

Inventory: Introduction

- [Inventory Module Summary](#)
- [Inventory Database Explanation](#)

Inventory Module Summary

The Inventory Module allows for the creation and management of multiple, separate inventories that can be used to track quantity changes. To do so, the Inventory Module is dependent on customized, underlying databases: a locations database, a stock inventory database, and a (optional) unique items database. The three (or more) underlying databases are created in the Database Module and integrated with the inventory it is associated with in the Inventory Module.

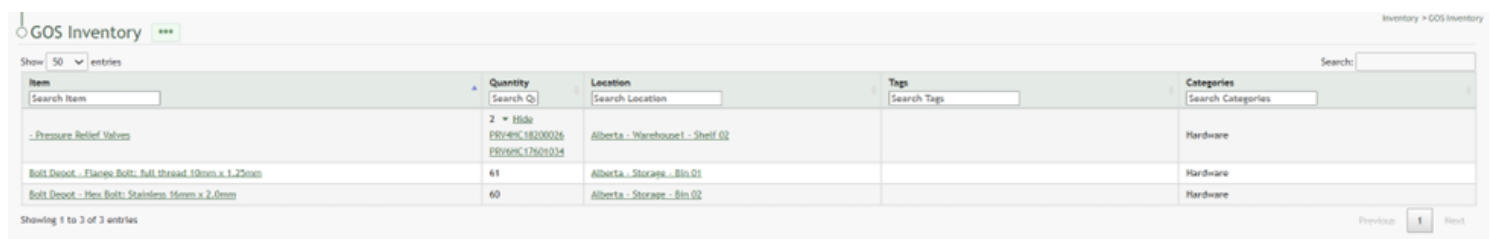
Inventory Database Explanation

The creation of an inventory requires integration with underlying databases that have been created for the purpose of inventory creation. Inventories are functionally dependent on a locations database and a stock database. A unique items database is also an option, but not a requirement for an inventory to function properly.

Databases Integrating with the Inventory Module		
Database	Field Requirements	Notes
Locations Database	None	A database must be selected as a locations inventory. Multiple databases can be utilized if desired. There are no fields that must be specifically included for functionality.
Stock Database	Location	All inventories are required to integrate with a stock database. An explanation of each required field has been provided below.
	Inventory Item (Title)	
	Quantity	
	Part Type**	
Unique Item Database	Inventory Item (Title)	Integrating with a unique item database is optional. An explanation of each required field has been provided below.
	Unique Item Identifier	

**** Part Type is only a required field if you have both a stock and a unique database.**

Inventory items entered into the stock database and the unique items database are combined and visible in the Inventory Item Table within the specific Inventory they have been integrated with.



The screenshot shows the GOS Inventory application interface. At the top, there's a header with the GOS Inventory logo and a search bar. Below the header, there's a table with columns: Item, Quantity, Location, Tags, and Categories. The table contains three rows of data. The first row is for 'Pressure Relief Valves' with a quantity of 2, located at 'Alberta - Warehouse1 - Shelf 02', and categorized as 'Hardware'. The second row is for 'Bolt Depot - Flange Bolt: Full thread 10mm x 1.25mm' with a quantity of 61, located at 'Alberta - Storage - Bin 01', and categorized as 'Hardware'. The third row is for 'Bolt Depot - Hex Bolt: Stainless 16mm x 2.0mm' with a quantity of 60, located at 'Alberta - Storage - Bin 02', and categorized as 'Hardware'. At the bottom of the table, there's a status bar indicating 'Showing 1 to 3 of 3 entries' and navigation buttons for 'Previous' and 'Next'.

Item	Quantity	Location	Tags	Categories
Pressure Relief Valves	2	Alberta - Warehouse1 - Shelf 02		Hardware
Bolt Depot - Flange Bolt: Full thread 10mm x 1.25mm	61	Alberta - Storage - Bin 01		Hardware
Bolt Depot - Hex Bolt: Stainless 16mm x 2.0mm	60	Alberta - Storage - Bin 02		Hardware

Locations Database

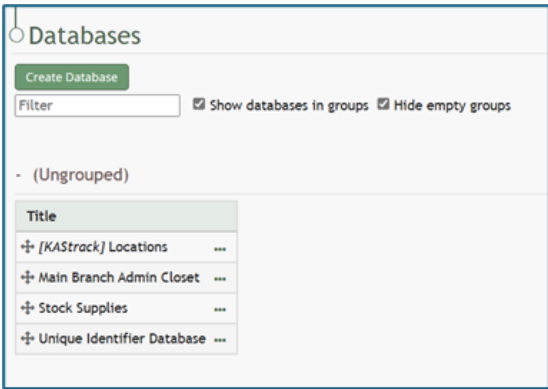
An organization has the freedom to curate how the location database works for best fit by creating one or more databases that define the location of an inventory item. There are no required fields for this database. Possible field names for your locations database include but are not limited to, site, building, position, shelf, bin, etc. Images can be used to visually express inventory items on location.

At least one database must be selected as a location database when creating an inventory.

The Locations Database should be created on the Home Page of the Database Module.

▼ **How To: Create a Database**

To create a new database, go to the Home Page of the Database Module.



Click the “Create Database” button, opening the New Database Modal.

A screenshot of the 'New Database' modal form. It has a green header bar with the title 'New Database' and a close button. The form contains several fields: a 'Title' text box with an asterisk indicating it is required; a 'Group' dropdown menu currently showing '(No Groups Created)'; a 'Description' text area; a 'Tags' section with a 'Select Some Options' button; and an 'Allow Default Access' checkbox which is currently checked.

Input a Title for the new database. Select any groups the database should be associated with. Provide a description of the database and its purpose in the textbox provide. Select any tags desired.

Select the “Allow Default Access” checkbox to indicate that the database should follow the defaults established by module and access levels. If this checkbox is not selected, you will be required to establish user specific access based on individual or certification roles.

Additional Database Specific Permissions

Admins

Select Some Options

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Select Some Options

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save

Cancel

The following database specific permissions are selected via drop down menu lists that include all individuals and certification roles that can be assigned permission.

Admins allows users or role to have admin module level permissions for this particular database. A list of all admin module level permissions is shown in the table below.

Database Admin Module Level Permissions
Manage roles (add/view/edit/delete, assign hidden roles, role permissions)
Database (view/edit/delete/list/add, upload csv)
Database Fields (edit/delete/view/list)
Database Entry (view/edit/delete/list/add)
Can delete entries from other modules
Database draft entries (abandon drafts from guests/users, view drafts from users/guests, list drafts from user/guests, reassign)
Database Group (list/add/edit/delete/view)

Manage Entry Permissions gives the indicated users permission to view, add, edit, and delete database entries.

View Entry Permissions gives the indicated users permission to view database entries.

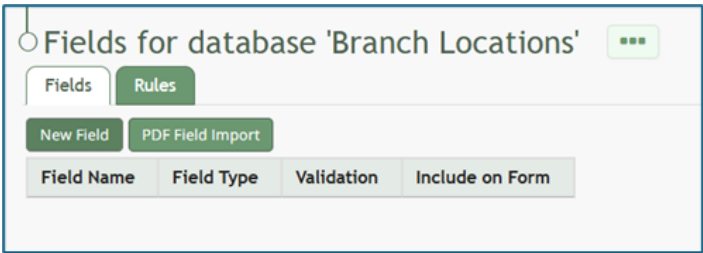
Allow Integration With denotes which other modules can link with and integrate with this database or forms for reference.

The Database Module can be integrated with the following modules:

- Forms
- Database
- Inventory

- Grid

Click “Cancel” and return to the Database Module Home Page without any changes being made. Select “Save” to create the new database and you will be directed to the Fields Table for your newly copied database.



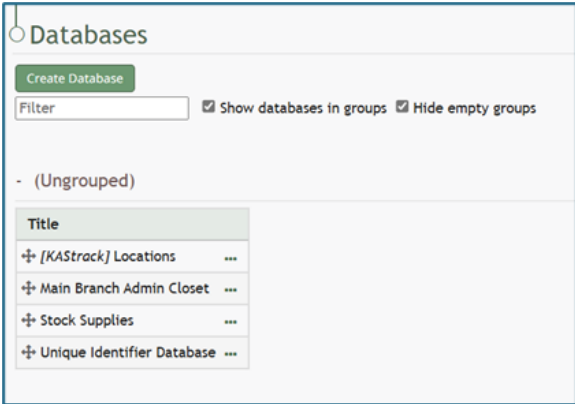
Once a database has been created, you can enter database fields into it.

▼ **How To: Import Fields from a CSV File Into a Database**

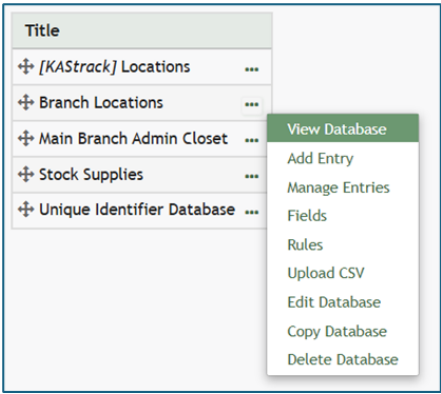
To import database entries from a CSV, database fields must already have been created.

▼ **How To: Add a Database Field**

To create a database field, go to the Home Page of the Database Module.

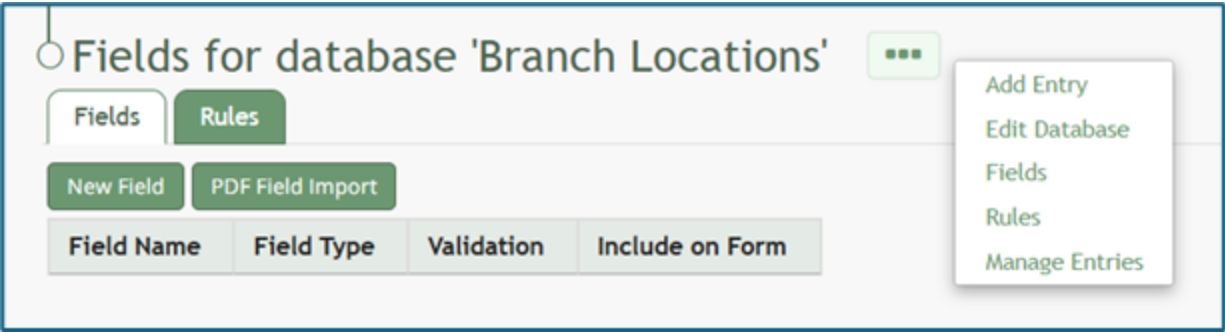


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, and space only) *

Displayed Label

Field Type

Section Start

Form Fields

Text

Text Box

HTML Text Box

Checkbox

Dropdown

Radios

Date

Date/Time

File Upload

Image

Password

Formatting

Section Start

Section End

Tabs Start

Tabs End

Utility

Information

Calculated Field

Sequential Number

section end. All CSS styles must play css style for a section.

px, B: px, L:

px, B: px, L:

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

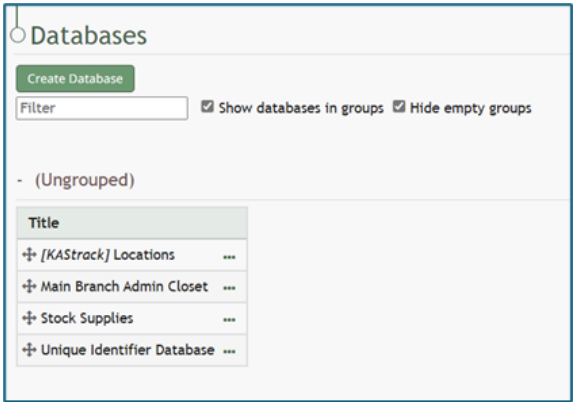
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

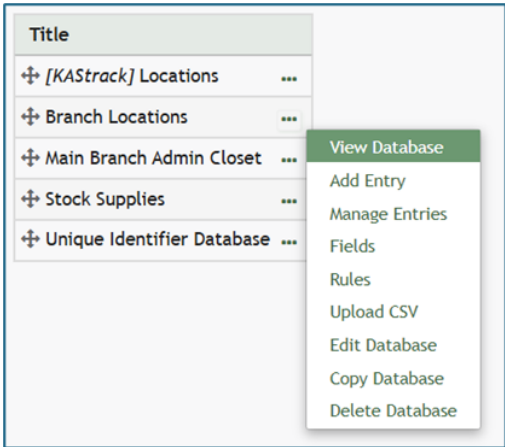
▼ How To: Add a Database Field

 $\{\{ @321 \}\}$

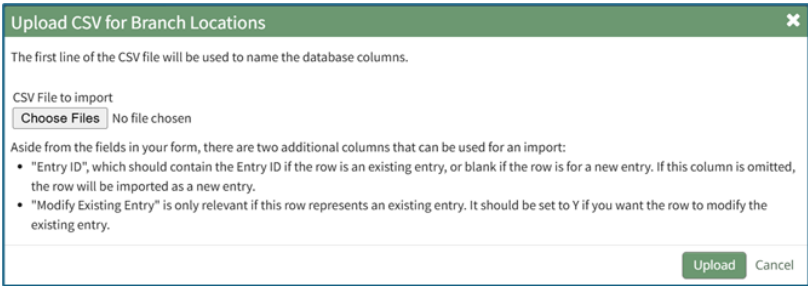
To import database field names from a CSV file, go to the Home Page of the Database Module.



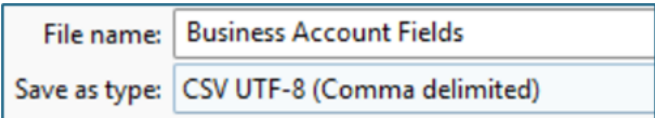
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.



After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name: Business Account Fields

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

"Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.

"Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Database > Import CSV To Business C

Upload CSV for Business Client Accounts

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name Type: Text Validation:	Name: City Type: Text Validation:	Name: State Type: Text Validation:	Name: Employee Count Type: Text Validation:	Name: Annual Revnue Type: Text Validation:
--	---	--	---	--

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

0 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

Fields for database 'Business Client Accounts' ⋮

Fields Rules

New Field Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name ⋮	Text		Yes
+ City ⋮	Text		Yes
+ State ⋮	Text		Yes
+ Employee Count ⋮	Text		Yes
+ Annual Revnue ⋮	Text		Yes
+ Account Manager ⋮	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

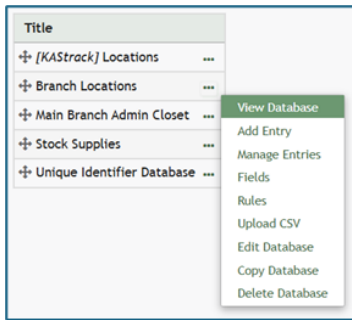
Filter

☒ Show databases in groups ☒ Hide empty groups

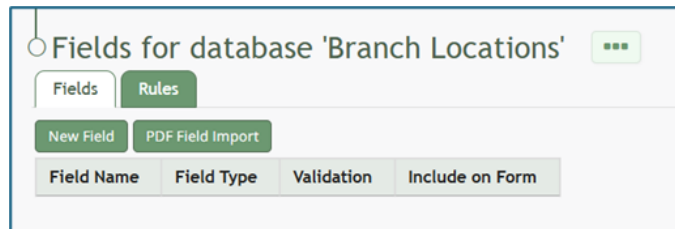
- (Ungrouped)

Title
+ [KAStrack] Locations ⋮
+ Main Branch Admin Closet ⋮
+ Stock Supplies ⋮
+ Unique Identifier Database ⋮

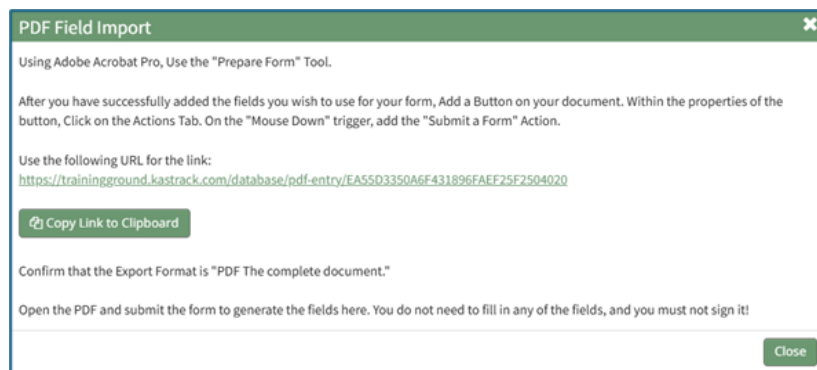
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



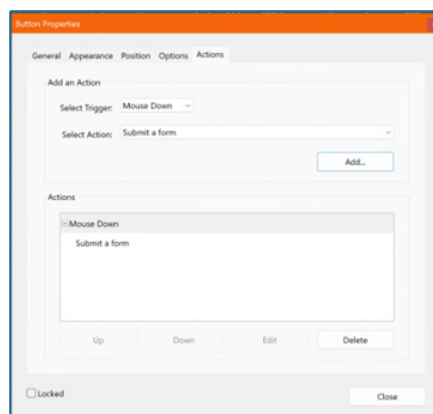
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

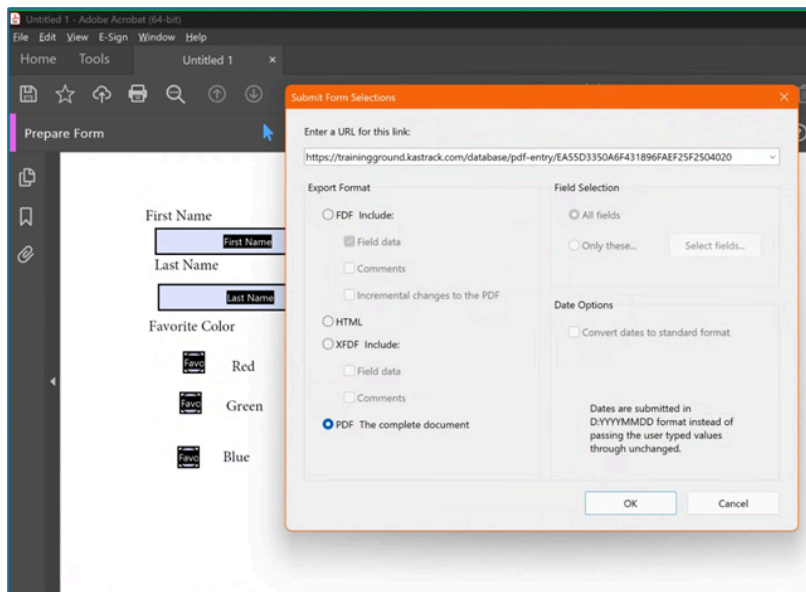


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

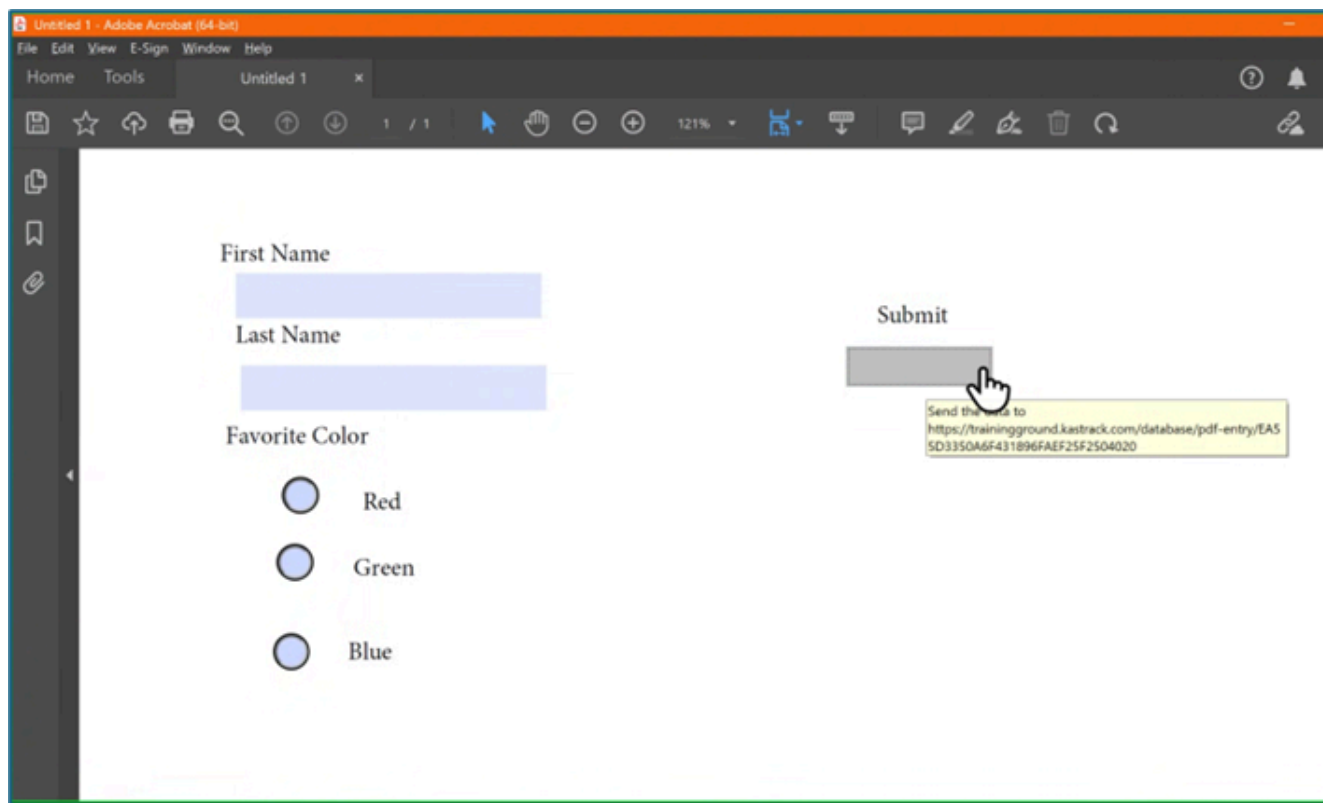


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KASTrack.

