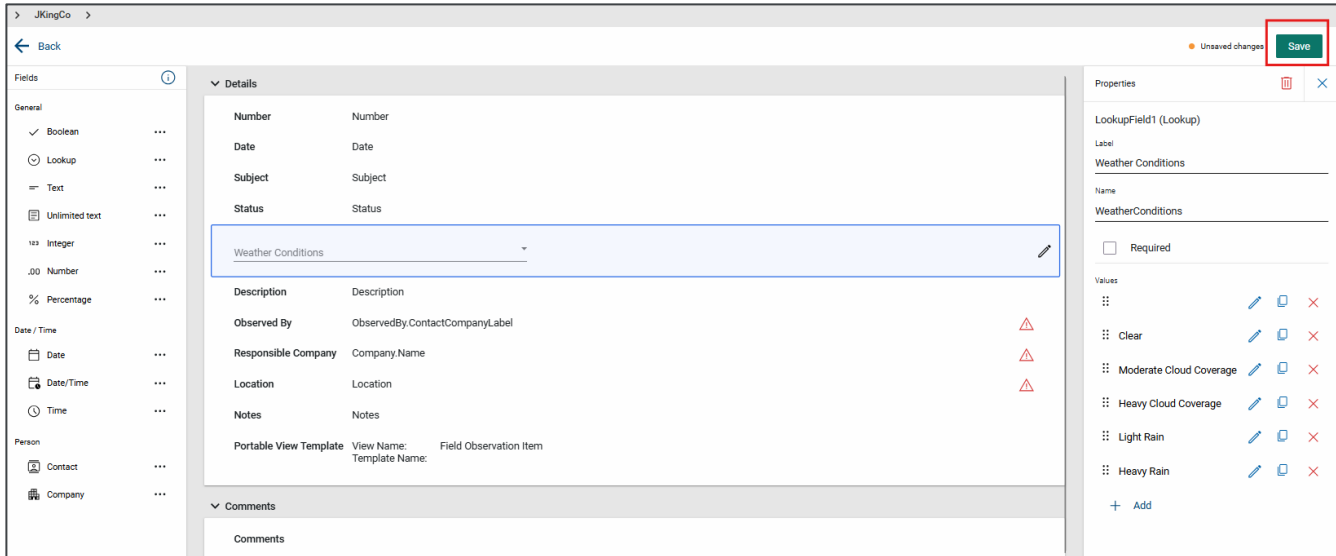
| | |
|---------------------|--------------------------------|
| Number | Number |
| Date | Date |
| Subject | Subject |
| Weather Conditions | |
| Status | Status |
| Description | Description |
| Observed By | ObservedBy.ContactCompanyLabel |
| Responsible Company | Company.Name |
| Location | Location |
| Notes | Notes |

Portable View Template View Name: Field Observation Item

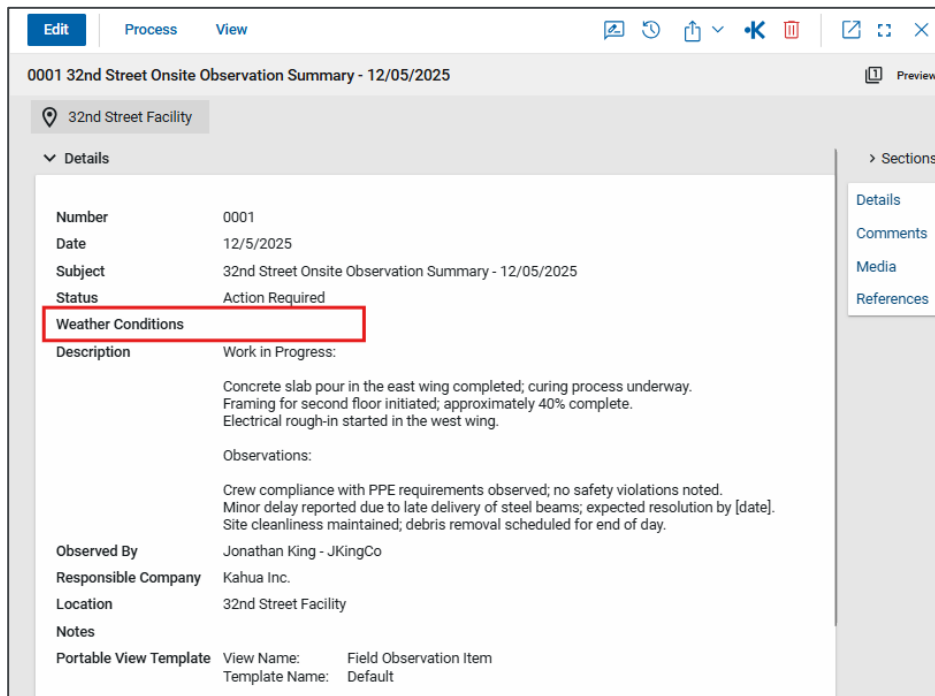
As previously mentioned, UDFs cannot be placed next to fields with the warning indicator. Additionally, non-UDFs cannot be moved on the form. Fields that are editable (UDFs) are indicated by the pencil icon.

