

# **SITE [iō] CAPTURE**

**Portal Admin Guide  
Estimating and Renovation Management**

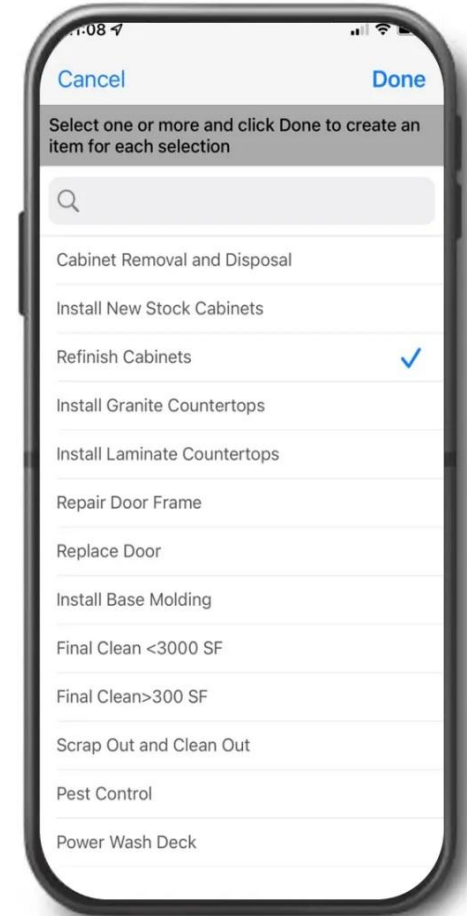
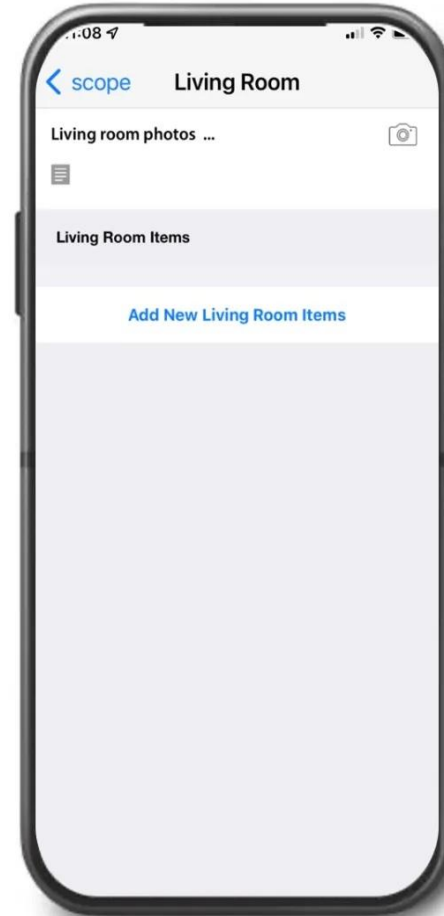
# Managing Renovations and Light Construction Using SiteCapture Estimating Features

**SITE|CAPTURE**

When you combine dynamic field groups with FotoNotes' service line database feature – you can build quotes, scopes or do other cost estimating that will automatically calculate based on the input of things like units (e.g., square feet, each, cubic yard).

By simply pressing a button on the app, a field user can quickly add services or repairs, without needing a predetermined field for that information.

This information can then be compiled in a FotoNotes PDF report or in our Manage Items feature.