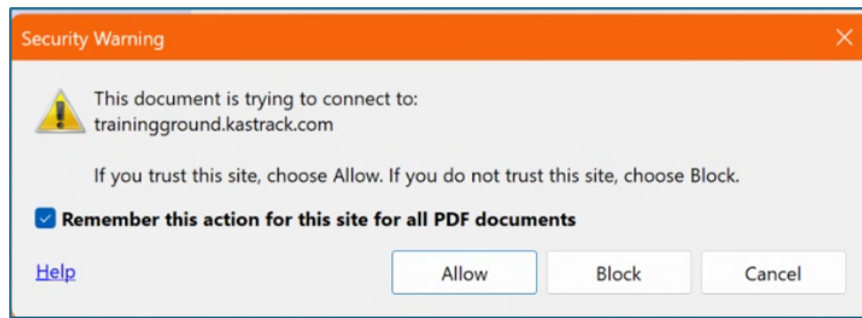


Confirm that the Export Format is “PDF The complete document”.

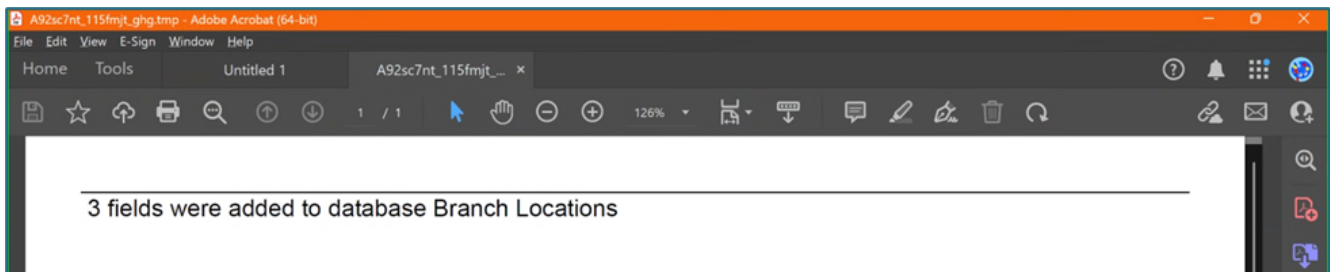


Open the PDF and submit the form to generate the fields here.

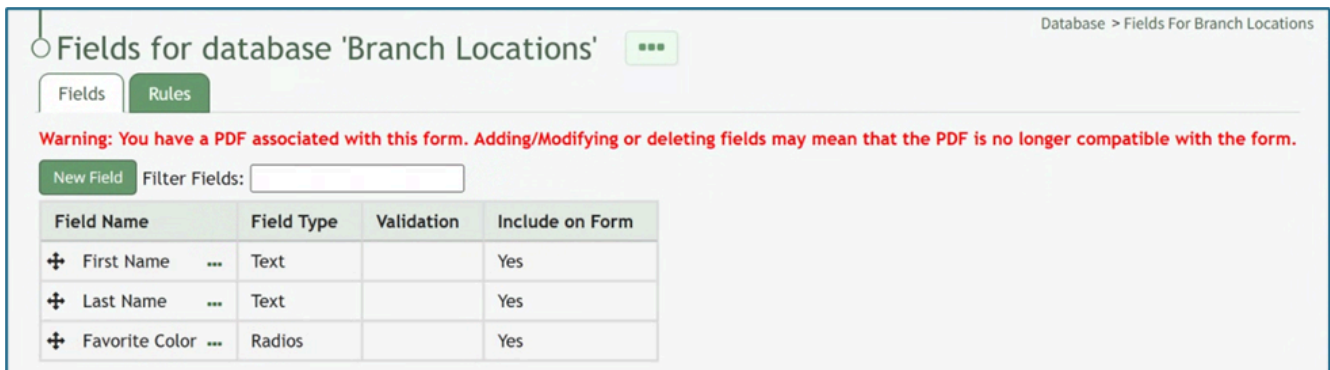
You do not need to fill in any of the fields, and you must not sign it.



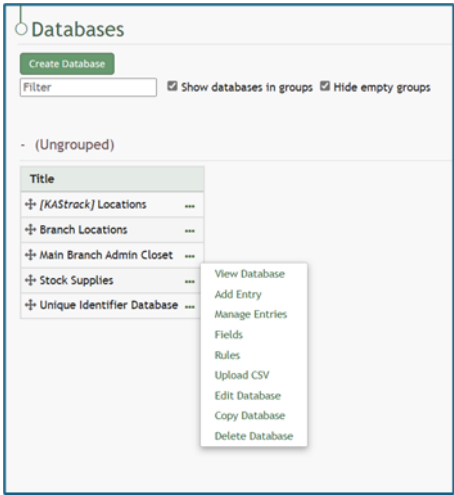
Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

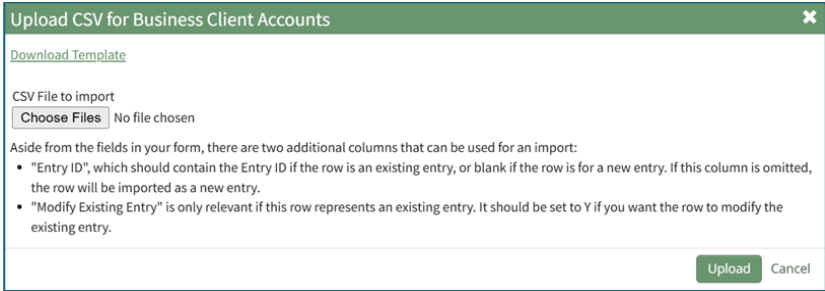


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

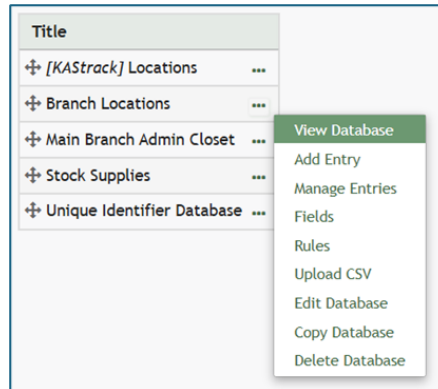
Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

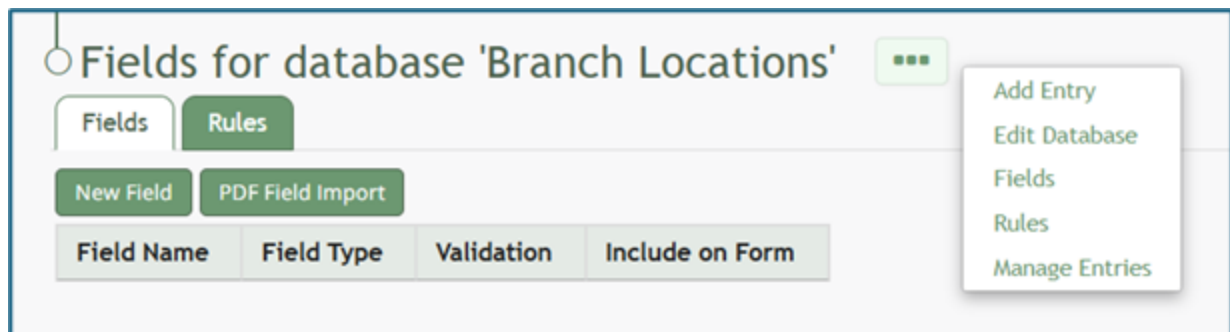
Title
✚ [KAStrack] Locations ...
✚ Main Branch Admin Closet ...
✚ Stock Supplies ...
✚ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Fields" opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the "New Field" button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select "Add Entry".



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, _, - and space only) *

Displayed Label

Field Type
Section Start

Form Fields

- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password

Formatting

- Section Start
- Section End
- Tabs Start
- Tabs End

Utility

- Information
- Calculated Field
- Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \} \}$

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

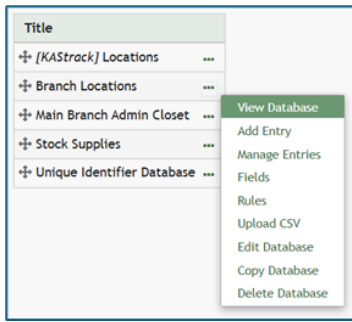
Filter

☒ Show databases in groups
 ☒ Hide empty groups

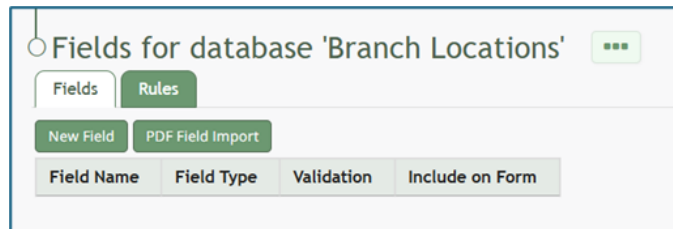
(Ungrouped)

Title	
+ [KAStrack] Locations	...
+ Main Branch Admin Closet	...
+ Stock Supplies	...
+ Unique Identifier Database	...

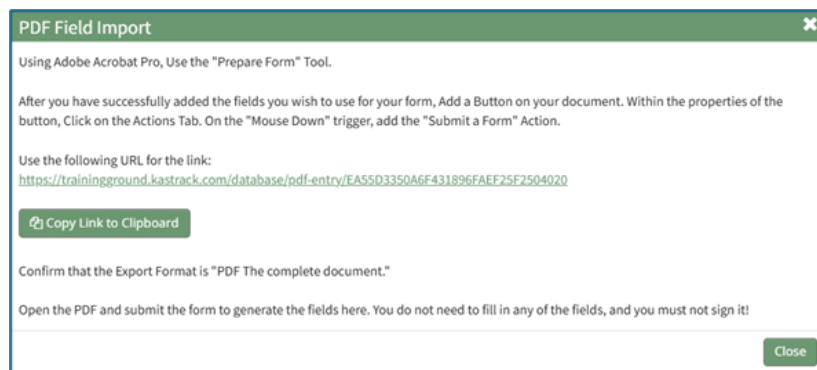
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



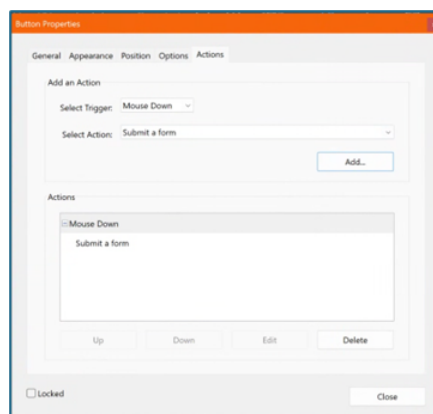
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

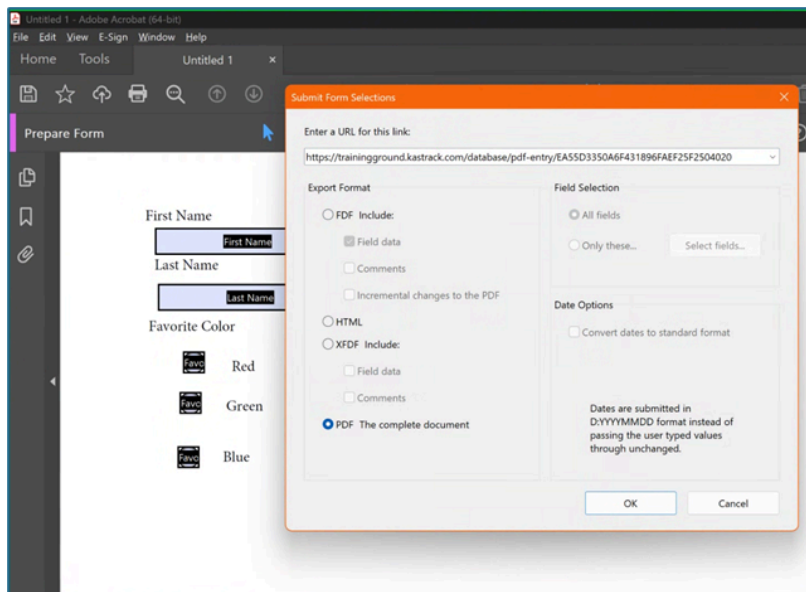


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

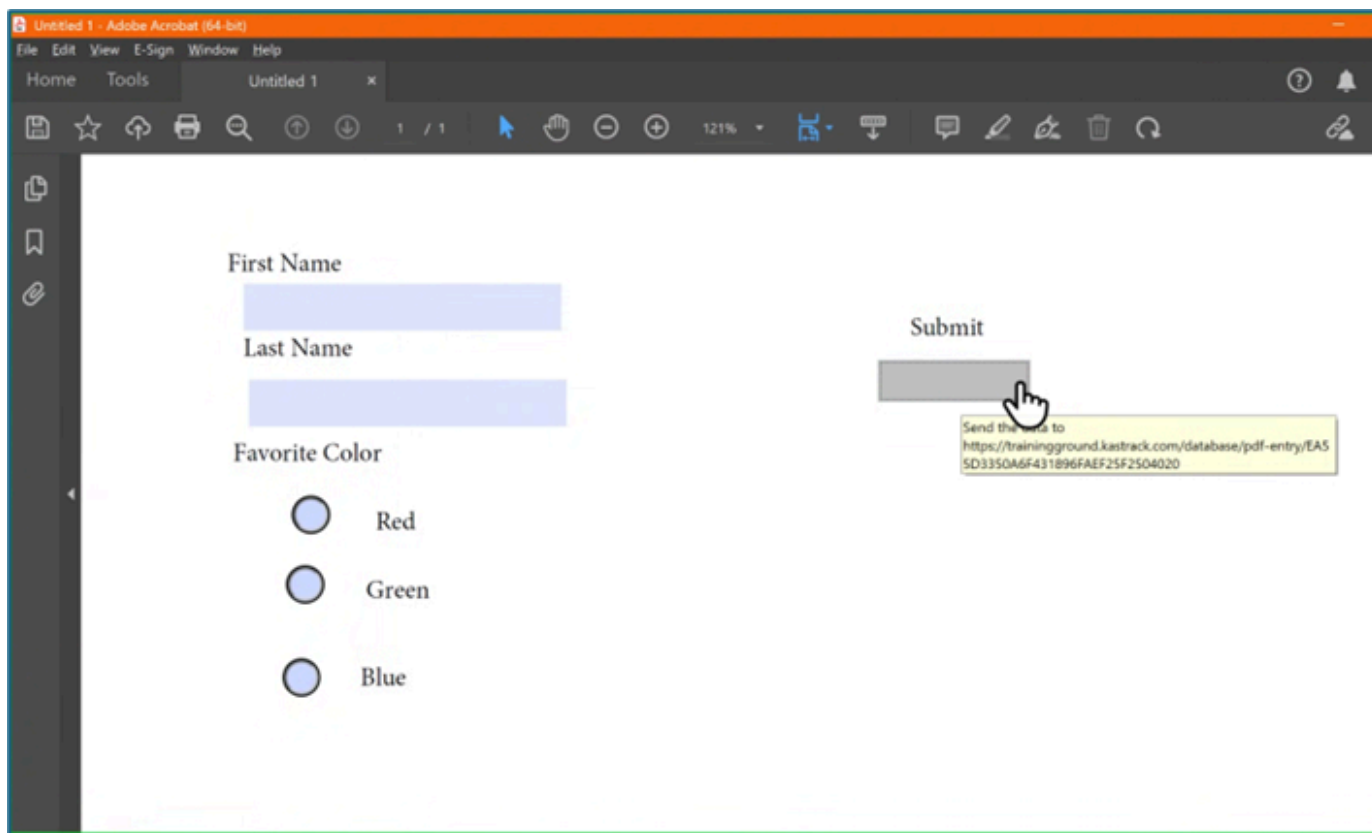


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KASTrack.

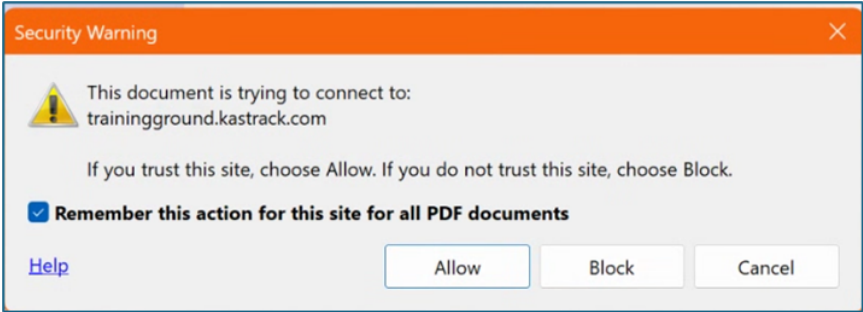


Confirm that the Export Format is “PDF The complete document”.

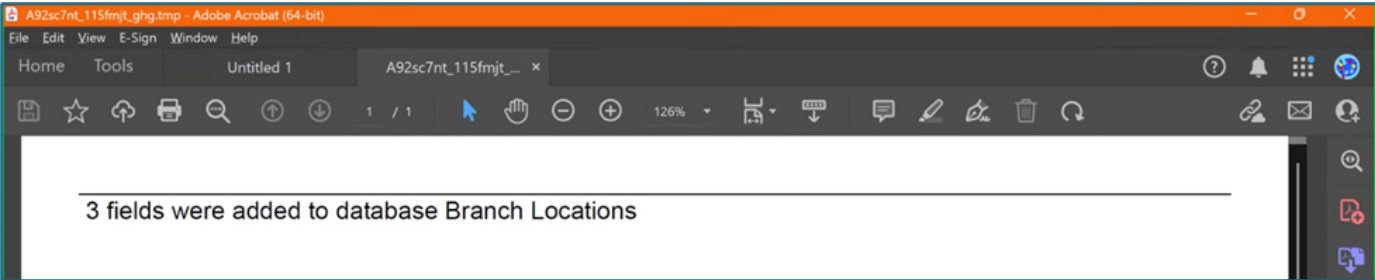


Open the PDF and submit the form to generate the fields here.

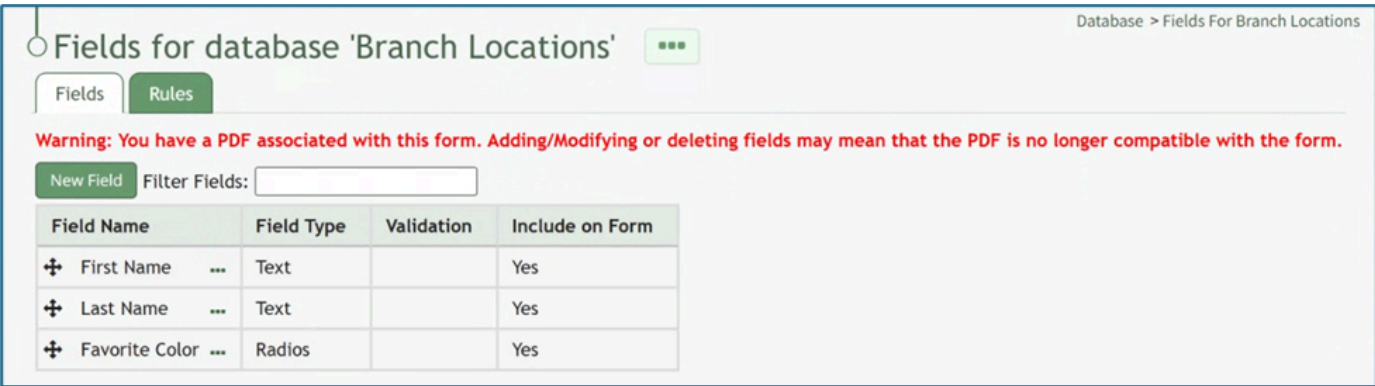
You do not need to fill in any of the fields, and you must not sign it.



Select “Allow” and the PDF will confirm that the fields were added to the database.