Saving a User-Defined Field

Once the updates are complete, users click **Save**.

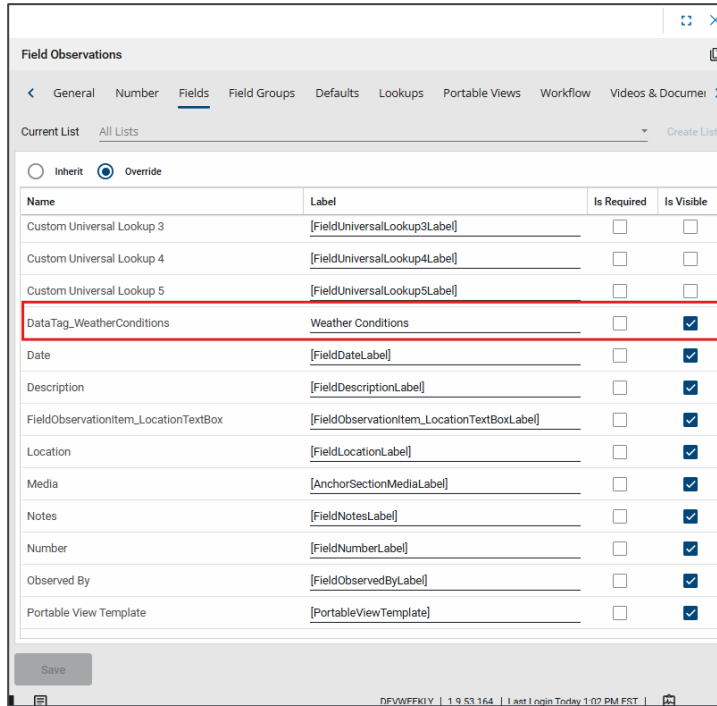


Saving this will close the application in Kahua, in order for all changes to properly persist. If the user navigates back to the application, the field is visible on the record. UDFs are added at the domain level, regardless of the partition/project in which change is made.



Configuration

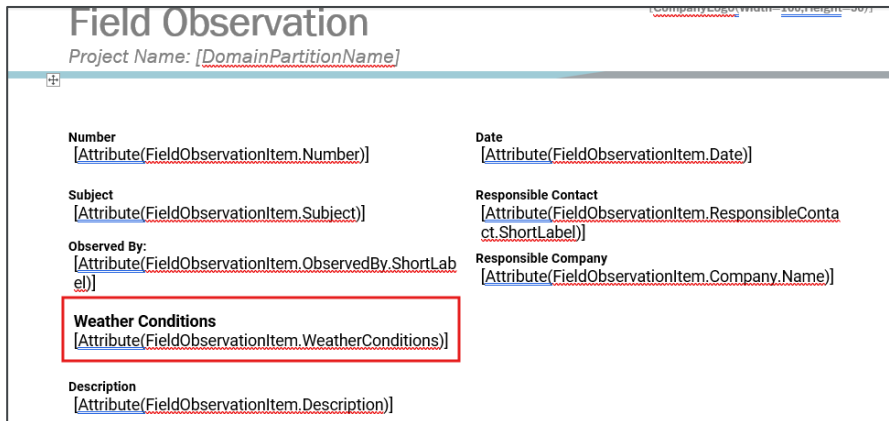
Once a UDF has been added to an application, it appears in **Configuration** under the **Fields** section as `DataTag_[FieldName]`.



Similar to other fields in Kahua, UDFs can be marked as **Is Required** and/or **Is Visible** at the partition/project level.