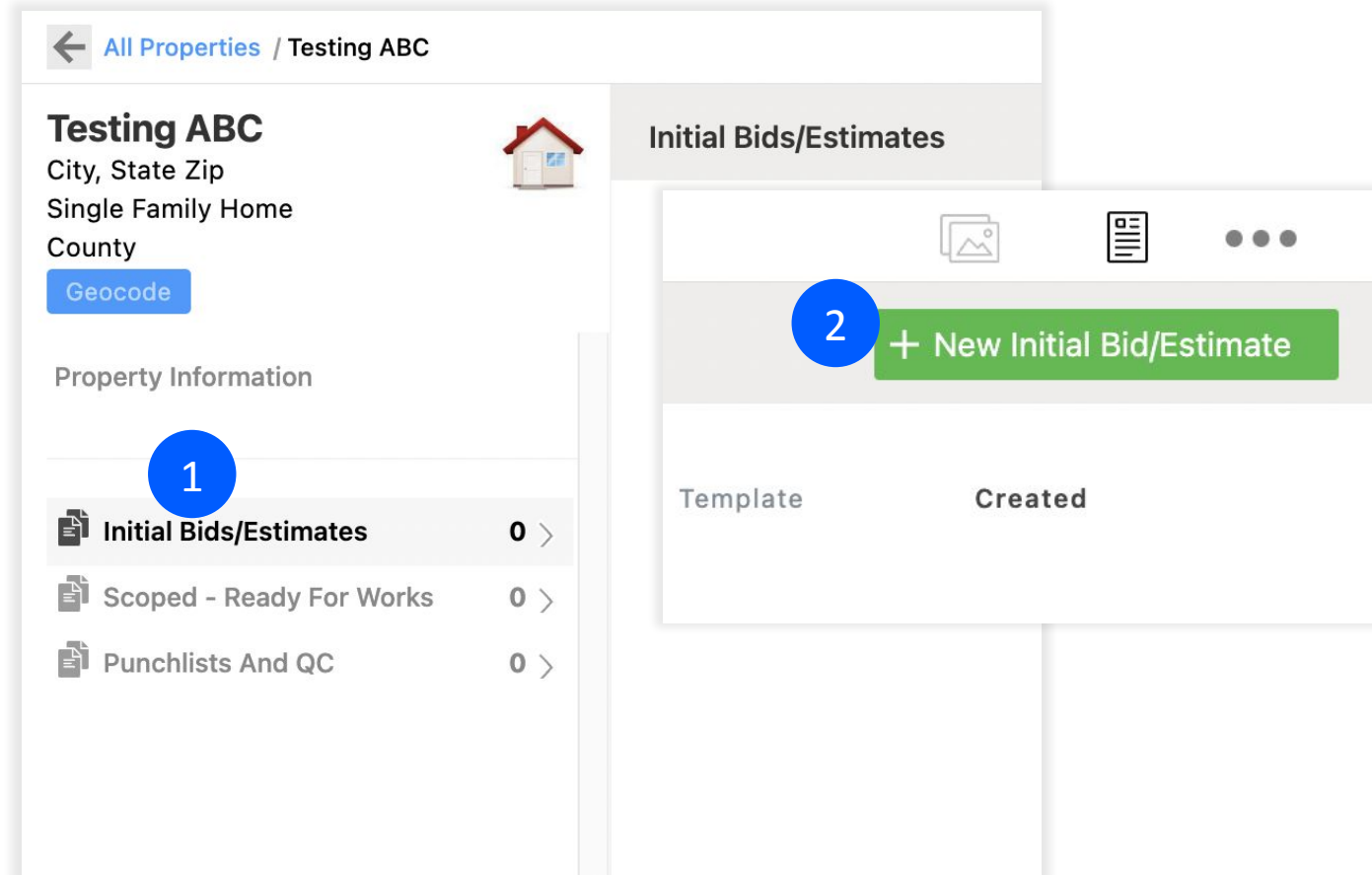
**Estimating**

# Review the Set of Estimating Templates

We have provided example estimating templates in your portal. Before you create your own estimating experience in SiteCapture, start by creating a project from one of the templates we have provided, like the Initial Bid/Estimate.

- To review, create a project from the template provided. Click on Properties in the top toolbar in your SiteCapture portal.
- Locate a test property or create a test property. Learn more about property containers below.
- Once the property is created, click into the property and click the Estimating link on the left (it will say something like Initial Bids/Estimates) (1).
- Click the green +New button on the right to create the new estimate (2). Review the project on the web app and assign it to a test field user to review on mobile.

Check out the entire Estimate>Scope>Punch process we've set up in your SiteCapture portal in this quick video: [Estimating in SiteCapture](#)