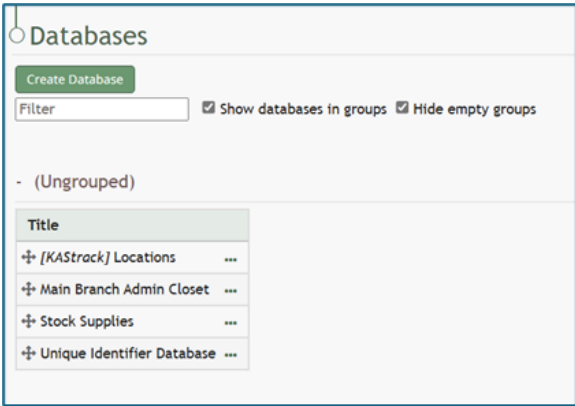


Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

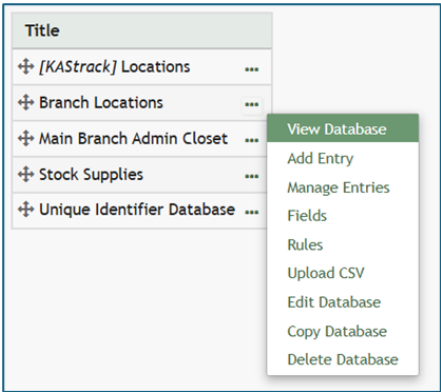


▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

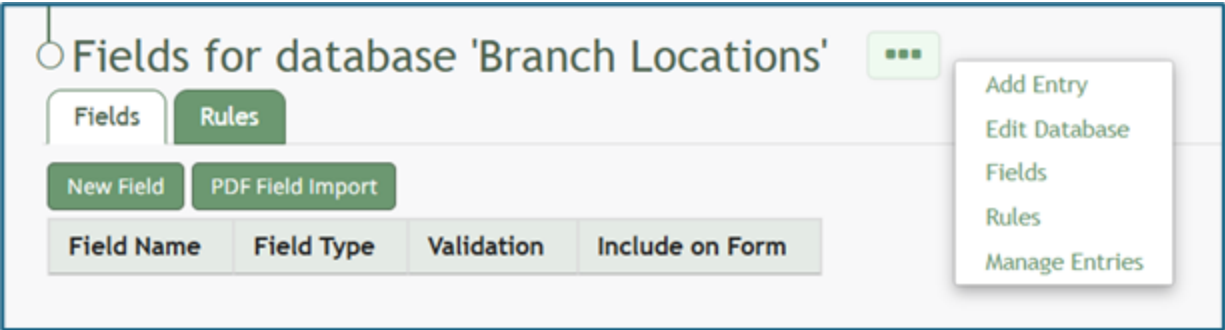


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

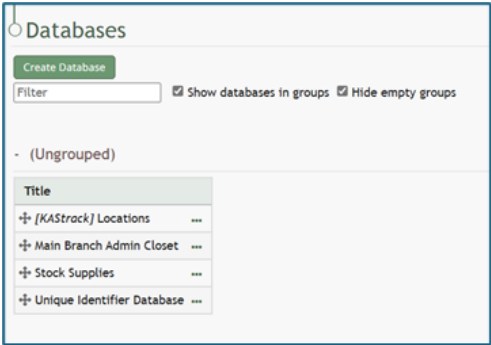
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

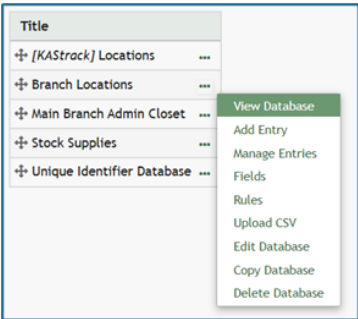
▼ How To: Add a Database Field

{{@321}}

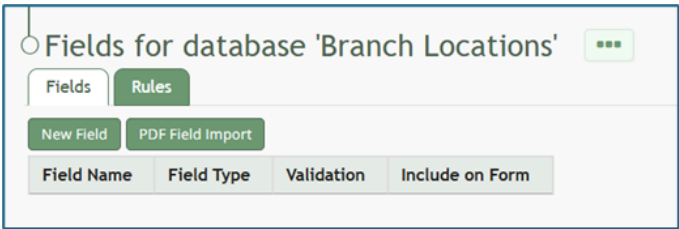
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

PDF Field Import

Using Adobe Acrobat Pro, Use the "Prepare Form" Tool.

After you have successfully added the fields you wish to use for your form, Add a Button on your document. Within the properties of the button, Click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the following URL for the link:
<https://trainingground.kastrack.com/database/pdf-entry/EAS5D3350A6F431896FAEF25F2504020>

Copy Link to Clipboard

Confirm that the Export Format is "PDF The complete document."

Open the PDF and submit the form to generate the fields here. You do not need to fill in any of the fields, and you must not sign it!

Close

To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

Button Properties

General Appearance Position Options Actions

Add an Action

Select Trigger: Mouse Down

Select Action: Submit a form

Add...

Actions

Mouse Down

Submit a form

Up Down Edit Delete

Locked

Close

Within the button properties, click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the URL link provided on the PDF Field Import Modal in KAStrack.

Untitled 1 - Adobe Acrobat (64-bit)

File Edit View E-Sign Window Help

Home Tools

Untitled 1 x

Prepare Form

First Name

Last Name

Favorite Color

Red

Green

Blue

Submit Form Selections

Enter a URL for this link:
<https://trainingground.kastrack.com/database/pdf-entry/EAS5D3350A6F431896FAEF25F2504020>

Export Format

☐ PDF Include:
☐ Field data
☐ Comments
☐ Incremental changes to the PDF

☐ HTML

☐ XFDF Include:
☐ Field data
☐ Comments

☒ PDF The complete document

Field Selection

☐ All fields

☐ Only these...
Select fields...

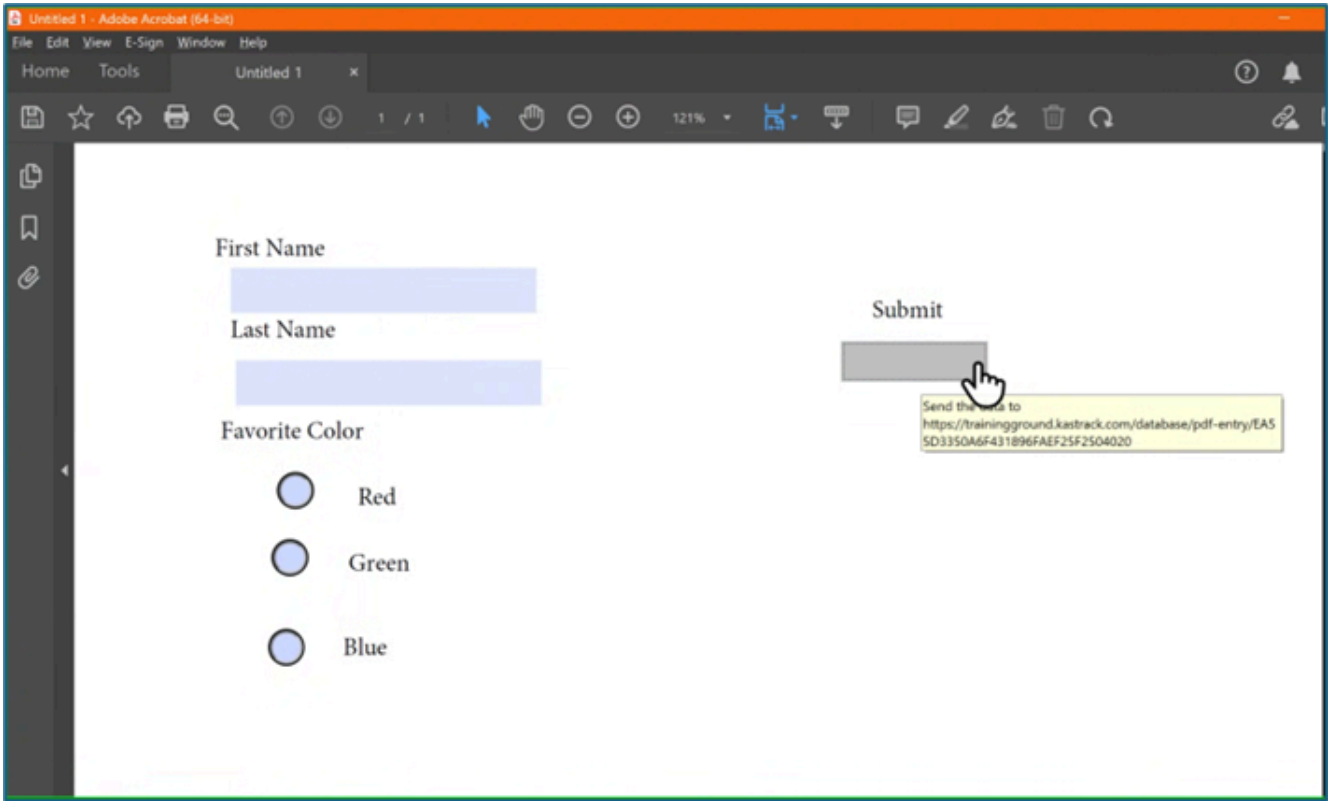
Date Options

☐ Convert dates to standard format

Dates are submitted in D:YYYYMMDD format instead of passing the user typed values through unchanged.

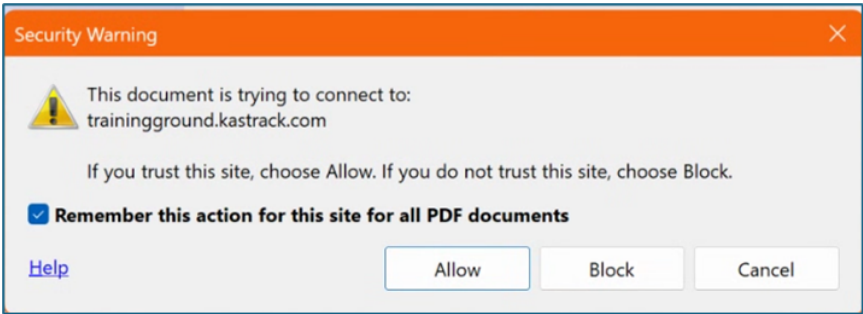
OK Cancel

Confirm that the Export Format is "PDF The complete document".

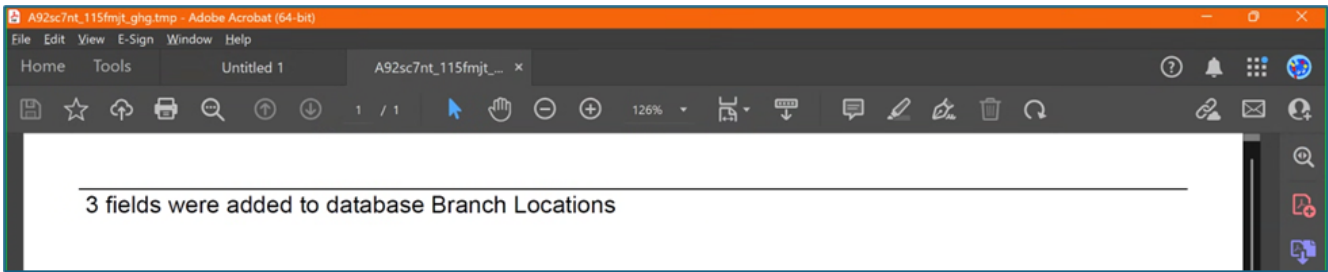


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

...

Database > Fields For Branch Locations

Fields

Rules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

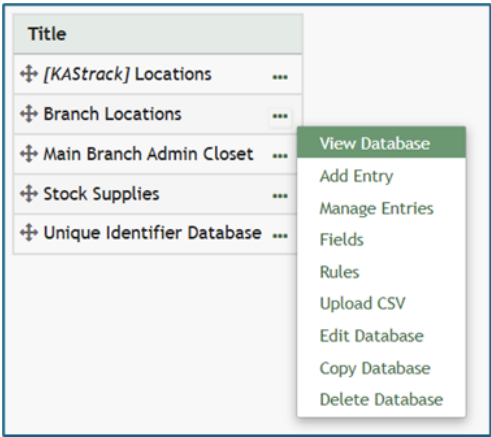
Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

Once you have entered database fields, you can add database entries into it.

▼ How To: Add an Individual Database Entry

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.



Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations

Shelf1 - Bin1

Items

Quantity

Part Type

Please Choose...

Category

Client

Save

Cancel

New Database Entry

Shelf

Please Choose

Bin

Please Choose

Save

Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save

Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

Enable Bulk Edit Mode

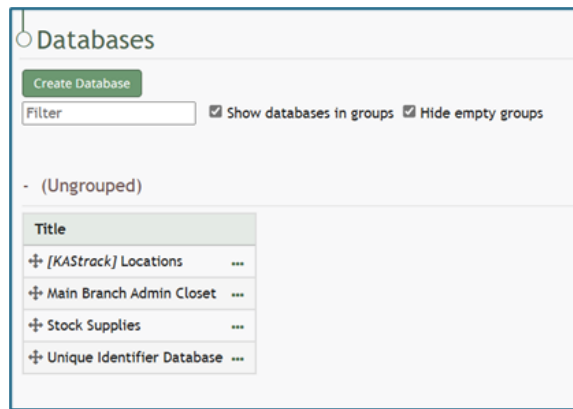
Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

▼ How To: Import Database Entries from a CSV

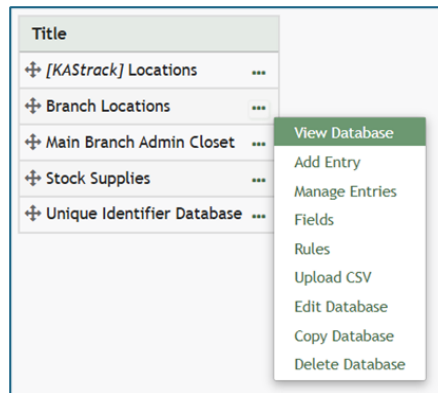
To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

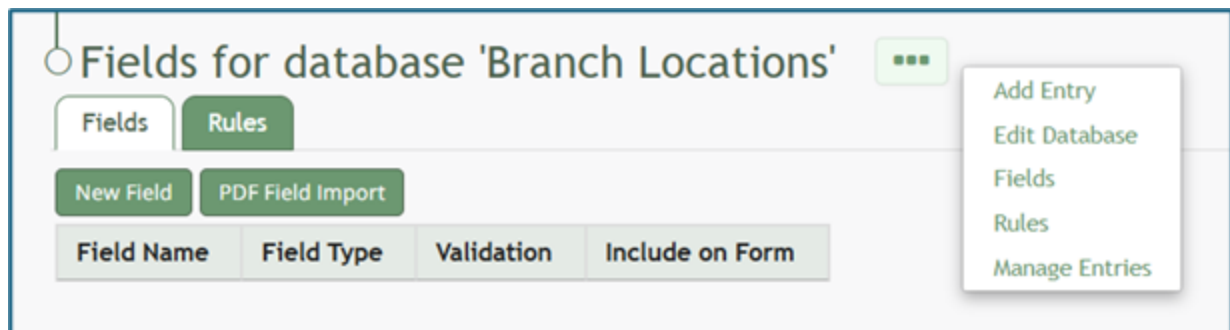


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Fields" opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the "New Field" button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select "Add Entry".



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

{{@340}}

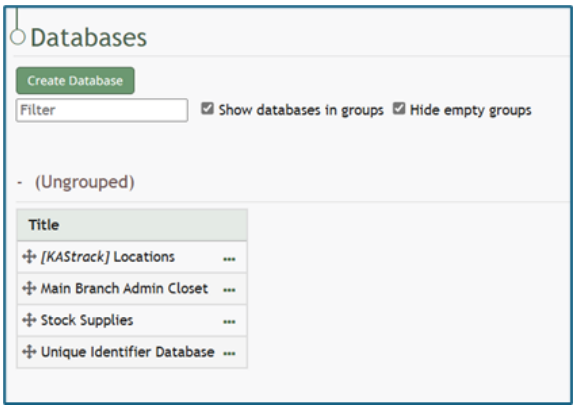
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

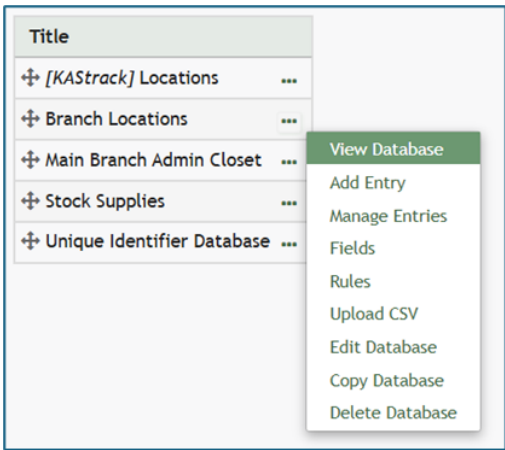
▼ How To: Add a Database Field

{{@321}}

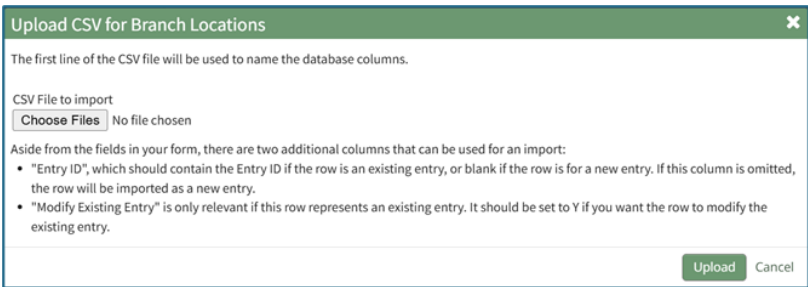
To import database field names from a CSV file, go to the Home Page of the Database Module.



Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Upload CSV" opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.

File name:

Business Account Fields

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Account Fields

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business C

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name Type: Text Validation:	Name: City Type: Text Validation:	Name: State Type: Text Validation:	Name: Employee Count Type: Text Validation:	Name: Annual Revnue Type: Text Validation:
--	---	--	---	--

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

○ CSV uploaded for Business Client Accounts

0 records imported
0 records updated
0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

○ Fields for database 'Business Client Accounts'

Fields

Rules

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name	Text		Yes
+ City	Text		Yes
+ State	Text		Yes
+ Employee Count	Text		Yes
+ Annual Revnue	Text		Yes
+ Account Manager	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

○ Databases

Create Database

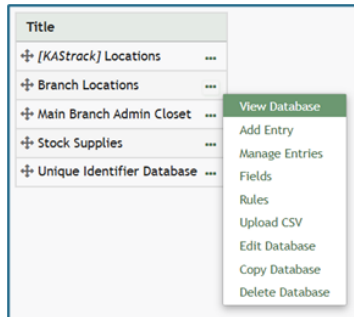
Filter

☒ Show databases in groups ☒ Hide empty groups

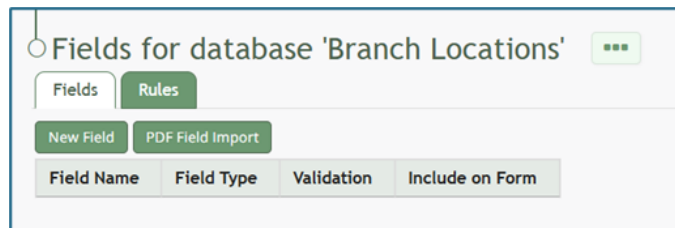
- (Ungrouped)

Title
+ [KASrock] Locations
+ Main Branch Admin Closet
+ Stock Supplies
+ Unique Identifier Database

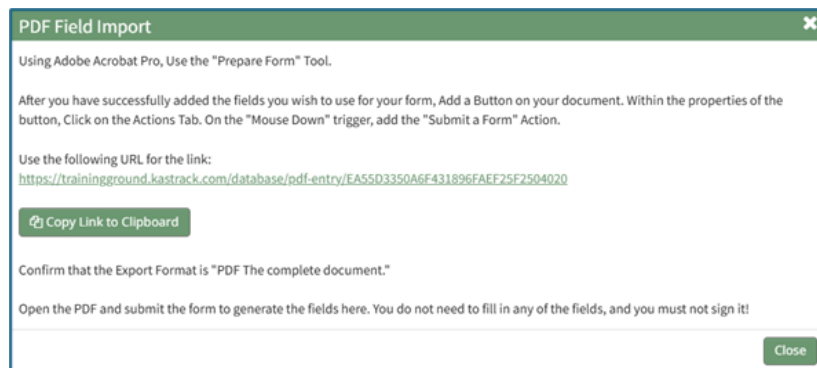
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



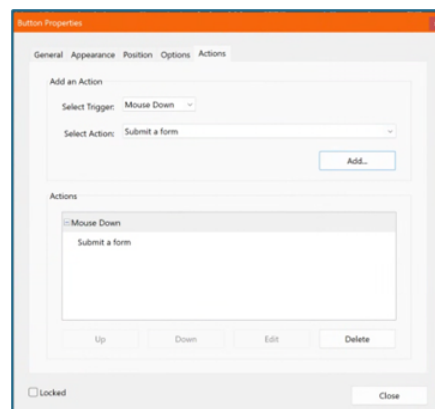
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

