samegoal

Field Settings

Some settings can be controlled by administrative users on a per-field basis:

- District Banks
- Copy From Existing Support

Copy from Existing Support

Districts on the PLUS or PRO edition of SameGoal can create new documents by copying from an existing document. This can help save time by automatically copying over most data, excluding dates, signatures, meetings notes, and demographic information.

Administrative users can disable copy from existing support on a per-form basis. Alternatively, if administrative users would like to limit copy from existing support without disabling it at the form level, they can disable it on a per-field basis.

Steps *To disable copy from existing support for a given field:*

1. While logged in as an administrative user, navigate to **Settings** > **District Banks**.
2. Select the form you would like to update settings for. You may need to scroll or go to a different page.
3. Locate the field you would like to update.
4. Click on the gear icon [⚙] next to the field.
5. Select **Disable copy to new document**.
6. Changes will save automatically.

Now, when a user creates a new document by copying from an existing document, information in the given field will not copy over.

Tip If a field never allows copy to new document support or copy to new document support is disabled at the form level, you will not be able to disable copy to new document support at the field level.