

Custom tab

Category: Getting Started | Created: March 25, 2026 | Updated: September 01, 2026

Custom tab - allows you to extend the number of fields you may have for a particular record. Custom tabs exist on a variety of both master file and transaction file maintenance screens. Below is a Driver file example.

Main	Equipment	Pay	Deductions	Notes	Contacts	Custom
Field						
Field Value		Field Date	Expire Date	Expire Check		
Liability Insurance	80-92972	1/1/2026	12/31/2026	☒		
				☐		
Add To List Remove From List						

Field - Right-click on this field to:

1. Add to List - Create a new field that will then be available to all other driver/sub custom tabs.
2. Remove from List - Remove an unused field. A custom field can only be removed if it is unused in any other driver/sub record.

Field Value - This might be a policy number, a description, or any value for this custom field.

Field Date - (Optional) - If there is an effective date related to this custom field.

Expire Date - (Optional) - If there is an expire date related to this custom field.

Expire Check - (Optional) - If checked, this field requires an Expire Date, and will be included in any notifications nearing the expire date. These will also be included in the Reports > Other Reports - Custom field Expiration Report, and the Driver Expiration Report.