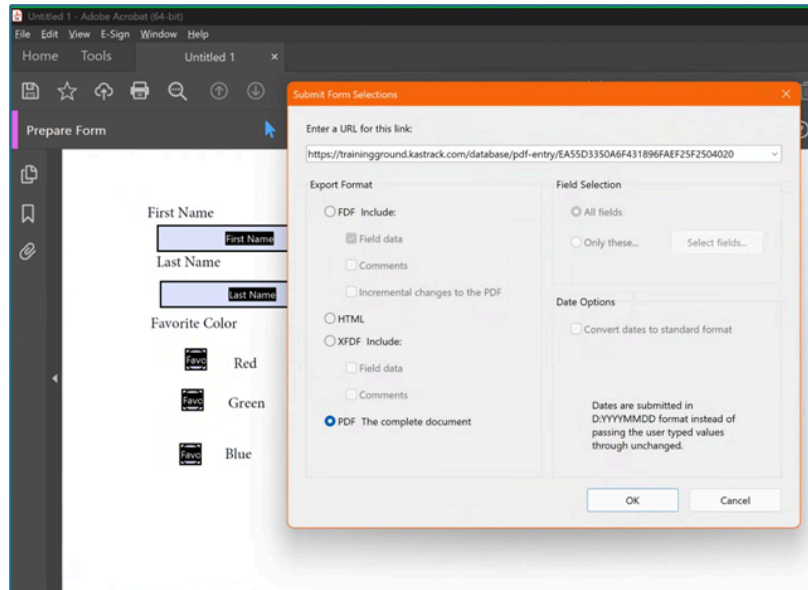


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

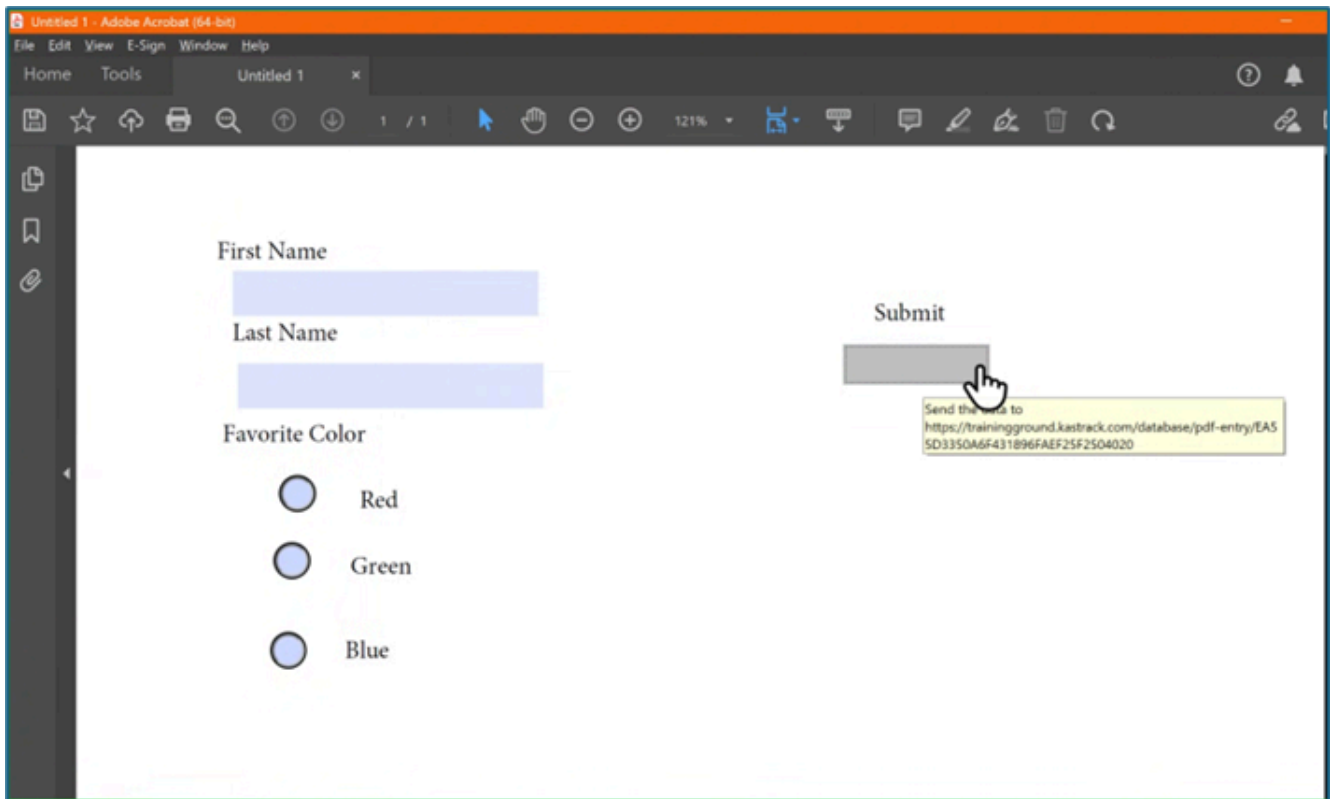


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

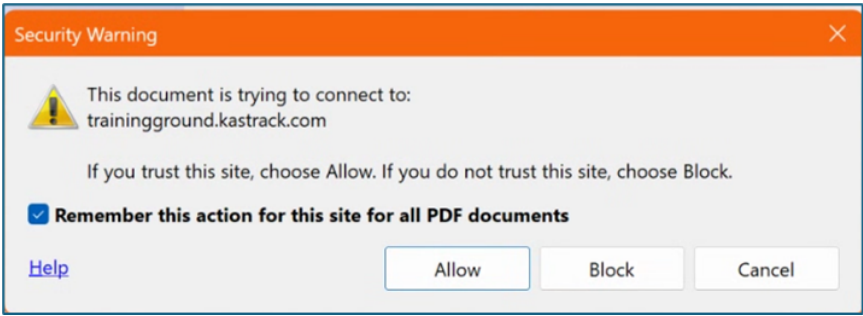


Confirm that the Export Format is “PDF The complete document”.

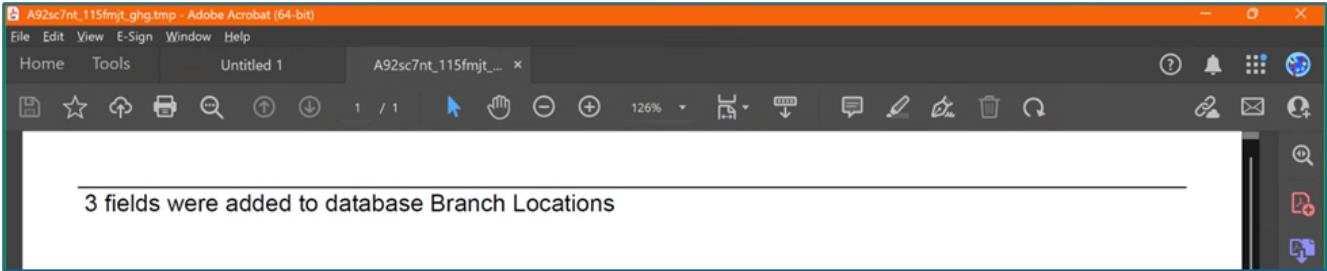


Open the PDF and submit the form to generate the fields here.

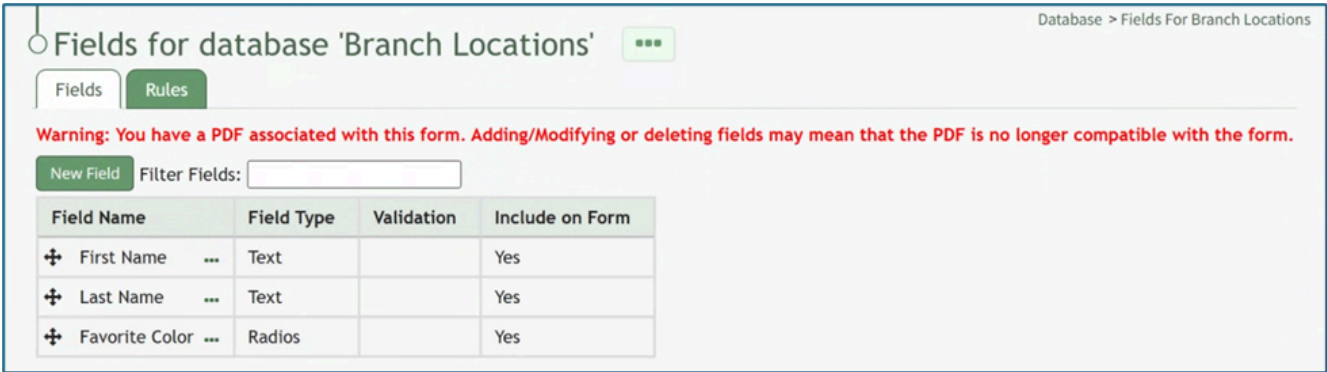
You do not need to fill in any of the fields, and you must not sign it.



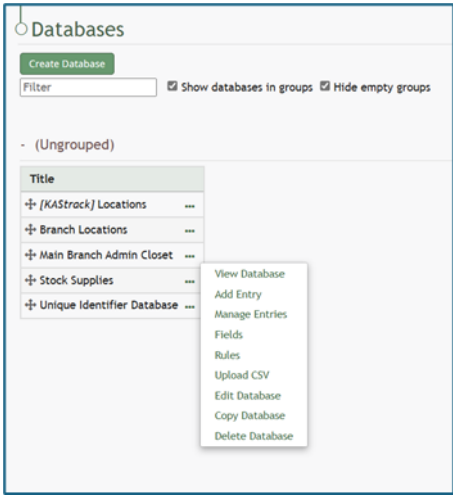
Select “Allow” and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

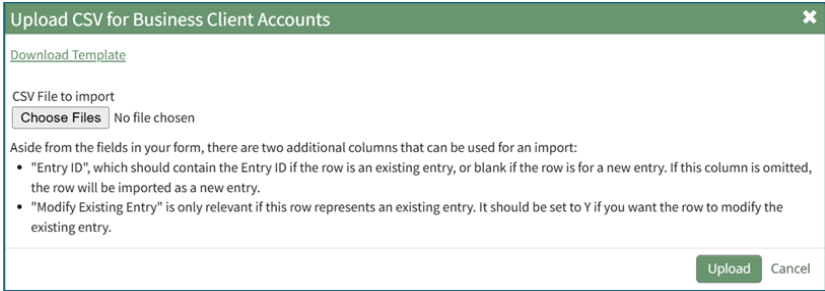


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ **Notes Regarding the Downloadable Template for Uploading CSV Files**

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified.

Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Add a Database Field

To create a new database, go to the Home Page of the Database Module.

Databases

Create Database

Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

Title

+ [KAStrack] Locations

+ Main Branch Admin Closet

+ Stock Supplies

+ Unique Identifier Database

Click the “Create Database” button, opening the New Database Modal.

New Database

Title *

Group

(No Groups Created)

Description

Tags

Select Some Options

☒ Allow Default Access

Input a Title for the new database. Select any groups the database should be associated with. Provide a description of the database and its purpose in the textbox provide. Select any tags desired.

Select the “Allow Default Access” checkbox to indicate that the database should follow the defaults established by module and access levels. If this checkbox is not selected, you will be required to establish user specific access based on individual or certification roles.

Additional Database Specific Permissions

Admins

Select Some Options

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Select Some Options

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save

Cancel

The following database specific permissions are selected via drop down menu lists that include all individuals and certification roles that can be assigned permission.

Admins allows users or role to have admin module level permissions for this particular database. A list of all admin module level permissions is shown in the table below.

Database Admin Module Level Permissions
Manage roles (add/view/edit/delete, assign hidden roles, role permissions)
Database (view/edit/delete/list/add, upload csv)
Database Fields (edit/delete/view/list)
Database Entry (view/edit/delete/list/add)
Can delete entries from other modules
Database draft entries (abandon drafts from guests/users, view drafts from users/guests, list drafts from user/guests, reassign)
Database Group (list/add/edit/delete/view)

Manage Entry Permissions gives the indicated users permission to view, add, edit, and delete database entries.

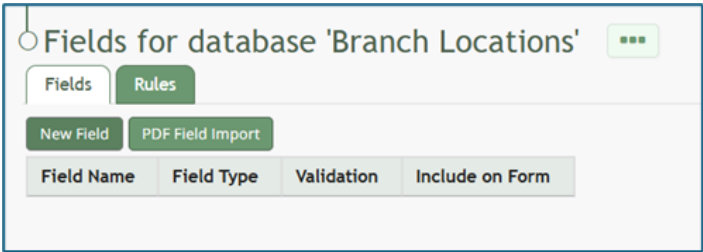
View Entry Permissions gives the indicated users permission to view database entries.

Allow Integration With denotes which other modules can link with and integrate with this database or forms for reference.

The Database Module can be integrated with the following modules:

- Forms
- Database
- Inventory
- Grid

Click “Cancel” and return to the Database Module Home Page without any changes being made. Select “Save” to create the new database and you will be directed to the Fields Table for your newly copied database.



Once a database has been created, you can enter database fields into it.

▼ How To: Import Fields from a CSV File Into a Database

To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

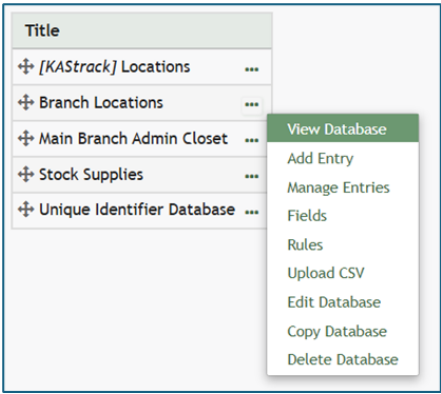
Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

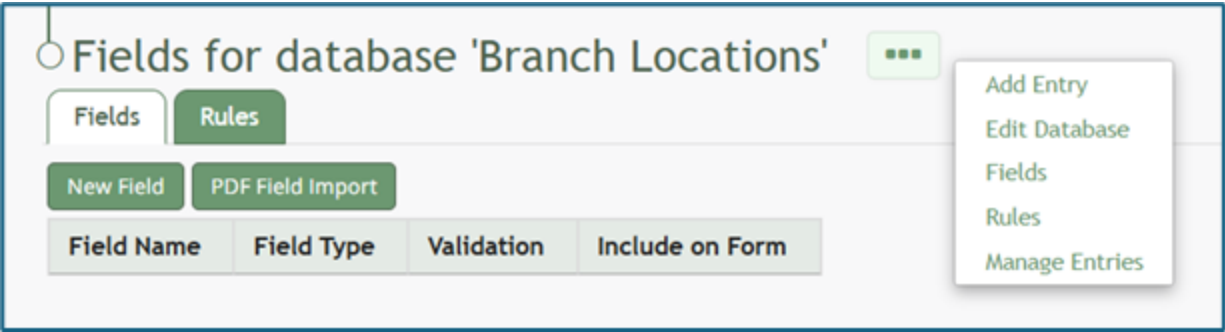
Title	
✚ [KAStrack] Locations	...
✚ Main Branch Admin Closet	...
✚ Stock Supplies	...
✚ Unique Identifier Database	...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, _, - and space only) *

Displayed Label

Field Type
Section Start

Form Fields

- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password

Formatting

- Section Start
- Section End
- Tabs Start
- Tabs End

Utility

- Information
- Calculated Field
- Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

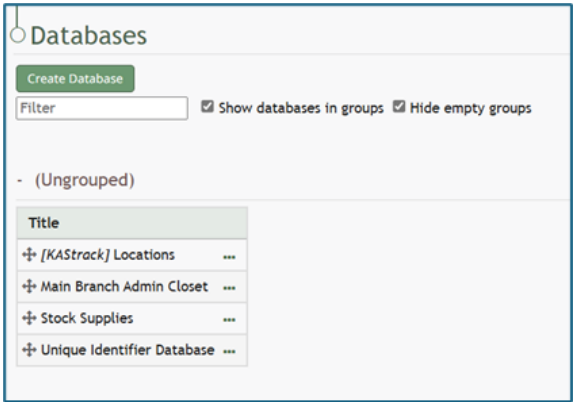
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

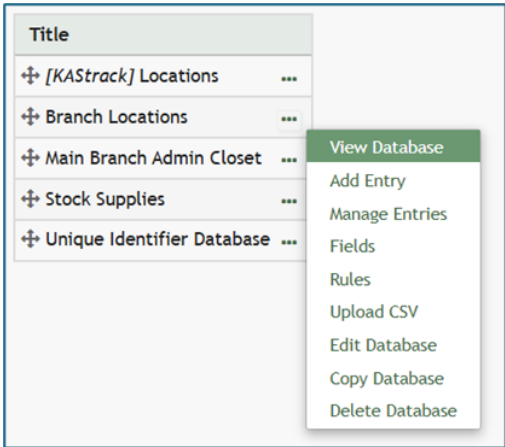
▼ How To: Add a Database Field

 $\{\{ @321 \}\}$

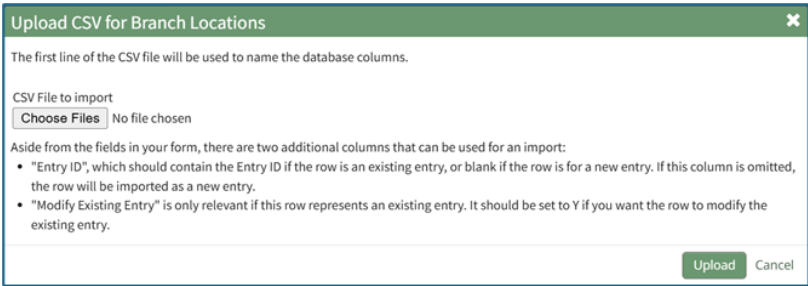
To import database field names from a CSV file, go to the Home Page of the Database Module.



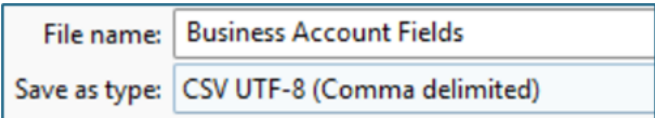
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.



After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name: Business Account Fields

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Database > Import CSV To Business C

Upload CSV for Business Client Accounts

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name	Name: City	Name: State	Name: Employee Count	Name: Annual Revnue
Type: Text	Type: Text	Type: Text	Type: Text	Type: Text
Validation:	Validation:	Validation:	Validation:	Validation:

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

0 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

Fields for database 'Business Client Accounts' ⋮

Fields Rules

New Field Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name ...	Text		Yes
+ City ...	Text		Yes
+ State ...	Text		Yes
+ Employee Count ...	Text		Yes
+ Annual Revnue ...	Text		Yes
+ Account Manager ...	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

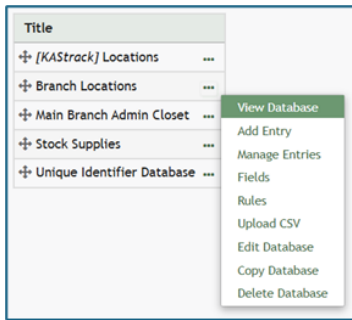
Filter

☒ Show databases in groups ☒ Hide empty groups

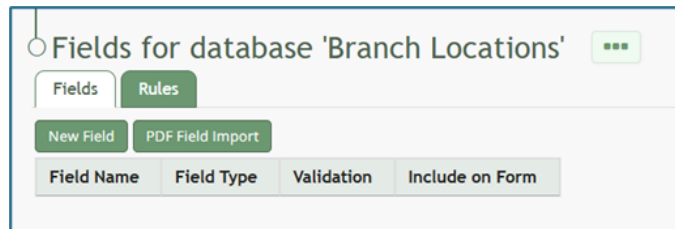
- (Ungrouped)

Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

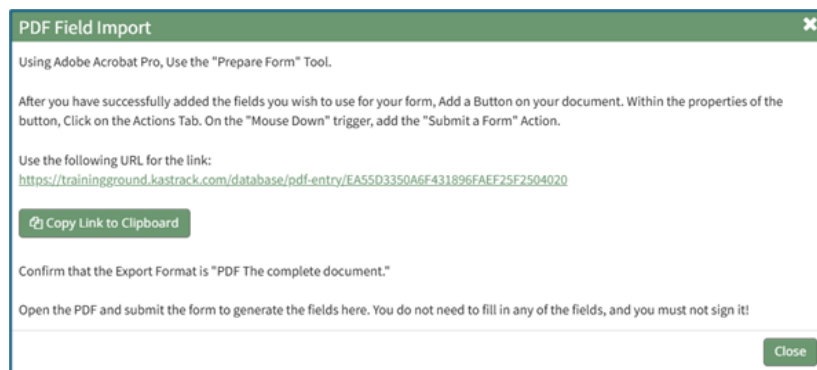
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



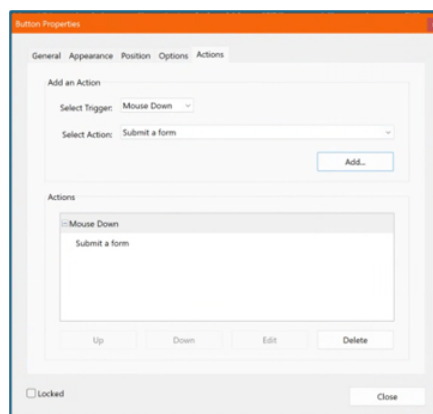
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

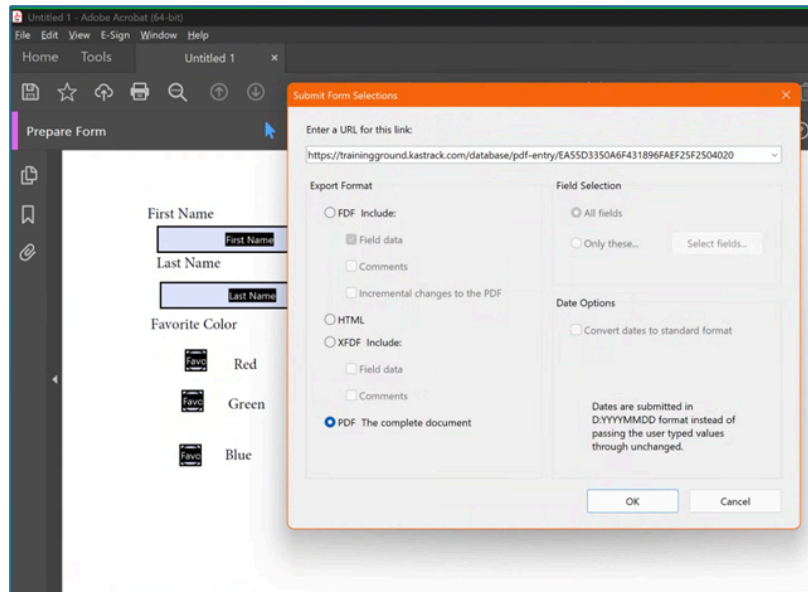


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

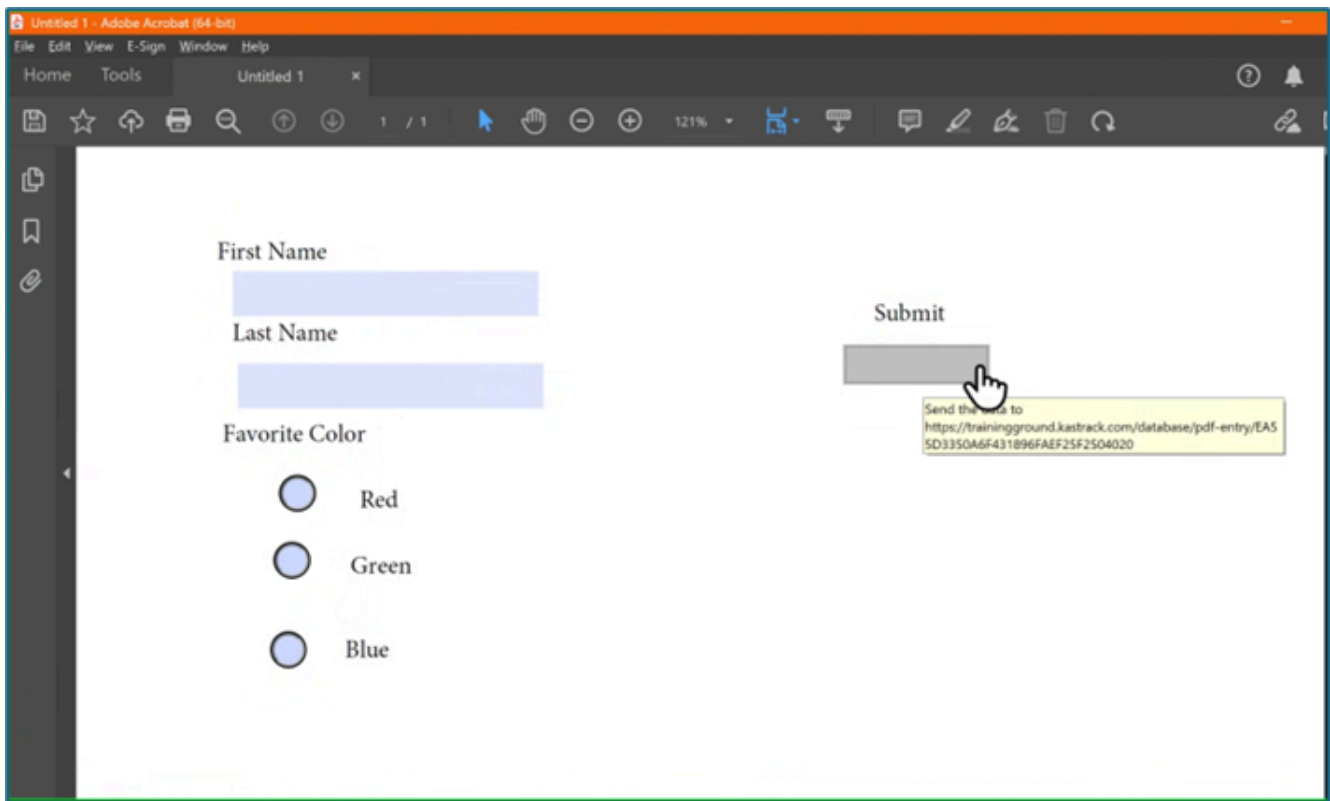


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KASTrack.