Portable Views

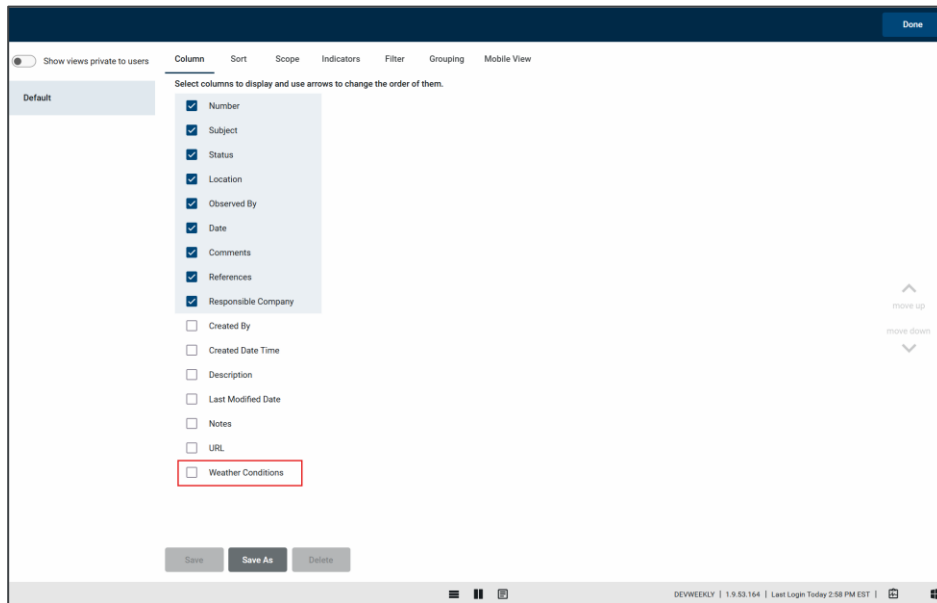
Portable View tokens are automatically generated for UDFs. The naming convention for the UDF token follows the pattern of the application. For example, the “Weather Conditions” field in the **Field Observations** application (example above) would have the token `FieldObservationItem.WeatherConditions`.



Note: Currently, the token is not displayed in the **Template Tokens** section of **Configuration**.

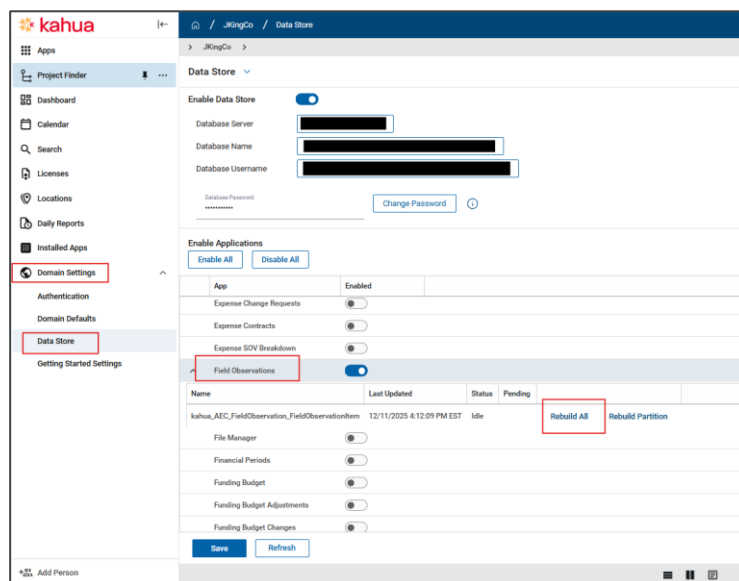
Log Views

By default, UDFs are available to users when creating custom log views. However, UDFs are not automatically added to the Default view. UDFs must be added to a new or existing custom log view as an additional step.