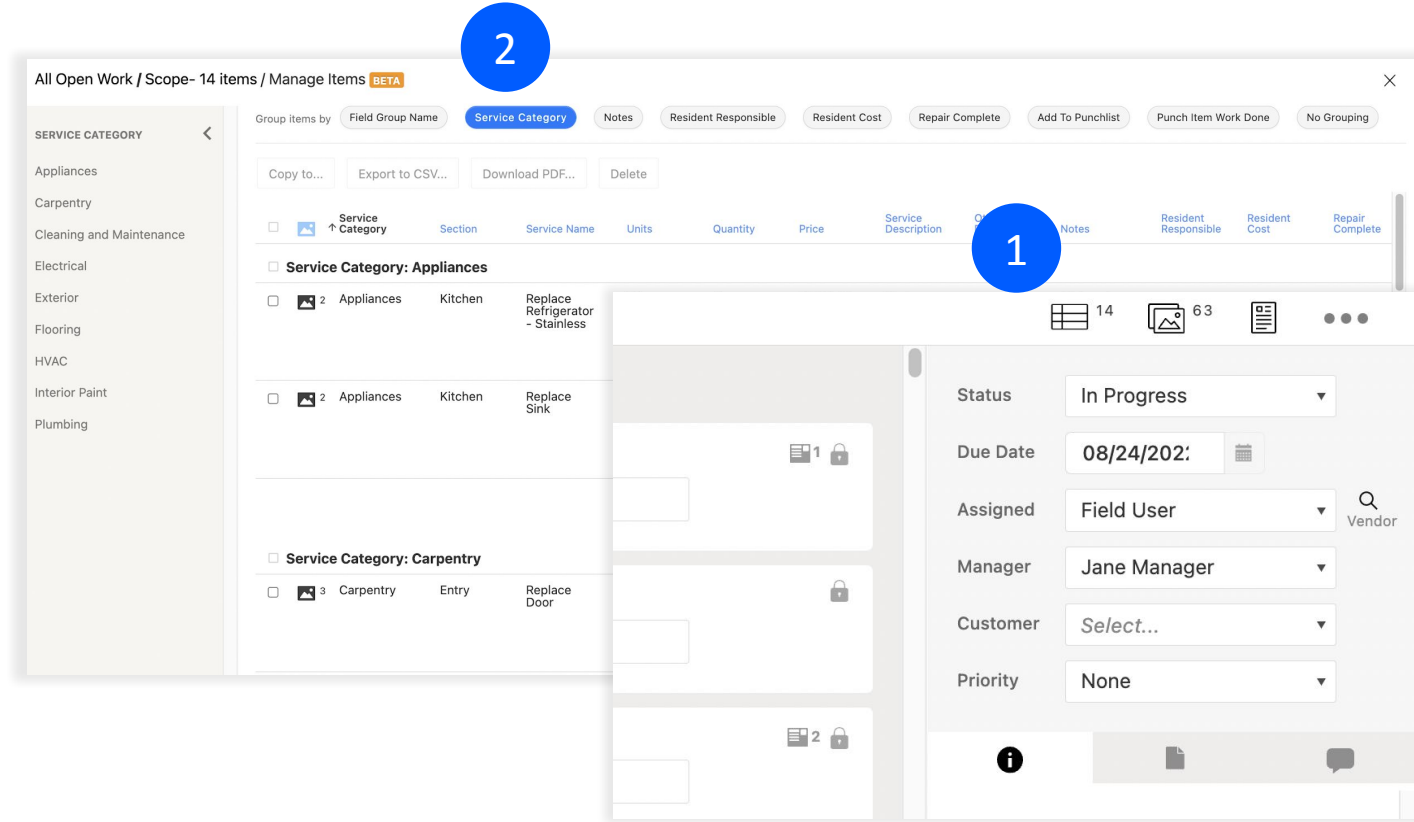
# Review the Manage Items Feature & Report Columns

After creating and completing a project from the example estimating template, review the Manage Items feature. The Manage Items feature allows Portal Admin and Manager users to view items in a more compact table form, group and sort items based on the report columns they have set up, and multi-select many items and take actions on them (Export to CSV, Download a PDF, View item photos and view subtotals for groups).

- Click the Manage Items feature icon in the top right of the estimating project (1).

Here you will see a table of all the service items in your project. You can group these by report columns that have been set in your portal and connected in your template (2). You can also edit items and view item photos directly from the Manage Items feature page.

[Manage Items Article](#)



# Review the Manage Items Feature & Report Columns

- Click any report column at the top of the Manage Items page to "Group by" that report column.
- Then, simply click a value in the left column to quickly jump to the set of service items with that value.
- You can select those specific items and copy them to a new report, export them, and more!
- Be sure to closely review the Group Items by buttons as these are the report columns set up in your portal (1). Are there new columns you need here? We will review this in more detail in a following slide.
- Report columns are set on dynamic fields in a field group. For example, if you have a field in every dynamic field group is that "Item Complete?", you can also have a report column like "Repair Complete" and have that set on every Item Complete? Field (2).

[Manage Items Article](#)

The screenshot shows the 'Manage Items' interface. At the top, there are buttons for 'Group items by' with options: 'Field Group Name', 'Service Category', 'Notes', 'Resident Responsible', 'Resident Cost', and 'Repair Complete'. A blue circle with the number '1' highlights the 'Repair Complete' button. Below this is the 'Edit Field' modal. The modal contains the following fields and options:

- Field Name: Item Complete?
- Description: Description
- Field Key: entry\_repair\_complete
- Field Type: Boolean
- Validation Type: Neither photos nor explanatory comments are
- Workflow field: No Special Logic
- Report Column: Repair Complete
- Default Value:  Yes  No
- Options:
  - ★ Required
  - Admin Only
  - Photos Allowed
  - Comment Allowed
  - Copy this when copying projects
  - Display in field group header
- Conditions: Display when [ ] is
- Visibility options:
  - Always hide from Customer
  - Always hide from Field User

A blue circle with the number '2' highlights the 'Comment Allowed' option. At the bottom right of the modal are 'Cancel' and 'Save' buttons.