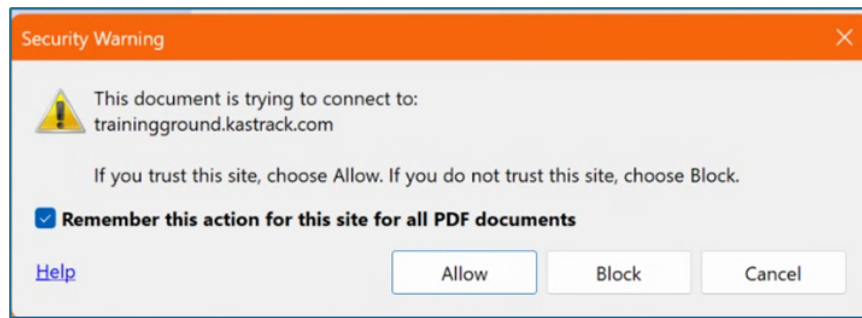


Confirm that the Export Format is “PDF The complete document”.

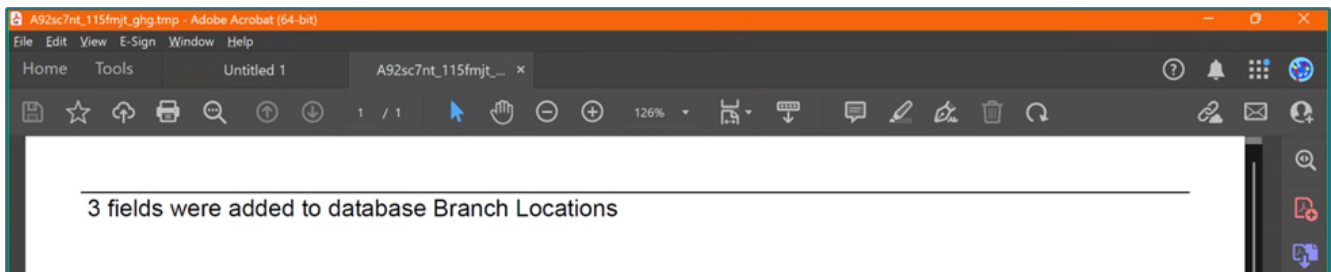


Open the PDF and submit the form to generate the fields here.

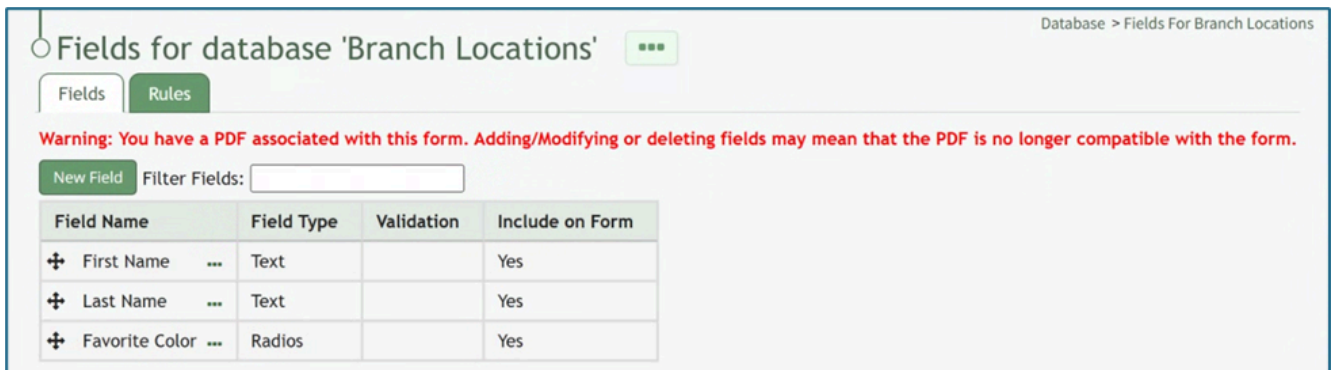
You do not need to fill in any of the fields, and you must not sign it.



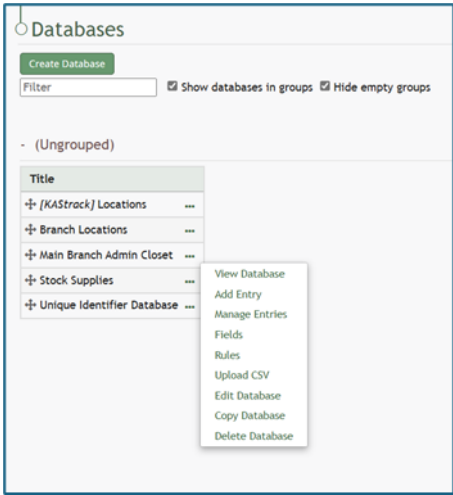
Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

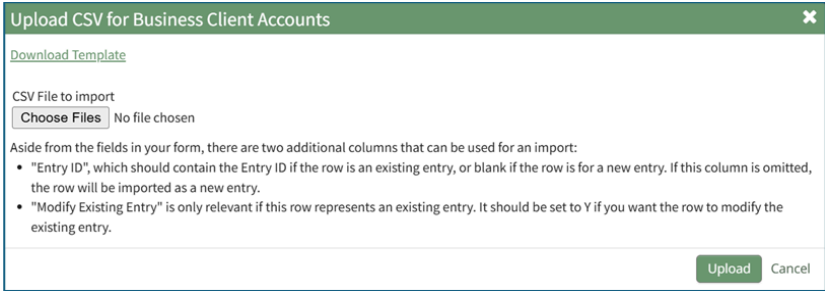


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified.

Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

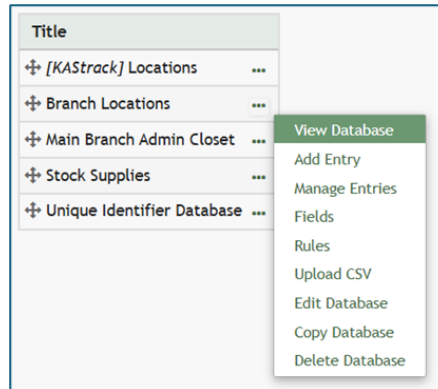
Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

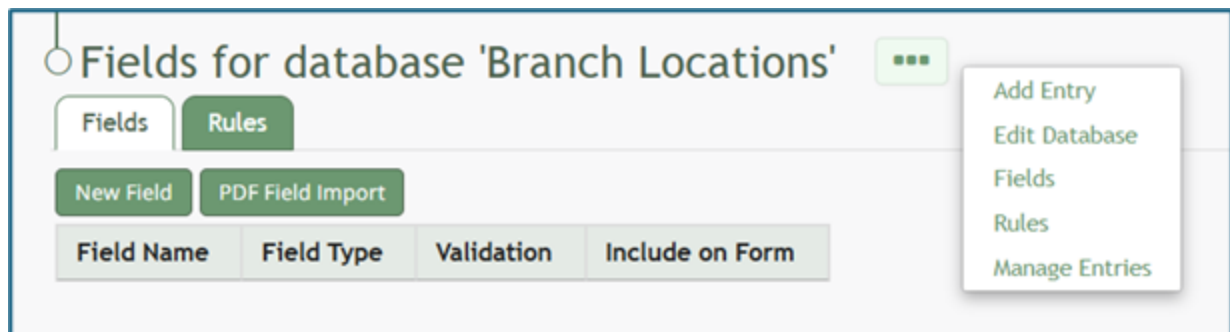
Title
✚ [KAStrack] Locations ...
✚ Main Branch Admin Closet ...
✚ Stock Supplies ...
✚ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, _{und} - and space only) *

Displayed Label

Field Type
 Section Start

Form Fields

- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password

Formatting

- Section Start
- Section End
- Tab Start
- Tab End

Utility

- Information
- Calculated Field
- Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

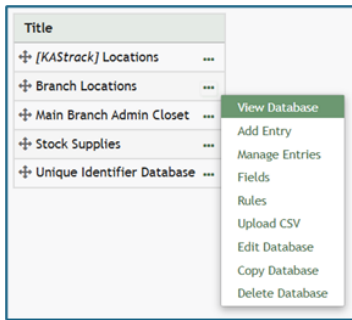
Filter

☒ Show databases in groups
 ☒ Hide empty groups

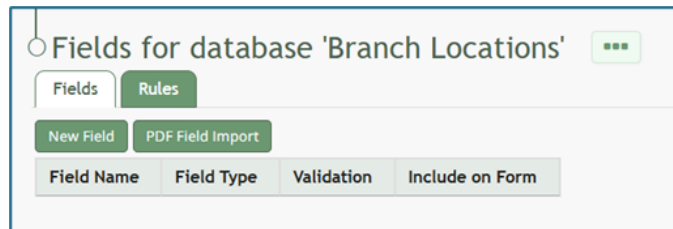
- (Ungrouped)

Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

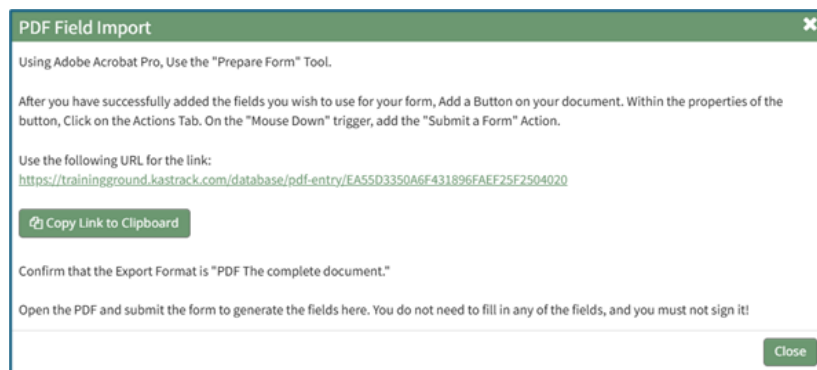
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



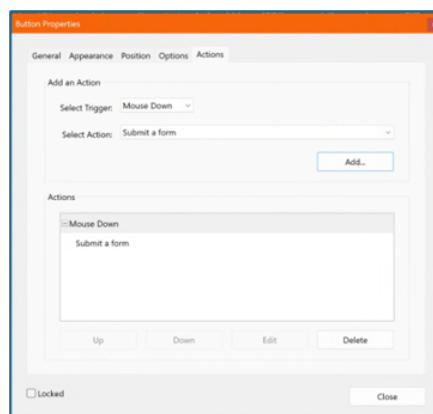
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

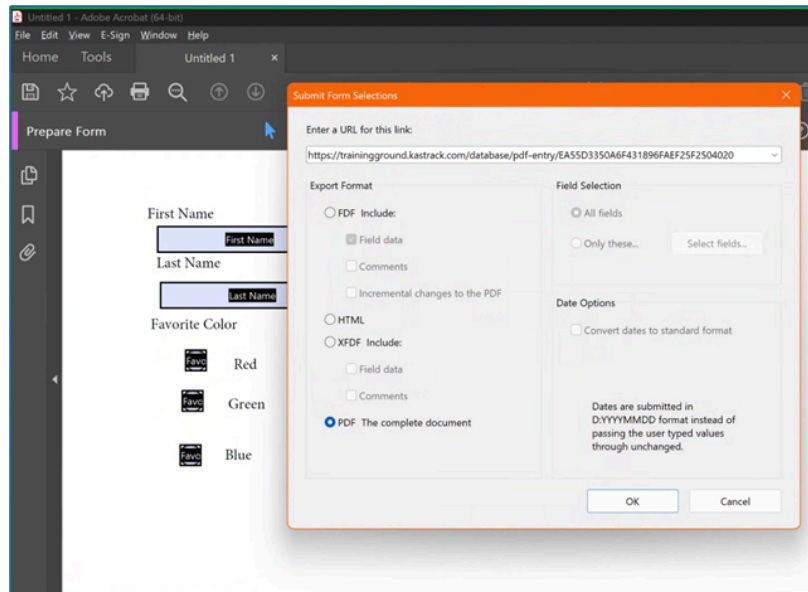


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

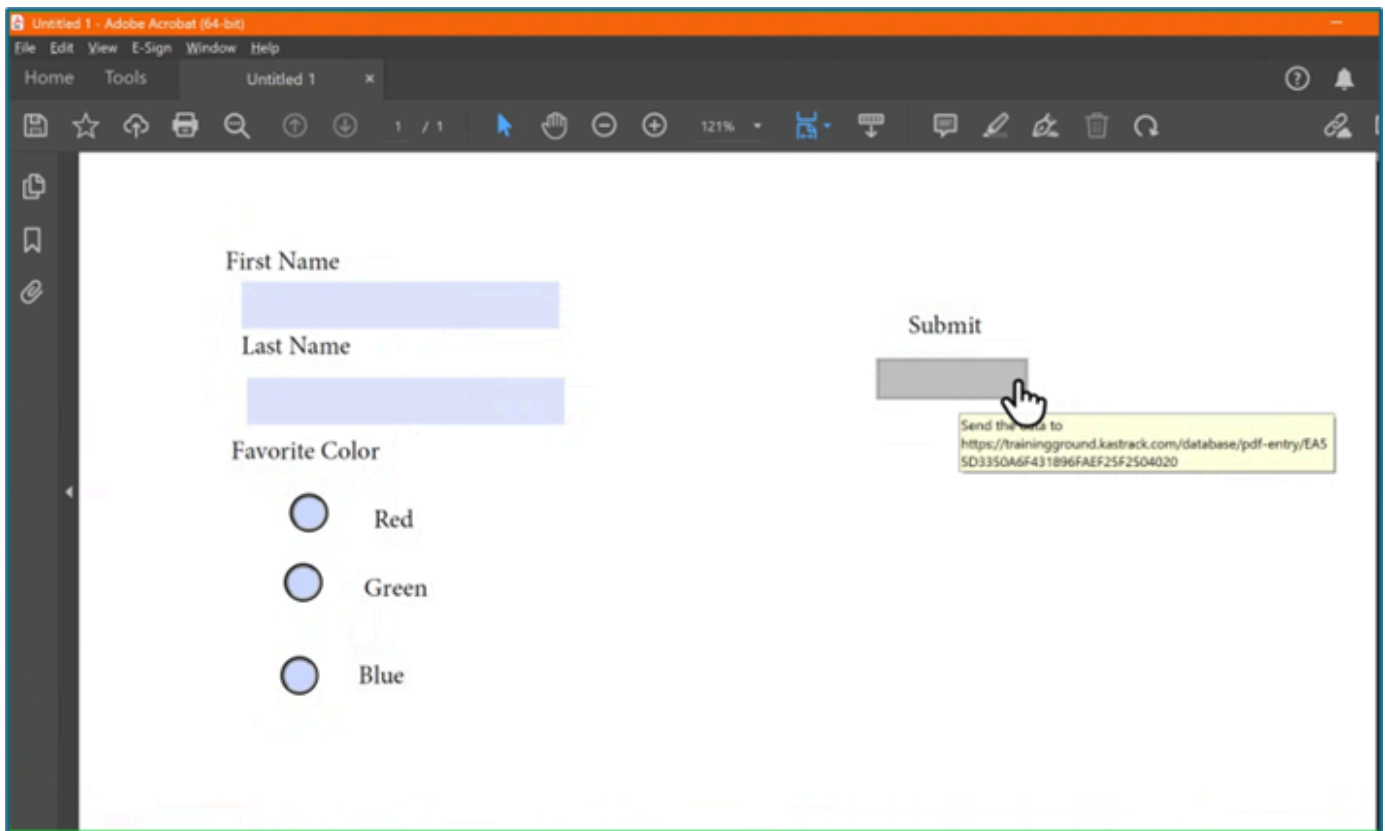


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in Kastrack.

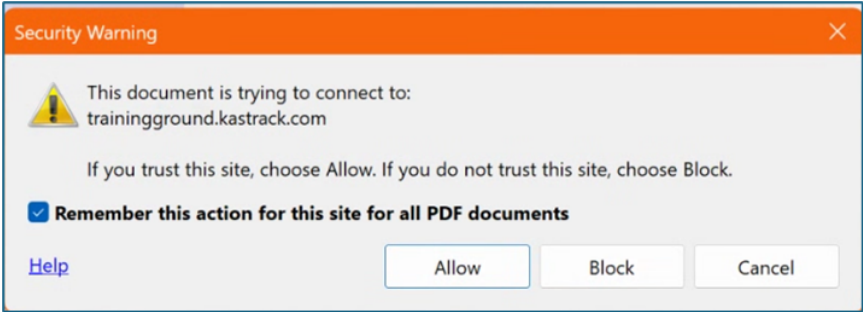


Confirm that the Export Format is “PDF The complete document”.

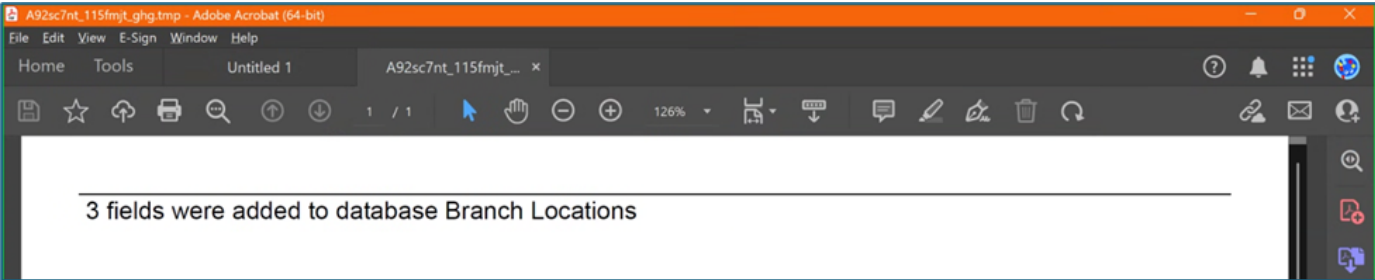


Open the PDF and submit the form to generate the fields here.

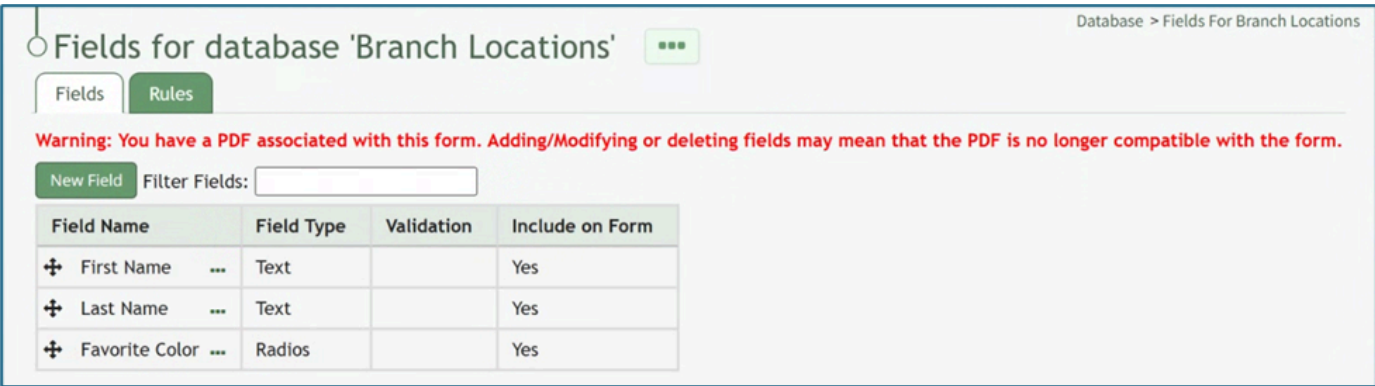
You do not need to fill in any of the fields, and you must not sign it.