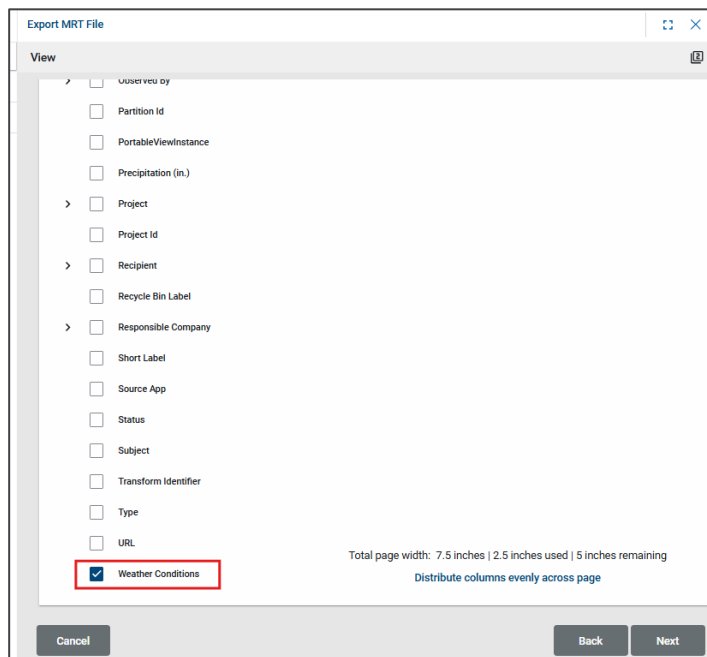
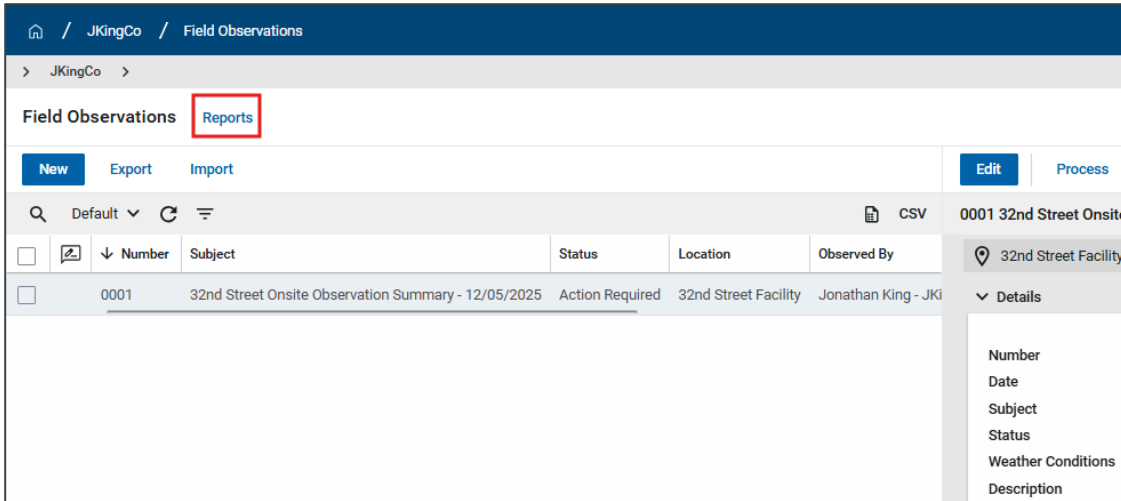
Data Store

UDFs are automatically available in the Kahua Data Store. The application does need to be rebuilt in the data store prior to it populating. This can be done in **Domain Settings** → **Data Store**.



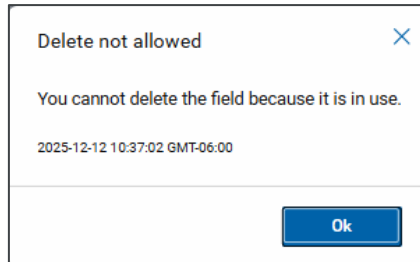
Reports

Since UDFs are automatically added to the data store, they are also available in reporting. If creating or editing a report using the Kahua Report Wizard, the field appears in the **Columns** tab of the wizard.



FAQs

- I made a mistake – can I edit or delete my UDF?
 - *Yes – UDFs can be edited within the UDF UI or in Configuration. The data type of a UDF cannot be changed.*
 - *UDFs can be deleted prior to saving. Additionally, they can be deleted from the Edit or Preview view, as long as no data is populated for it on a record. If data exists, users will see the error message below. The field can be hidden, however, using Configuration*



- Can I make a UDF only editable to some users, but view only to others?
 - *This requires more advanced logic that is available in kBuilder.*
- Can a user add a UDF only to a specific project?
 - *No – UDFs apply to the application at the domain-level. If a UDF is not needed at a certain level of the project hierarchy, it can be hidden in Configuration, like other fields.*
- When I add a UDF, does it get applied to all views in the application?
 - *By default, UDFs only apply to the New/Edit and Preview views of the application. This functionality could be expanded in the future.*