# Build Your Service Database in FotoNotes

- Your Service Database is a catalog of all your services defined by categories.
- FotoNotes has provided you a demo database that must be replaced with your own catalog of services.
- You will be able to export the demo database and use that as a guide for creating your own service database.

The screenshot shows the 'Services' management interface in FotoNotes. At the top, there are buttons for 'Import Services...', 'Export Services...', and 'Add A Service'. A search bar is present with the placeholder 'Enter 2 characters...'. The table below lists several services with their respective keys, categories, tags, and costs.

Service	Service Key	Category	Tags	Market	Labor Cost	Material Cost	Unit Cost	Default Qty	Unit
Window Screen Repair	fn96	Interior	Windows		\$0.00	\$0.00	\$42.00		EA
Vacuum Carpets	fn60	Flooring	Carpets		\$0.00	\$0.00	\$12.50		RM
Sump Pump Inspection	fn25	Cleaning and Maintenance	Sump Pump		\$0.00	\$0.00	\$210.00		EA
Structural Inspection Report	fn113	Structural	Inspection		\$0.00	\$0.00	\$500.00		EA
Structural Engineer Report	fn112	Structural	Inspection		\$0.00	\$0.00	\$975.00		EA
Steam Clean Carpets	fn59	Flooring	Carpets		\$0.00	\$0.00	\$40.00		RM

# Export the Demo Database

- To export the demo database, navigate to the Service Database page by clicking the admin gear in the top right and selecting Services.
- Click Export Services on the left (1). This will download a .csv file of the demo services to your computer.
- You will use this file to build your own database, filling in the columns using the instructions on the following slides. \*Your file must remain a .csv format (2).

ces
Import Services...
Export Services...

Service	Service Key	Category
Laminate Flooring	fn65	Flooring
Exterior Paint	fn48	Exterior Paint
Electrical Rewire	fn32	Electrical
Repair Foundation Crack	fn111	Structural
Clean <3000 SF	fn19	Cleaning and Maintenance

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	name	key	unit	unit_cost	unit_labor_cost	unit_material_cost	can_set_cost	can_set_qua	default_quar	description	category	market	tags	
2	Backfill, Seed and Blanket	fn37	SqFt	24	15	9	TRUE	TRUE	1	Backfill, seed	Exterior		Landscape	
3	Build Exterior Deck	fn33	SqFt	25	15	10	TRUE	TRUE	1	Measure and	Exterior		Decking	
4	Build New Concrete Driveway	fn35	SqFt	9.5	0	0	TRUE	TRUE		Install new c	Exterior		Driveway	
5	Cabinet Removal and Disposal	fn11	HR	40	40	0	TRUE	TRUE	3	Remove exis	Carpentry		Cabinets	
6	Ceiling Fan	fn27	EA	175	50	125	TRUE	TRUE	1	Install new c	Electrical		Fixtures	
7	Clean and Polish Hardwood Floors	fn61	SqFt	1.75	0	0	TRUE	TRUE		Clean and po	Flooring		Hardwood	
8	Clean Furnace	fn80	EA	75	0	0	TRUE	TRUE		Turn off pow	HVAC		Furnace	
9	Clean Laminate Flooring	fn65	SqFt	0.5	0	0	TRUE	TRUE		Do a comple	Flooring		Laminate	
10	Complete Exterior Paint	fn48	SqFt	3.25	0	0	TRUE	TRUE		Paint entire	Exterior Paint		Entire Exterior	
11	Electrical Rewire	fn32	SqFt	2	0	0	TRUE	TRUE		Inspect area	Electrical		Wiring	
12	Epoxy Repair Foundation Crack	fn111	EA	650	0	0	TRUE	TRUE		Repair any fc	Structural		Foundation Repairs	
13	Final Clean <3000 SF	fn19	HR	20	0	0	TRUE	TRUE		Final clean in	Cleaning and Maintenance		Interior Clean	
14	Final Clean>300 SF	fn20	HR	15	0	0	TRUE	TRUE		Final clean in	Cleaning and Maintenance		Interior Clean	
15	HVAC Seasonal Maintenance	fn83	HR	145	0	0	TRUE	TRUE		Inspect, Clea	HVAC		HVAC-Service	
16	Install Base Molding	fn18	LF	4	0	0	TRUE	TRUE		Prep walls ai	Carpentry		Walls	
17	Install Cabinet Knobs	fn74	EA	22	0	0	TRUE	TRUE		Prep cabinet	Hardware		Handles	
18	Install Carpet	fn55	SqYd	32	4	28	TRUE	TRUE		Carpet instal	Flooring		Carpets	
19	Install Carpet Padding	fn56	SqFt	1.95	0	0	TRUE	TRUE		Install carpet	Flooring		Carpets	
20	Install Ceramic Tile	fn69	SqFt	10.5	0	0	TRUE	TRUE		Install ceram	Flooring		Tile	
21	Install Chimney Flashing	fn106	EA	426	0	0	TRUE	TRUE		Install chimm	Roofing		Flashing/Fascia/Soffit	
22	Install Dehumidifier	fn78	EA	2504	0	0	TRUE	TRUE		Installation c	HVAC		Dehumidifier	
23	Install Granite Countertops	fn14	SqFt	85	0	0	TRUE	TRUE		Install granit	Carpentry		Countertops	
24	Install Gutter Flashing	fn108	LF	3	0	0	TRUE	TRUE		Install gutter	Roofing		Gutters	
25	Install Laminate	fn66	SqFt	6.5	0	0	TRUE	TRUE		Prepare floor	Flooring		Laminate	