Select “Allow” and the PDF will confirm that the fields were added to the database.

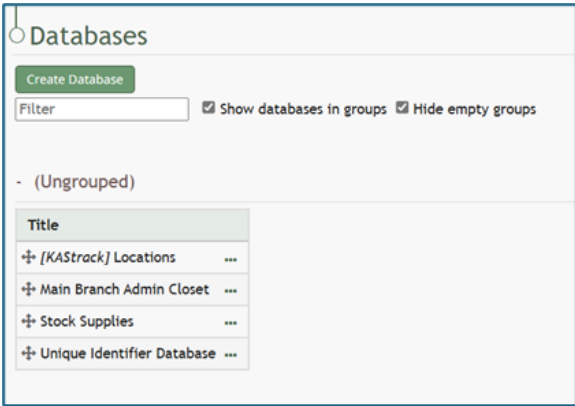


Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

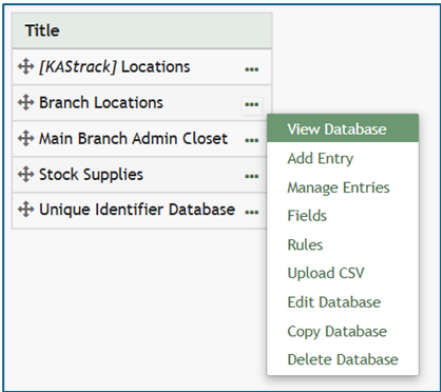


▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

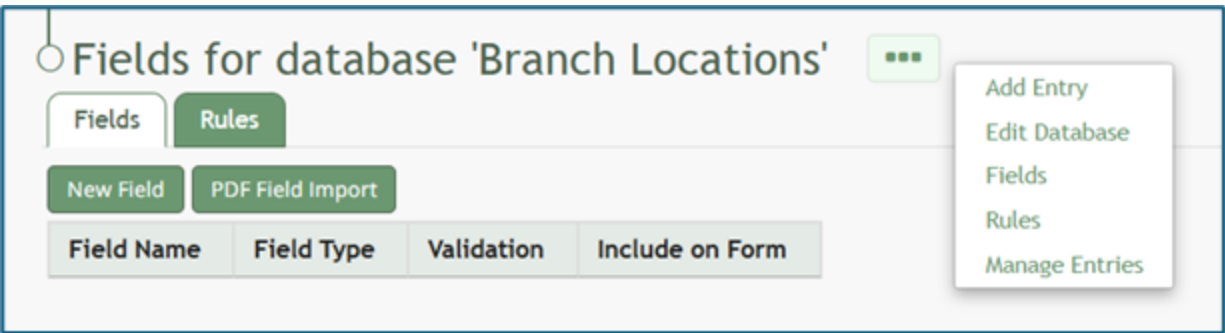


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, _ - and space only) *

Displayed Label

Field Type
Section Start

Form Fields

- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password

Formatting

- Section Start
- Section End
- Tabs Start
- Tabs End

Utility

- Information
- Calculated Field
- Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

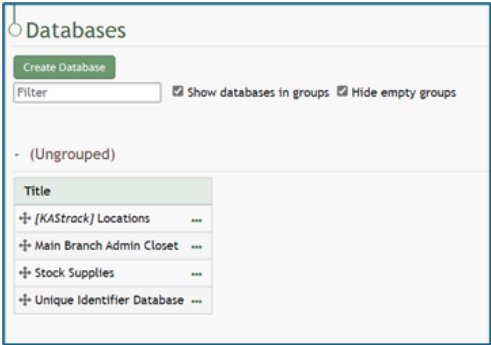
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

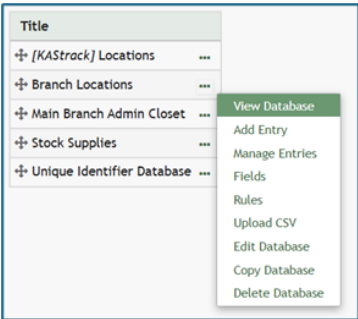
▼ How To: Add a Database Field

{{@321}}

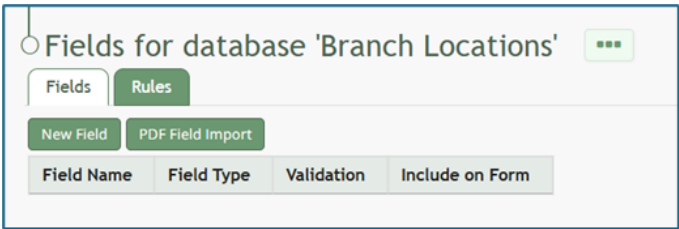
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



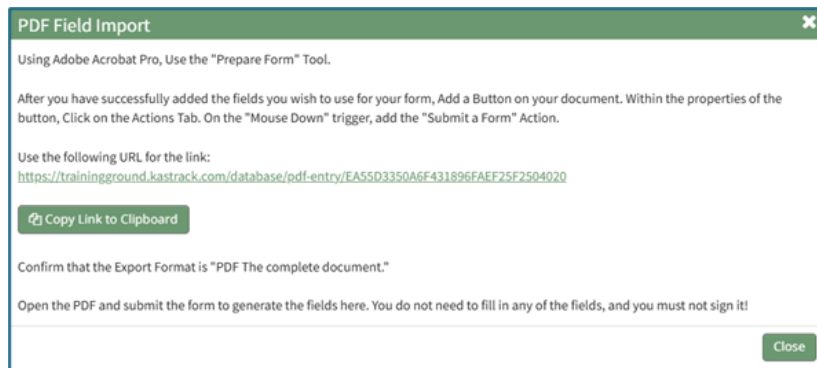
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



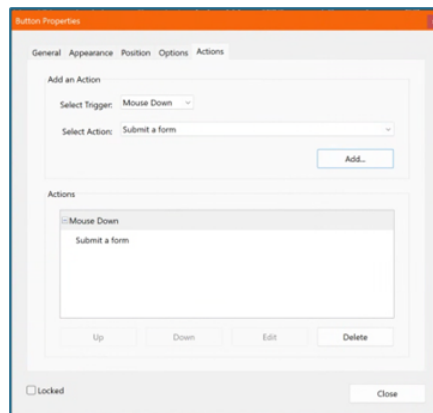
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

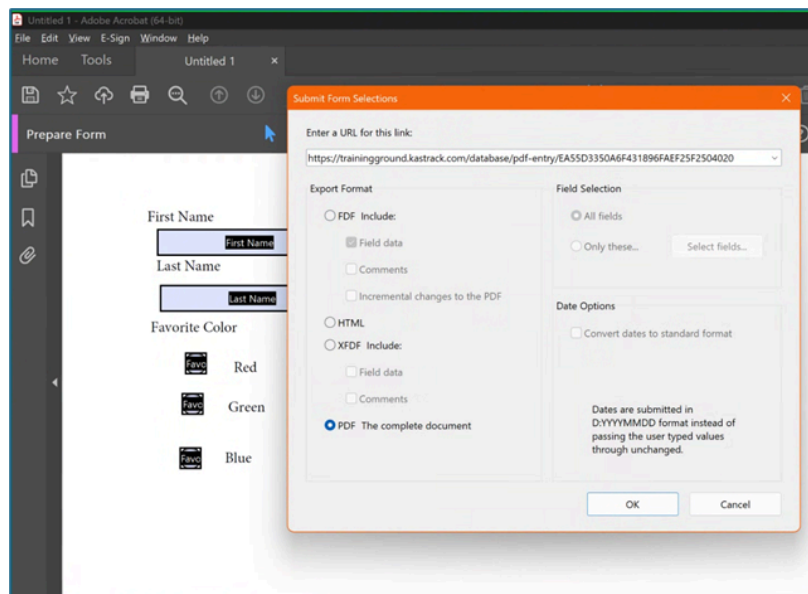


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

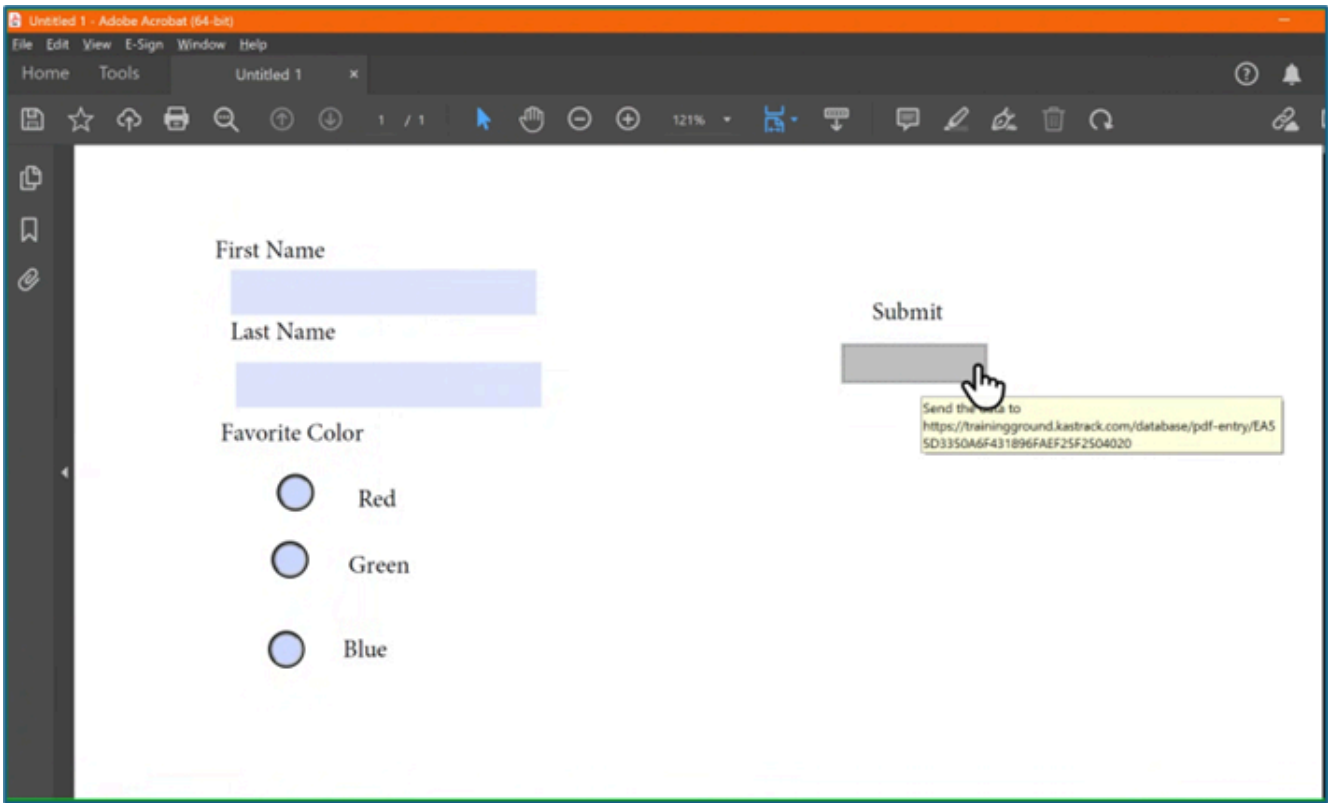


Within the button properties, click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

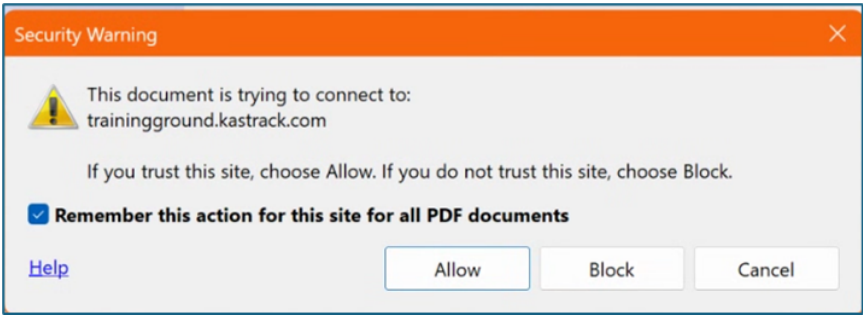


Confirm that the Export Format is "PDF The complete document".

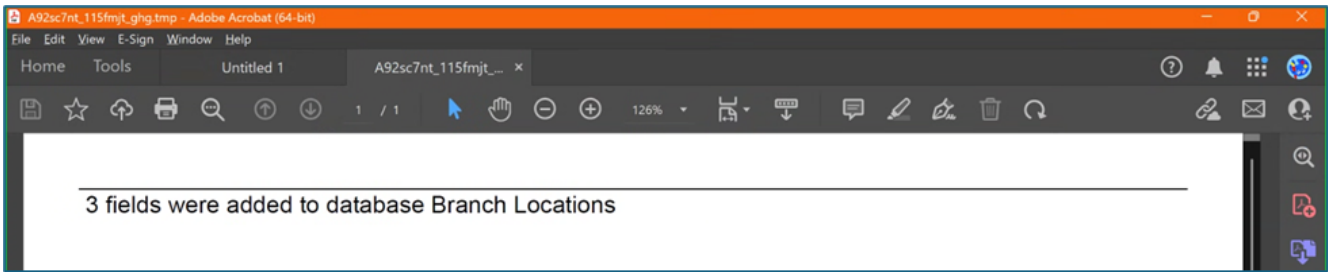


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

...

Database > Fields For Branch Locations

Fields

Rules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

Once you have entered database fields, you can add database entries into it.

▼ How To: Add an Individual Database Entry

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.

Title
+ [KAstrack] Locations ...
+ Branch Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

Edit Database

Copy Database

Delete Database

Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations
Shelf1 - Bin1

Items

Quantity

Part Type
Please Choose...

Category
Client

Save Cancel

New Database Entry

Shelf
Please Choose

Bin
Please Choose

Save Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

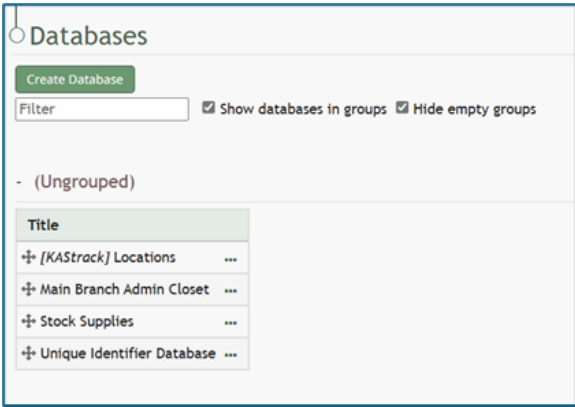
Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

▼ How To: Import Database Entries from a CSV

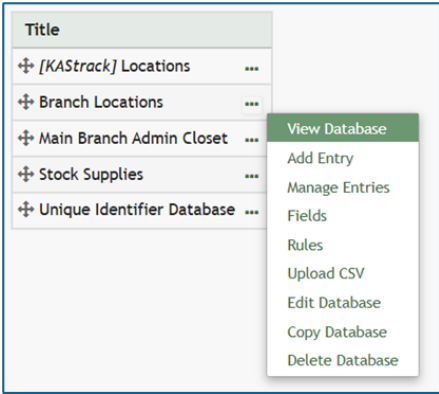
To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

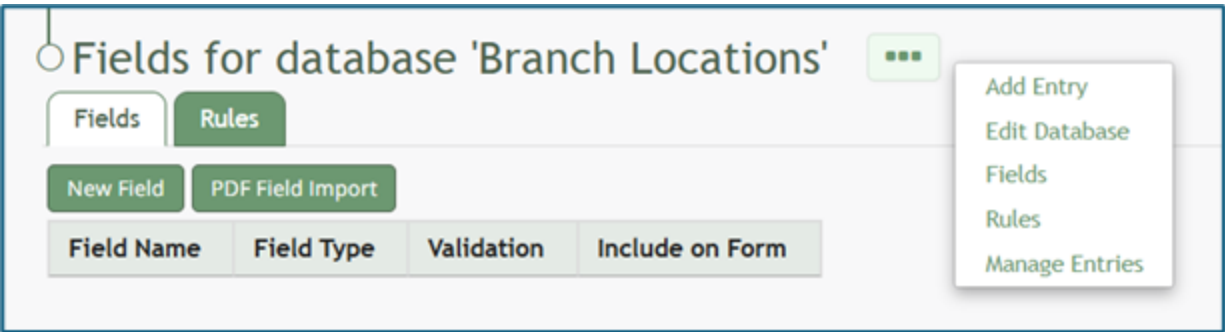


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

{{@340}}

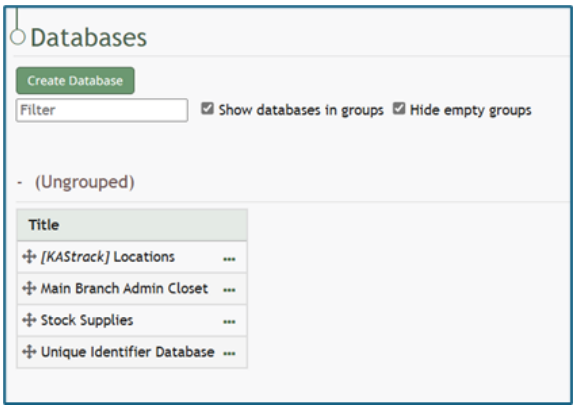
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

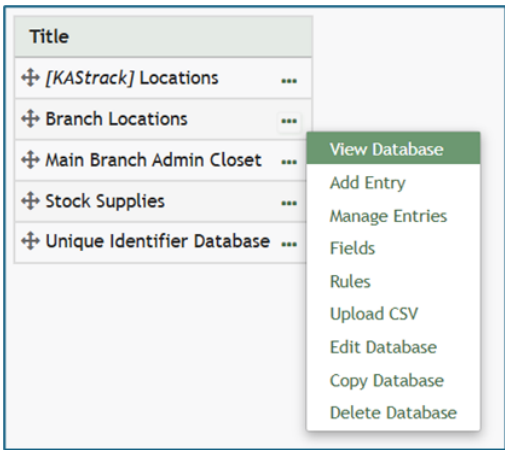
▼ How To: Add a Database Field

{{@321}}

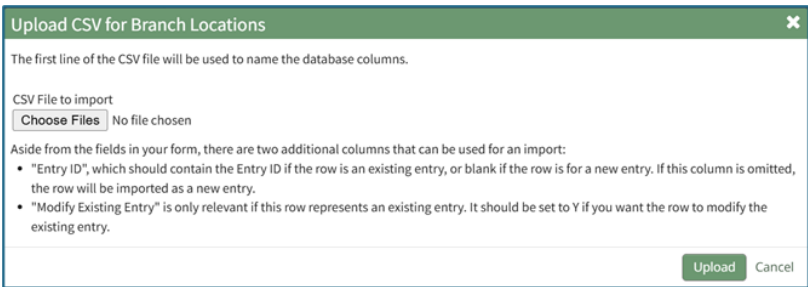
To import database field names from a CSV file, go to the Home Page of the Database Module.



Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Upload CSV" opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.

File name:	Business Account Fields
Save as type:	CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:	Business Account Fields	All files
Upload from mobile		Open
		Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business C

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name Type: Text Validation:	Name: City Type: Text Validation:	Name: State Type: Text Validation:	Name: Employee Count Type: Text Validation:	Name: Annual Revnue Type: Text Validation:
--	---	--	---	--

Import Now Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

○ CSV uploaded for Business Client Accounts

0 records imported
0 records updated
0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

○ Fields for database 'Business Client Accounts' ...