Export Services  
**Estimating**

# Determine Service Categories

When setting up your services, keep in mind that each service will need a category, but many services can have the same category. Your services will be connected to your estimating template by category.

For example, you may have a category for Electrical, Carpentry, Plumbing, etc.. Each of those categories can be tied into as many sections in your template as needed. You may have services with a category of Plumbing in your bathrooms, kitchen, etc..

## View Field Settings

Field Name:

Description:

Field Key:

Field Type:

Validation Type:

Workflow field:

Report Column:

★ Required

Admin Only

Photos Allowed

Comment Allowed

Service Categories (comma separated)

roofing,other

Service	Service Key	Category
Clean Laminate Flooring	fn65	Flooring
Complete Exterior Paint	fn48	Exterior Paint
Electrical Rewire	fn32	Electrical
Epoxy Repair Foundation Crack	fn111	Structural
Final Clean <3000 SF	fn19	Cleaning and Maintenance

Done



# Service Database Column Definitions

## A. Service Name - required

This is the display label for your service. When a user clicks to add a service item, these are the names that will appear when they are selecting the service. This cannot be left blank.

## B. Key - required

The Service Key is a unique key for the service. It does not display in the front-end user interface and can be any combination of letters and/or numbers, as long as it's unique for each service. This cannot be left blank.

## C. Unit - required

The Service Unit displays under the Units field. Some examples would be Square Foot, Hour, Each, or Item. count. This cannot be left blank.

## D. Unit Cost -required

Unit Cost is a dollar field. Costs should be decimal numbers without commas or dollar signs: ie: 1.25, 0.00. This cannot be left blank.

[How to populate the Services database using a csv spreadsheet](#)

Search: Enter 2 characters... Search

Service	Service Key	Category	Tags
Clean Laminate Flooring	fn65	Flooring	
Complete Exterior Paint	fn48	Exterior Paint	
Electrical Rewire	fn32	Electrical	
Epoxy Repair Foundation Crack	fn111	Structural	

+ Add A Service

1 - 20 of 114

Labor Cost	Material Cost	Unit Cost	Default Qty	Unit	
\$0.00	\$0.00	\$0.50		SqFt	
\$0.00	\$0.00	\$3.25		SqFt	
\$0.00	\$0.00	\$2.00		SqFt	

# Service Database Column Definitions

## E. Unit Labor Cost - optional

This is a dollar field. If you have a labor cost associated with the cost of a service, you can center it here. Labor and Material costs added together equal the Unit Cost. The system will not automatically update the total Unit Cost if you update a labor cost. **Costs should be decimal or whole numbers without commas or dollar signs: ie: 1.25, 0.00, 40**

## F. Unit Material Cost - optional

This is a dollar field. If you have a material(s) cost associated with the cost for a service, you can center it here. Labor and Material costs added together equals the unit cost. The system will not automatically update the total unit cost if you update a material cost. **Costs should be decimal or whole numbers without commas or dollar signs: ie: 1.25, 0.00, 40**

↑ Service	Service Key	Category	Tags	Market	Labor Cost	Material Cost	Unit Cost
Backfill, Seed and Blanket	fn37	Landscaping			\$15.00	\$9.00	\$24.00
Build Exterior Deck	fn33	Deck			\$15.00	\$10.00	\$25.00
Build New Concrete Driveway	fn35	Driveway/Walkway			\$0.00	\$0.00	\$9.50

	A	B	C	D	E	F	G	H	I	J	K	L
1	name	key	unit	unit_cost	unit_labor_c	unit_material_cost	can_set_cost	can_set_qua	default_quar	description	category	market
2	Backfill, Seed and Blanket	fn37	SqFt	24	15	9	TRUE	TRUE	1	Backfill, seed	Landscaping	
3	Build Exterior Deck	fn33	SqFt	25	15	10	TRUE	TRUE	1	Measure and	Deck	
4	Build New Concrete Driveway	fn35	SqFt	9.5	0	0	TRUE	TRUE		Install new c	Driveway/Walkway	

[How to populate the Services database using a csv spreadsheet](#)

# Service Database Column Definitions

## G. Can Set Cost - optional

This is a boolean field. Only enter TRUE or FALSE. If left blank, this defaults to TRUE. If this is set to TRUE, then users will be able to override costs. \*Portal Admins can always override a cost.

## H. Can Set Quantity – optional

This is a boolean field. Only enter TRUE or FALSE. If left blank, this defaults to TRUE. If this is set to TRUE, users will be able to override default quantities. \*Portal Admins can always override a quantity.

## I. Default Quantity- optional

If you have a default quantity set it in this column. For example, if you know you will always only need one refrigerator, put a default quantity of 1. **Default quantities should be numbers without commas or dollar signs: ie: 1., 2**

**Edit Service**

**Service Name**  
Replace Glass Door

**Service Key**  
fn93

**Description**  
Remove existing sliding glass door and replace with new door.  
This includes replacing both sides and new track.

**Category**  
Doors

**Market**  
None

**Tag**

**Set the Unit quantity and cost**

**Unit**  
EA

**Unit Cost (\$)**  
225.00

**Unit Labor Cost (\$)**  
93.00

**Unit Material Cost (\$)**  
132.00

**Default Quantity**  
1

User Can Override Costs

User Can Override Quantity

Cancel Save

[How to populate the Services database using a csv spreadsheet](#)

# Service Database Column Definitions

## J. Description

You can use a description to give more detail to the Service Name. This description will appear below the service name in the service item. Although the description is optional, we highly recommend you utilize to provide further insight or instructions for the service

## K. Category

This is the category you assign to your service, i.e. Electrical, Plumbing, Paint, etc.. You can set one category on as many services as needed, but there can only be one category per item. The category will be used in your template to connect services.

### Edit Service

**Service Name**  
Replace Glass Door

**Service Key**  
fn93

**Description**  
Remove existing sliding glass door and replace with new door. This includes replacing both sides and new track.

**Category**  
Doors

**Market**  
None

**Tag**

**Set the Unit quantity and cost**

Unit	Default Quantity
EA	1

**Unit Cost (\$)**  
225.00

**Unit Labor Cost (\$)**  
93.00

**Unit Material Cost (\$)**  
132.00

User Can Override Costs

User Can Override Quantity

Cancel

[How to populate the Services database using a csv spreadsheet](#)

# Service Database Column Definitions

**L. Market**– If you have markets set up in your SiteCapture portal, you can set up market-based service pricing. This column should contain a valid "market\_key". In a project that has a particular market set, the services shown will be the ones that match that market, plus the ones that do not have a market, and further limited according to any categories defined on the particular Service Selection field. To learn more about markets and market-based pricing, please email the SiteCapture Customer Success team. \*Learn more about Markets and Regions in an upcoming slide.

**M. Tags** – ignore this column and leave blank

**Edit Service**

**Service Name**  
Replace Glass Door

**Service Key**  
fn93

**Description**  
Remove existing sliding glass door and replace with new door. This includes replacing both sides and new track.

**Category**  
Doors

**Market**  
✓ None  
Market 1

**Tag**

**Set the Unit quantity and cost**

Unit	Default Quantity
EA	1

**Unit Cost (\$)**  
225.00

**Unit Labor Cost (\$)**  
93.00

**Unit Material Cost (\$)**  
132.00

User Can Override Costs

User Can Override Quantity

Cancel Save

# Import Your Services

1. Once you have finalized and correctly formatted your service database .csv file, you can import it into your SiteCapture portal.
2. From the Services page click on the Import Services button on the left.
3. Select the .csv file you've created and saved on your computer. Press the blue import button.
4. This will import your services (1).
5. If there are any errors in your .csv file, they will appear after you click Import. Your services will not be imported, and you will need to fix the errors and try again (2).
6. Need assistance importing your service database? Email [support@sitecapture.com](mailto:support@sitecapture.com).