Fields Rules

New Field Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name ...	Text		Yes
+ City ...	Text		Yes
+ State ...	Text		Yes
+ Employee Count ...	Text		Yes
+ Annual Revnue ...	Text		Yes
+ Account Manager ...	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

○ Databases

Create Database

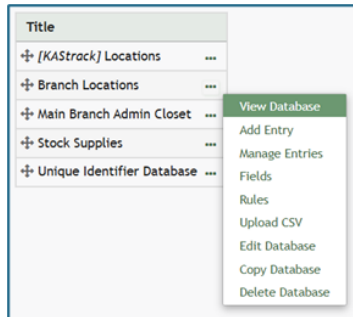
Filter

☒ Show databases in groups ☒ Hide empty groups

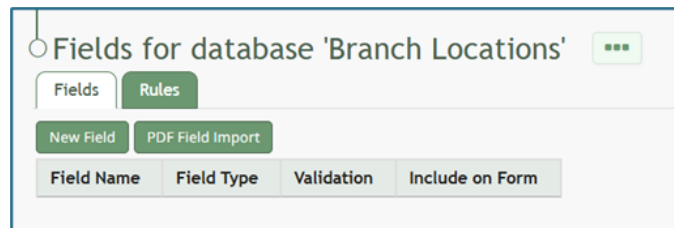
- (Ungrouped)

Title
+ [KASrock] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

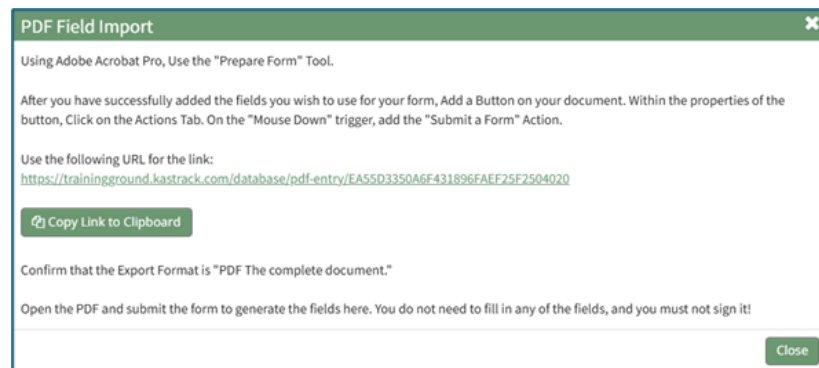
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



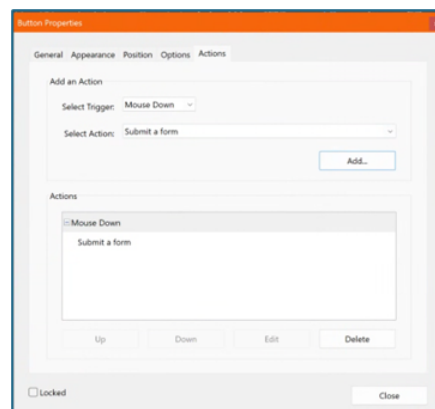
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

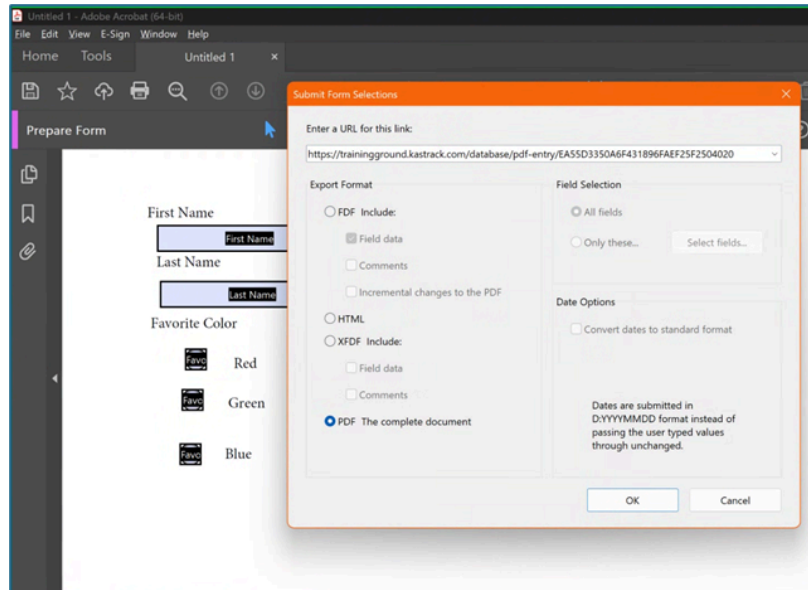


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

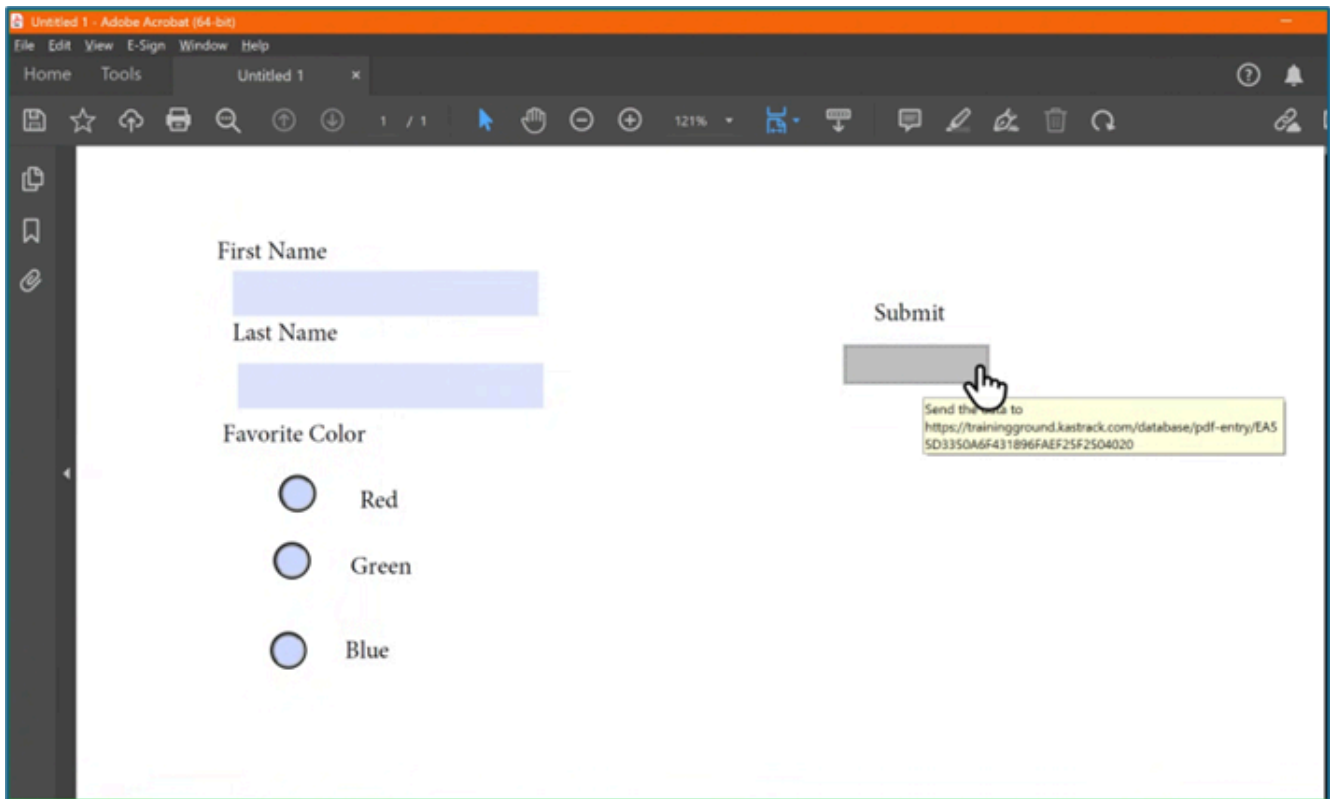


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

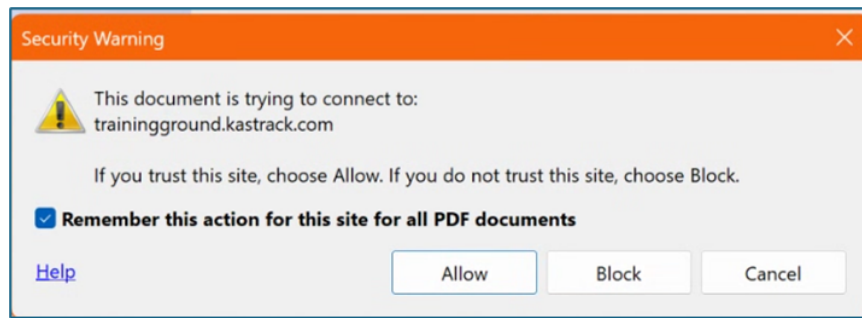


Confirm that the Export Format is “PDF The complete document”.

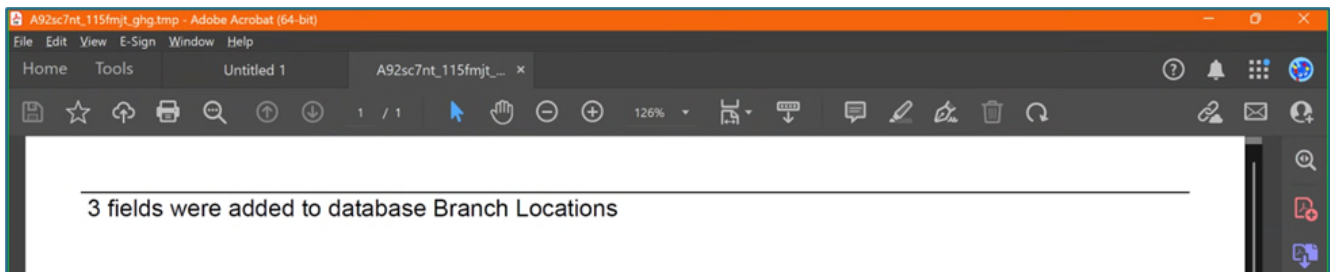


Open the PDF and submit the form to generate the fields here.

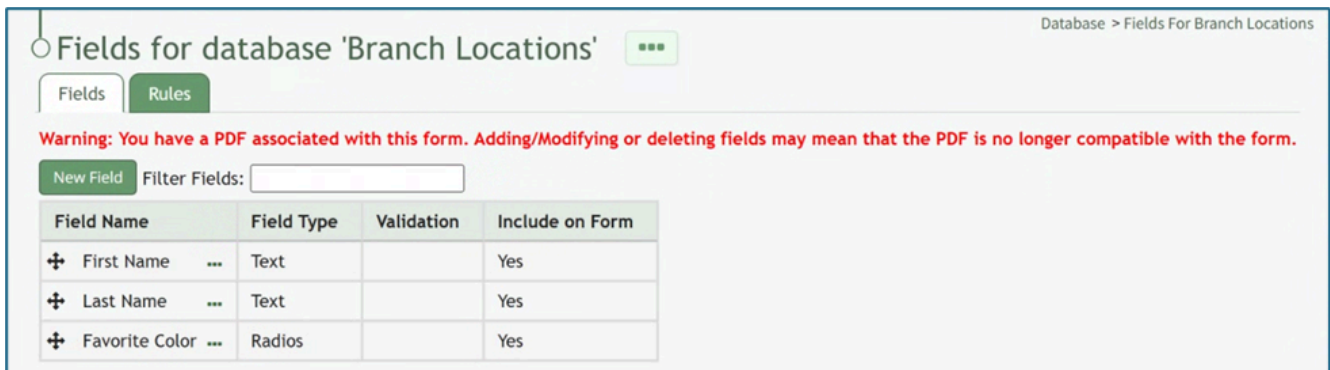
You do not need to fill in any of the fields, and you must not sign it.



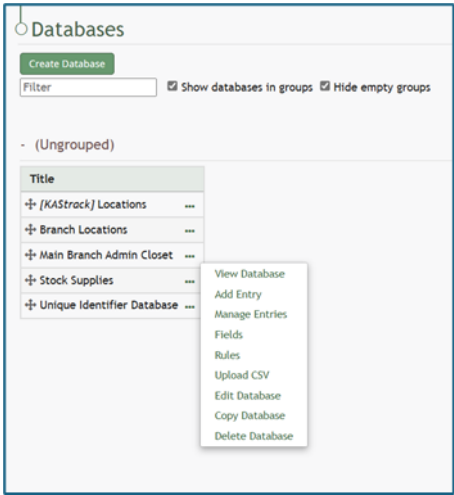
Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

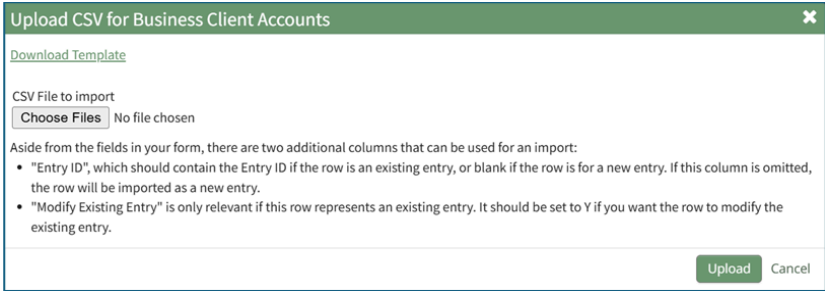


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ **Notes Regarding the Downloadable Template for Uploading CSV Files**

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified.

Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ...

Add EntryImport EntriesExport Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

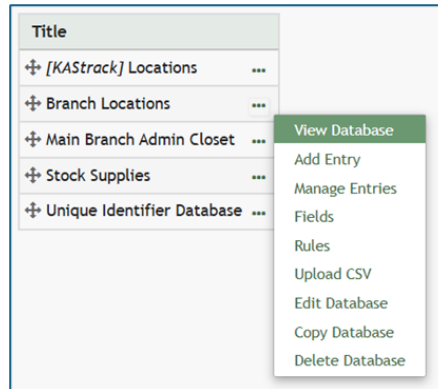
Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

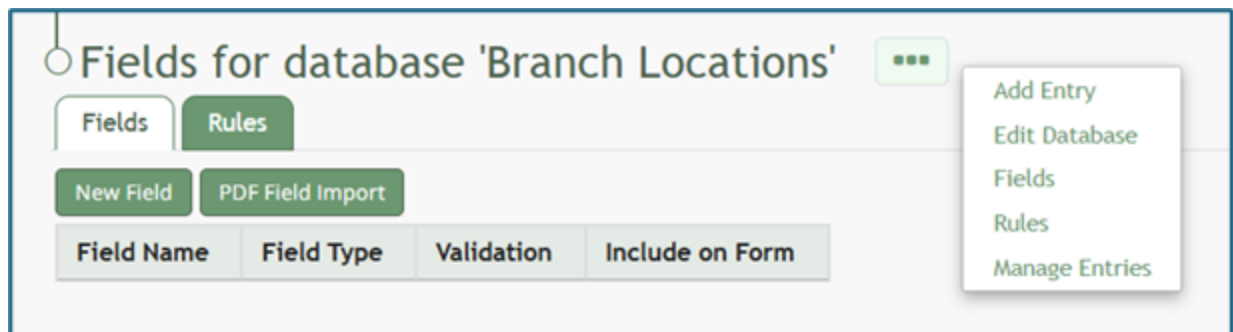
Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Fields" opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the "New Field" button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select "Add Entry".



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, . and space only) *

Displayed Label

Field Type

Section Start ▼

Form Fields

Text

Text Box

HTML Text Box

Checkbox

Dropdown

Radios

Date

Date/Time

File Upload

Image

Password

Formatting

Section Start

Section End

Tabs Start

Tabs End

Utility

Information

Calculated Field

Sequential Number

< >

px, B: px, L:

px, B: px, L:

section end. All CSS styles must
display css style for a section.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

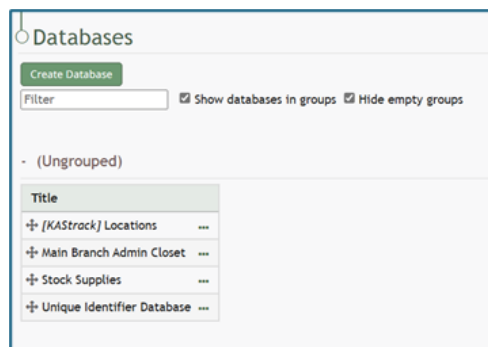
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

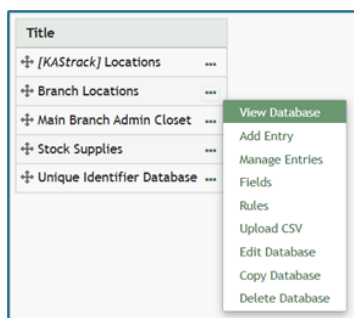
▼ How To: Add a Database Field

 $\{\{ @321 \}\}$

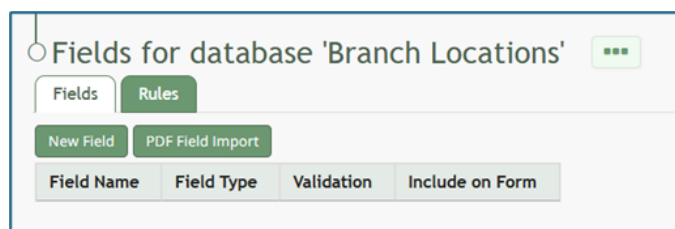
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



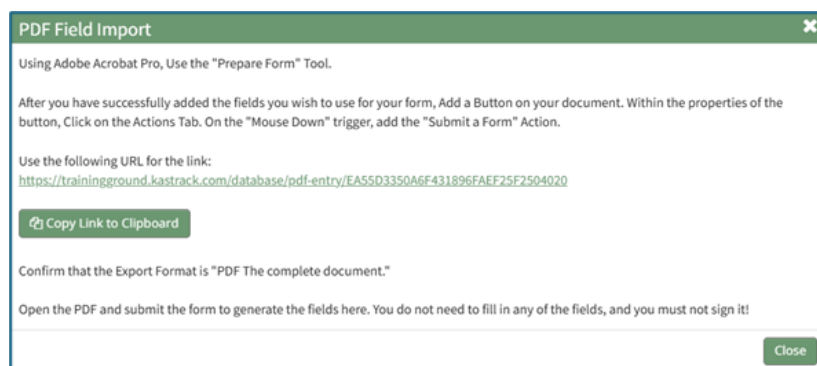
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



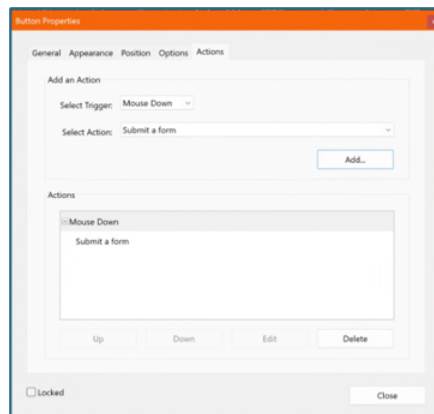
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

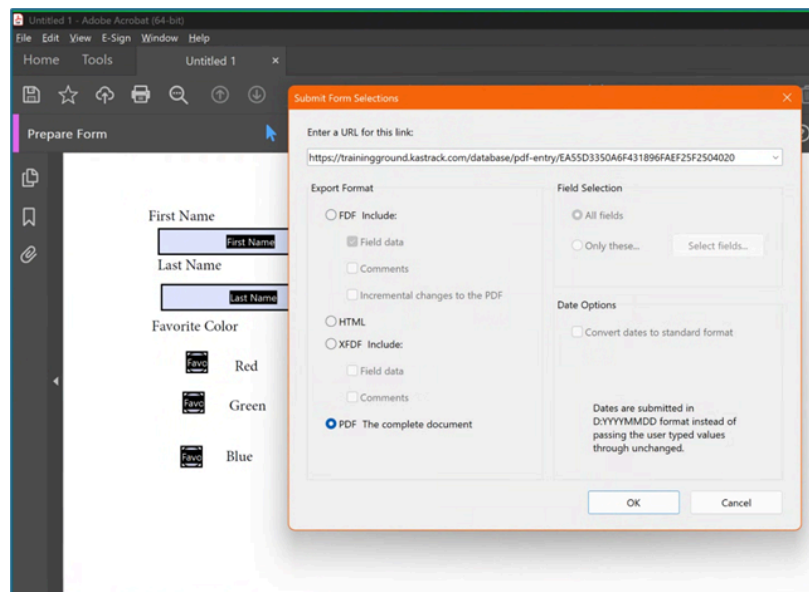


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

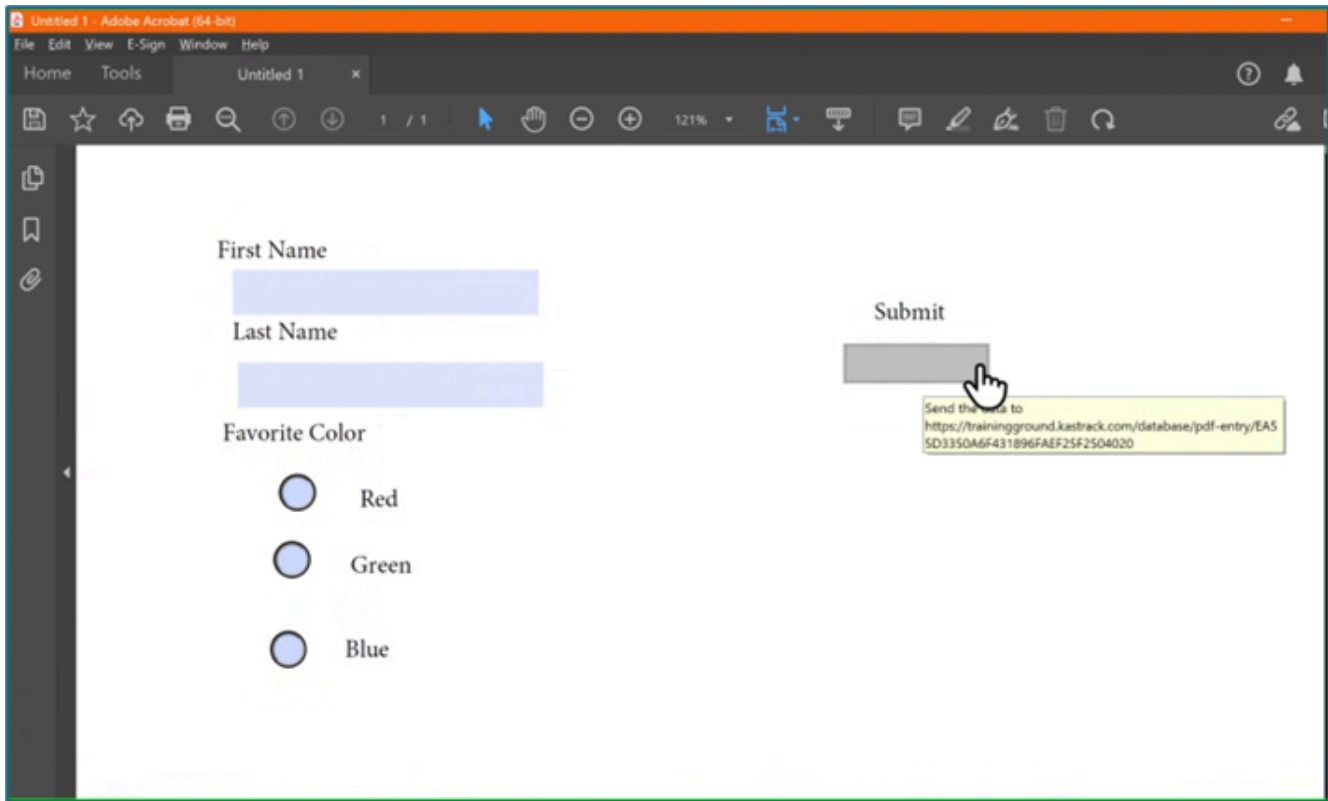


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

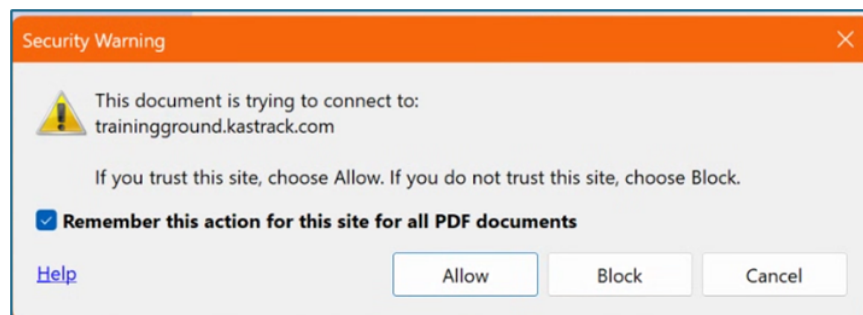


Confirm that the Export Format is “PDF The complete document”.