[Importing Services](#)

The screenshot shows the 'Services' page with the 'Import Services...' button highlighted. A modal dialog titled 'Import Services' is open, displaying instructions to upload a CSV file. Below the instructions is a 'Select file..' button and a confirmation that the file 'services.csv' is selected. An 'Import' button is visible at the bottom right of the modal. A second modal dialog titled 'Import Services' shows a success message: 'Successfully imported 7 services.' and a table of errors for rows 4 and 6.

Row	Errors
4	key with value [fn35] is a duplicate
6	[\$125] is not a valid cost value

# Important things to know about the service database and templates work together

- Services must be set up in dynamic field groups in your template
- There are a specific set of fields that must be included in that field group to utilize services (1). Those are:
  - Service Item (field type: service selection, workflow: Line Item Service Key).
  - Units (field type: Integer, workflow: Line Item Service Quantity)
  - Estimate (field type: Dollar Amount, work: Line Item Service Cost)
  - \*These fields can be named whatever you would like, but they must be the same field types and workflows mentioned above.
- The field group may also include fields like labor cost and material cost, but those are optional.
- Services will be connected in your template using the service categories you set up in your service database.

Field Group: Roof Items

Roof Item <i>roof_item</i>	Service Selection	★	🔒	📷	💬	📄	👤	📱	↶
Units <i>roof_units</i>	Integer	★	🔒	📷	💬	📄	👤	📱	↶
Roof Work Estimate <i>roof_estimate</i>	Dollar Amount	★	🔒	📷	💬	📄	👤	📱	↶
Roof Materials Estimate <i>roof_materials</i>	Dollar Amount	★	🔒	📷	💬	📄	👤	📱	↶
Roof Labor Estimate <i>roof_labor</i>	Dollar Amount	★	🔒	📷	💬	📄	👤	📱	↶

1

[Managing Templates Article](#)

[Connecting Services and Templates Article](#)

# Important things to know about the service database and SITE|CAPTURE templates work together

- In the service selection field(s) you will enter any category associated with services you want to display when a user clicks to add a new service item in that field group. For example, in the Exterior section of your template, you may have one field group for repair items, and that service selection field may include categories like Roof, Structural, Lawn & Maintenance, etc.
- If you want all services to display, simply add a comma “,” to the service selection field.
- You will also need one total field somewhere in your template (usually at the end of the first section). It will need to be field type: Dollar Amount, workflow: Project Cost Total
- Sub-total fields are optional. These can go in each section. The field type is: Dollar Amount, workflow: Section Cost Total.
- \*If you're using the estimate, scope, and punch list templates, be sure to make the same changes in each template.

[Managing Templates Article](#)

[Connecting Services and Templates Article](#)

**View Field Settings**

Field Name: Roof Item

Description: Description

Field Key: roof\_item

Field Type: Service Selection

Validation Type: Neither photos nor explanatory comments are

Workflow field: Line Item Service Key

Report Column: Service Key

★ Required

Admin Only

Photos Allowed

Comment Allowed

Copy this when copying projects

Display in field group header

Service Categories (comma separated): roofing,other

Conditions: Display when is

Always hide from Customer

Always hide from Field User

Done



# Create an Estimate

- You're now ready to try your new templates and connected service database!
- Just as you did before, create a new estimate by locating the property, selecting the type on the left (1), and then clicking the green button to create a new estimate (2).
- After walking through and completing the Estimate, you can create your scope and then punch projects.

Check out the entire Estimate>Scope>Punch process we've set up in your SiteCapture portal in this quick video: [Estimating in SiteCapture](#)

The screenshot displays the SiteCapture interface for a property named "Testing ABC". The breadcrumb trail at the top reads "All Properties / Testing ABC". The main header area includes the property name "Testing ABC", a house icon, and the address "City, State Zip", "Single Family Home", and "County". A blue "Geocode" button is located below the address. The "Property Information" section contains a list of project stages: "Initial Bids/Estimates" (0), "Scoped - Ready For Works" (0), and "Punchlists And QC" (0). A blue circle with the number "1" highlights the "Initial Bids/Estimates" item. A modal window titled "Initial Bids/Estimates" is open, showing a green button with a plus sign and the text "+ New Initial Bid/Estimate", which is highlighted by a blue circle with the number "2". Below the button, the modal has columns for "Template" and "Created".

# Copy your Estimate to Create a Scope

- After completing your estimate, you can use the Managed Line Item tool to review it and select items to copy from the Estimate to a new Scope.
- In the Manage Line Item tool, select the items you want to copy to your new scope by clicking the box at the top to select all (1), clicking the box above a grouping of items to select those items (2), or selecting the box next to each individual items you want to copy (3).
- Once you have selected the items you would like to copy, click the Copy to button (4).

Check out the entire Estimate>Scope>Punch process we've set up in your SiteCapture portal in this quick video: [Estimating in SiteCapture](#)

The screenshots illustrate the process of copying items from an estimate to a scope in the SiteCapture portal. The interface shows a 'Manage Items' tool with a 'SERVICE CATEGORY' list on the left and a main table of items. The items are grouped by 'Service Category' and 'Section'. The 'Copy to...' button is highlighted in blue in the first and fourth screenshots. The second and third screenshots show the selection process, with checkboxes for selecting all items, a group, or individual items.

Service Category	Section	Service Name
Service Category: Carpentry	Kitchen	Cabinet Removal and Disp
Service Category: Closet	Primary Bedroom	Install New Shelving
Service Category: Closet	Bedroom 2	Install New Shelving
Service Category: Closet	Bedroom 3	Install New Shelving
Service Category: Carpentry	Kitchen	Cabinet Removal and Disposal
Service Category: Closet	Primary Bedroom	Install New Shelving
Service Category: Closet	Bedroom 2	Install New Shelving
Service Category: Closet	Bedroom 3	Install New Shelving
Service Category: Closet	Bedroom 4	Replace Closet Shelving/Organi
Service Category: Closet	Bedroom 5	Install New Shelving
Service Category: Flooring	Kitchen	
Service Category: Flooring	Primary Bedroom	
Service Category: Flooring	Bedroom 2	

# Copy your Estimate to Create a Scope

- On the Copy to page, choose Select a different template under Choose a Template. In the type dropdown, select the Scope type. In the template dropdown, select the Scope template (1).
- Under Choose What To Copy, select to copy photos to the new project and any other options that are applicable to you (2).
- Click the blue Copy and go to the copy button (3).
- You now have a new scope project that includes only the items you selected and new fields to be completed. You can assign this work to your vendor or field user to be completed.

Check out the entire Estimate>Scope>Punch process we've set up in your SiteCapture portal in this quick video: [Estimating in SiteCapture](#)

Copy

**Choose a Template**

Use the same template

Select a different template (Only fields with matching field keys will be copied)

Filter templates by type

1 Reno Scoped

Choose template

Reno Scope

Only copy fields that have copy flag checked

**Choose What To Copy**

Copy assigned user

Copy due date

Copy tags

Copy photos to the new project

Copy only flagged photos

Copy documents

2

3

Close Copy Copy and go to the copy

# Copy your Scope to Create a Punch List

- After completing your Scope, you can follow the same steps outlined in the previous slides to create a Punch List project. Review your completed Scope items in the Manage Line Item tool. Select the items that need to be moved to a Punch List and click the Copy to button.
- On the Copy to page, when you select to copy to a different template, select the Punch List type and the Punch List template (1).
- Click the Copy and go to the copy button and you now have a new Punch List project you can assign out to your vendor or field user (2).

Check out the entire Estimate>Scope>Punch process we've set up in your SiteCapture portal in this quick video: [Estimating in SiteCapture](#)

### Copy

**Choose a Template**

Use the same template

Select a different template (Only fields with matching field keys will be copied)

Filter templates by type

Reno Punchlist

Choose template

Reno Punchlist

Only copy fields that have copy flag checked

**Choose What To Copy**

Copy assigned user

Copy due date

Copy tags

Copy photos to the new project

Copy only flagged photos

Copy documents

Close Copy Copy and go to the copy

# Customize Your Report Columns

- Report Columns pull specific information from dynamic field groups to display in the Manage Items tool and in PDF Reports. They also allow you to group by a certain report column in the Manage Line Item tool.
- They are set in dynamic fields. Some Report Columns are set by default and cannot be changed. Those include the service selection fields, unit fields, and estimate/line-item cost fields.
- Once you decide on the report columns you need, you should set the report column on the appropriate field in every dynamic field group where the field exists. For example, if you have a work notes field and you want that to show up in a “Notes” report column in a report and in the Manage Items tool, you will need to set the Notes report column on the Work Notes field in every dynamic field group where that Work Notes field exists.
- Need help adding a new report column? Reach out to your Customer Success contact to learn more.

**View Field Settings**

Field Name: Exterior Work Notes

Description: Exterior Work Notes

Field Key: exterior\_work\_description

Field Type: Long Text

Validation Type: Neither photos nor explanatory comments are

Workflow field: No Special Logic

**Report Column: Work Notes**

★ Required

Admin Only

Photos Allowed

Comment Allowed

Copy this when copying projects

Display in field group header

Conditions: Display when [dropdown] is

Always hide from Customer

Always hide from Field User

Done

# Additional Support

Visit our support site for additional support articles and videos:

<https://sitecapture.zendesk.com>

For technical support, email [support@sitecapture.com](mailto:support@sitecapture.com)