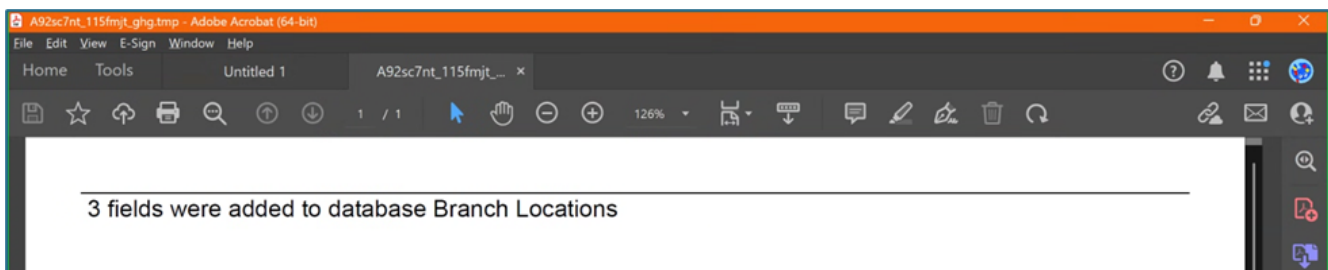


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

...

Database > Fields For Branch Locations

Fields

Rules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

To import database field names from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.

Title
+ [KAStrack] Locations ...
+ Branch Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

Edit Database

Copy Database

Delete Database

Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

Upload CSV for Branch Locations

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

No file chosen

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.

File name: Business Account Fields

Save as type: CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name: Business Account Fields

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business C

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name	Name: City	Name: State	Name: Employee Count	Name: Annual Revnue
Type: Text	Type: Text	Type: Text	Type: Text	Type: Text
Validation:	Validation:	Validation:	Validation:	Validation:

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

○ CSV uploaded for Business Client Accounts

0 records imported
0 records updated
0 records failed to import
[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

○ Fields for database 'Business Client Accounts' ⋮

FieldsRules

New FieldFilter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name	Text		Yes
+ City	Text		Yes
+ State	Text		Yes
+ Employee Count	Text		Yes
+ Annual Revnue	Text		Yes
+ Account Manager	Text		Yes

Stock Database

The Stock Database is created for general or stock inventory items that do not have a unique identifier. The fields included in the Stock Database will show on the modal for each stock item in the inventory. All inventories are required to integrate with a stock database.

Withdrawal Slips

Adjust Stock

Current Stock: 2500

☐ Increase By

☒ Decrease By

☐ Set to

Stock after saving: 2500

Save Adjustment

Stock Details

Locations

Shelf1 - Bin2

Items

Withdrawal Slips

Quantity

2500

Part Type

Generic

Category

Client

Stock Log

Edit

Close

Bolt Depot - Flange Bolt: full thread 10mm x 1.25mm

Adjust Stock

Current Stock: 61

☐ Increase By

☒ Decrease By

☐ Set to

Stock after saving: 61

Save Adjustment

Stock Details

Location

Alberta - Storage - Bin 01

Title

Flange Bolt: full thread 10mm x 1.25mm

Quantity

61

Part Type

Generic

Category

Hardware

Manufacturer

Bolt Depot

Vendor

Billy's Bolts 555-1212

Image



Stock Log

Edit

Close

Your stock database can include a variety of fields, but for the Inventory Module to function properly there are required fields.

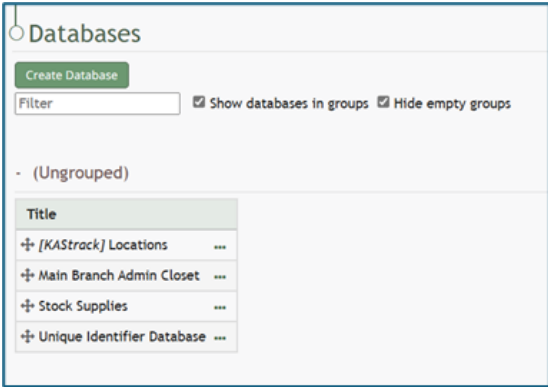
Stock Database Requirements	
Required Fields*	Explanation
Location	Inventory location can be defined through a single database, or multiple databases if desired.
Inventory Item Title	This field will be used to identify the stock inventory item. Some examples of possible field names include title, item, part, etc. The Title will be comprised out of fields in the stock database.
Quantity	This field will state the number of stock items currently in the inventory.
Part Type	A inventory item must be specified as generic or unique if the inventory is integrated with a unique items database. Part Type is only a required field if you have both a stock and a unique database.
* The actual field name for required fields can be customized to your preference.	

▼ How To: Create a Stock Database

To create a stock database, go to the Home Page of the Database Module and create a new database. Click the “Create Database” button and input a database title and description. Select the appropriate database group from the dropdown menu. You can use default access parameters, or customize database specific parameters.

▼ How To: Create a Database

To create a new database, go to the Home Page of the Database Module.



Click the “Create Database” button, opening the New Database Modal.

New Database

Title *

Group

(No Groups Created)

Description

Tags

Select Some Options

☒ Allow Default Access

Input a Title for the new database. Select any groups the database should be associated with. Provide a description of the database and its purpose in the textbox provide. Select any tags desired.

Select the “Allow Default Access” checkbox to indicate that the database should follow the defaults established by module and access levels. If this checkbox is not selected, you will be required to establish user specific access based on individual or certification roles.

Additional Database Specific Permissions

Admins

Select Some Options

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Select Some Options

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save Cancel

The following database specific permissions are selected via drop down menu lists that include all individuals and certification roles that can be assigned permission.

Admins allows users or role to have admin module level permissions for this particular database. A list of all admin module level permissions is shown in the table below.

Database Admin Module Level Permissions
Manage roles (add/view/edit/delete, assign hidden roles, role permissions)
Database (view/edit/delete/list/add, upload csv)
Database Fields (edit/delete/view/list)
Database Entry (view/edit/delete/list/add)
Can delete entries from other modules
Database draft entries (abandon drafts from guests/users, view drafts from users/guests, list

drafts from user/guests, reassign)
Database Group (list/add/edit/delete/view)

Manage Entry Permissions gives the indicated users permission to view, add, edit, and delete database entries.

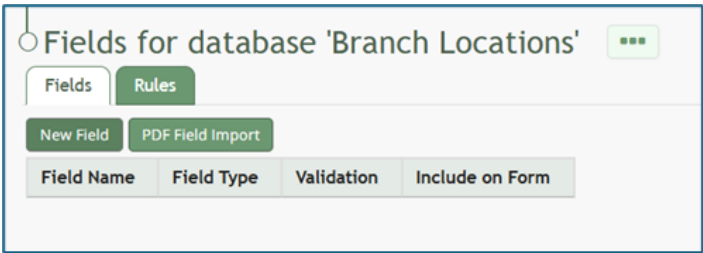
View Entry Permissions gives the indicated users permission to view database entries.

Allow Integration With denotes which other modules can link with and integrate with this database or forms for reference.

The Database Module can be integrated with the following modules:

- Forms
- Database
- Inventory
- Grid

Click “Cancel” and return to the Database Module Home Page without any changes being made. Select “Save” to create the new database and you will be directed to the Fields Table for your newly copied database.



Once a database has been created, you can enter database fields into it.

▼ How To: Import Fields from a CSV File Into a Database

To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

{{@321}}

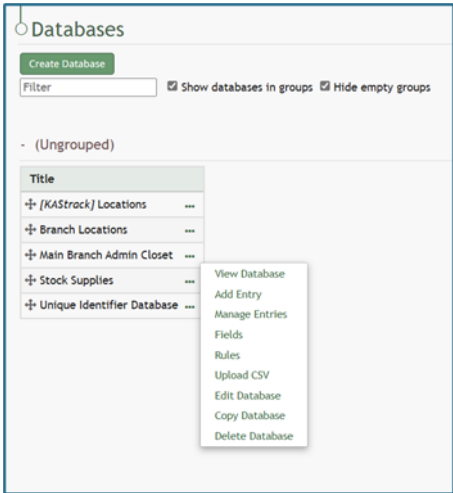
▼ How To: Import Fields from a CSV File Into a Database

{{@339}}

▼ How To: Import Fields from a PDF Field Import

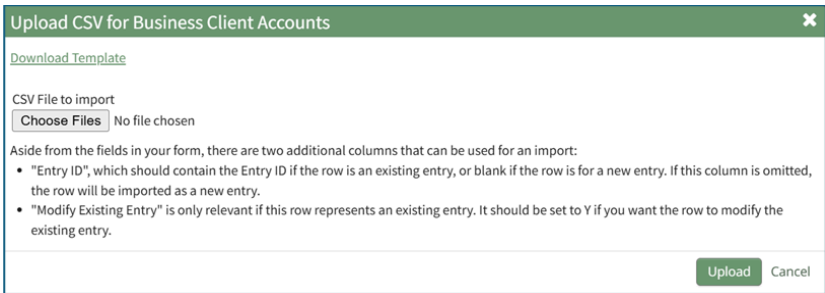
{{@340}}

To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are

not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

○ CSV uploaded for Business Client Accounts

5 records imported
0 records updated
0 records failed to import
[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

○ Entries for database 'Business Client Accounts' ***

Add EntryImport EntriesExport Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revnue	Account Manager
19 ---	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18 ---	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17 ---	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16 ---	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15 ---	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Enironmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Import Fields from a PDF Field Import

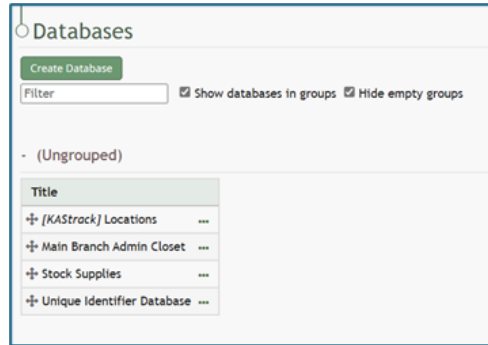
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

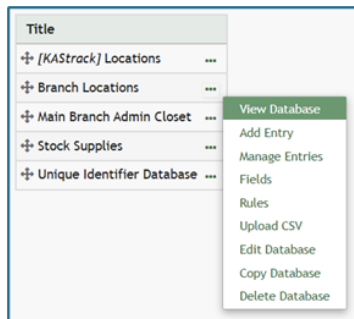
▼ How To: Add a Database Field

{{@321}}

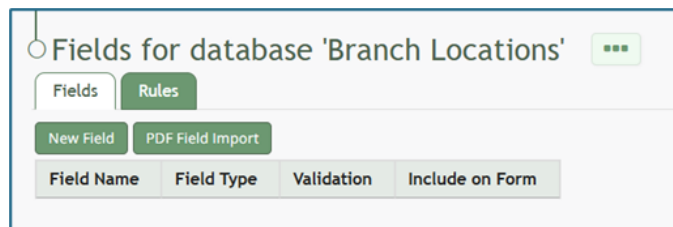
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



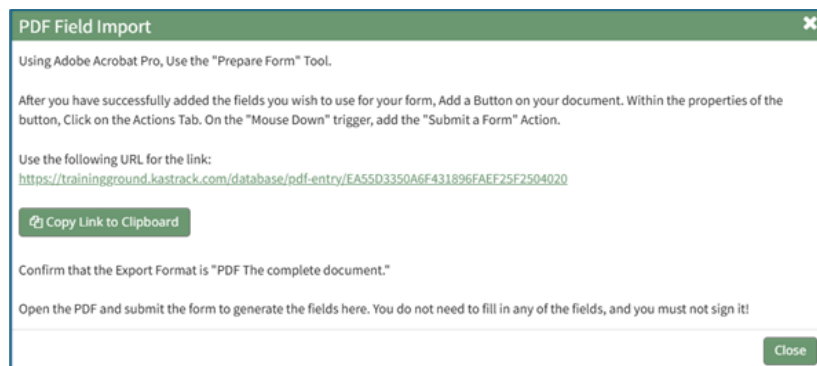
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



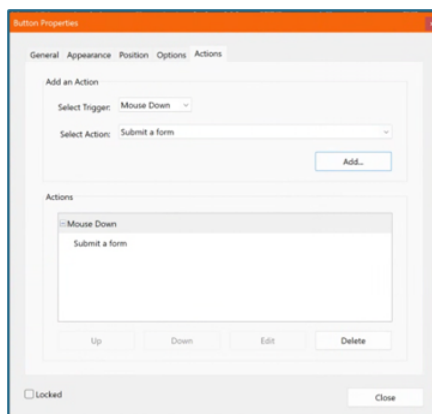
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

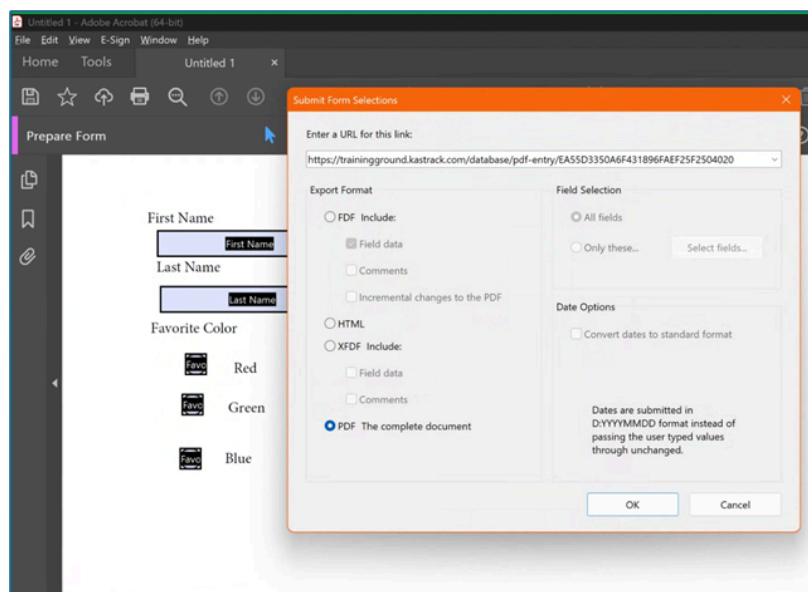


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

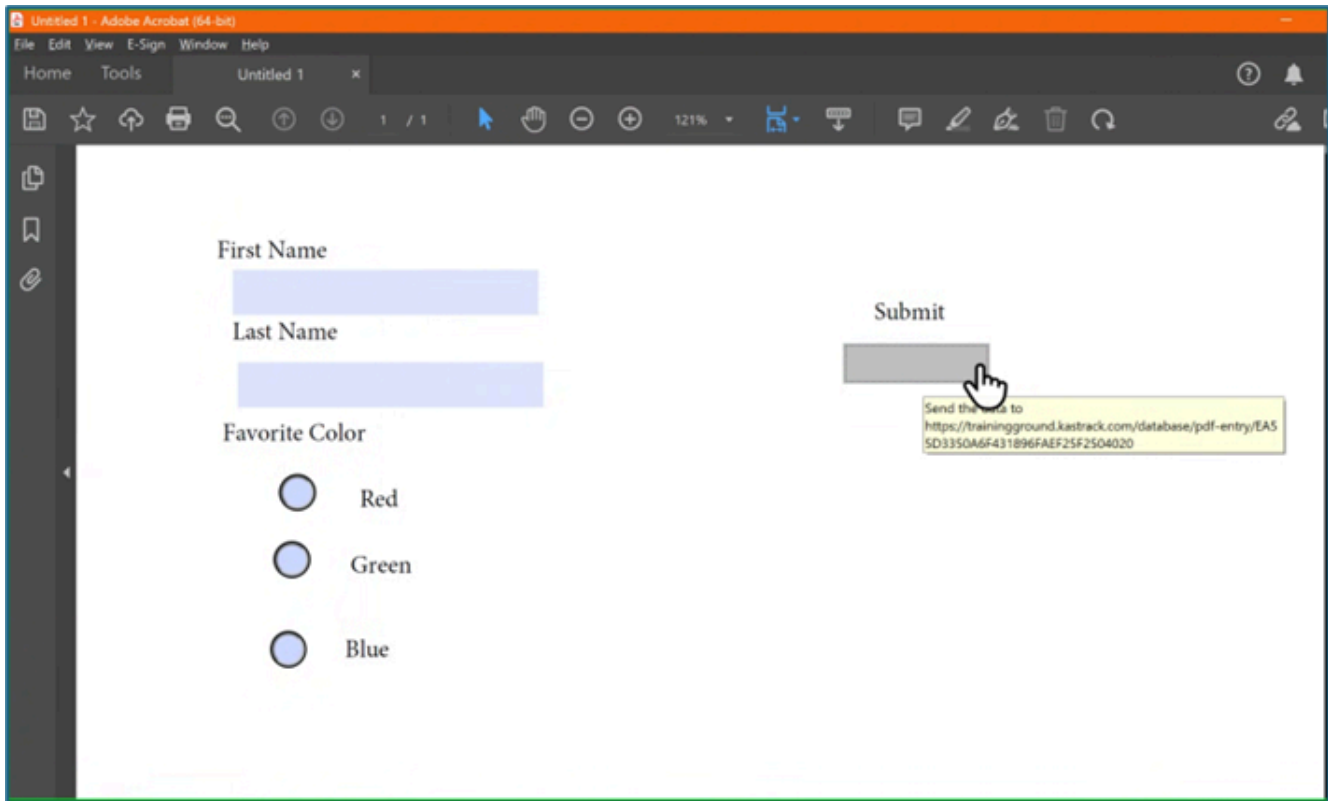


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

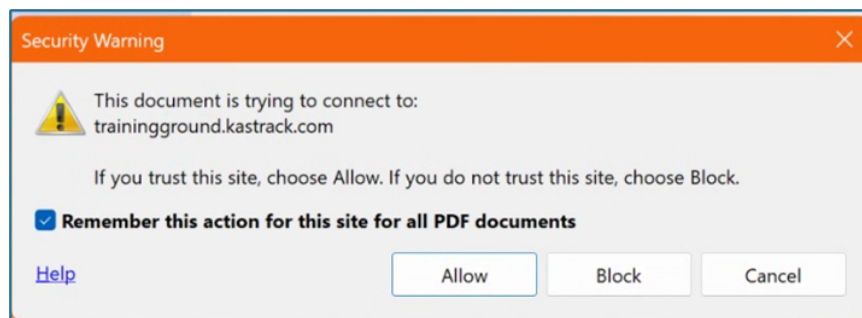


Confirm that the Export Format is “PDF The complete document”.

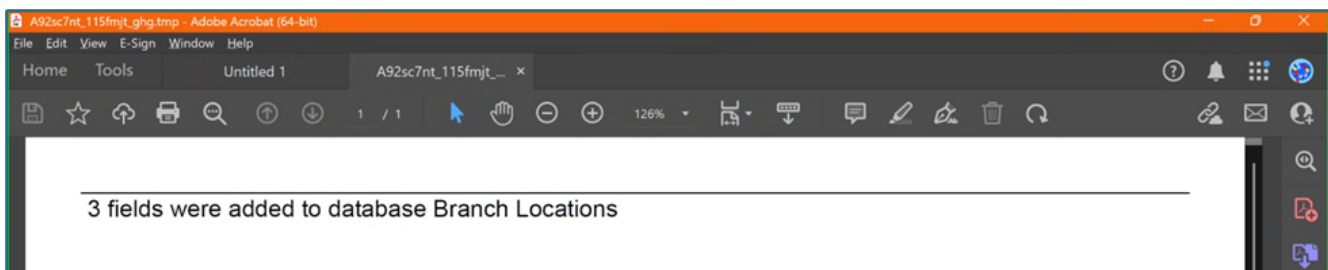


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

Database > Fields For Branch Locations

FieldsRules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New FieldFilter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

Filter

☒ Show databases in groups☒ Hide empty groups

- (Ungrouped)

Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.

Title

+ [KAStrack] Locations ...

+ Branch Locations ...

+ Main Branch Admin Closet ...

+ Stock Supplies ...

+ Unique Identifier Database ...

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

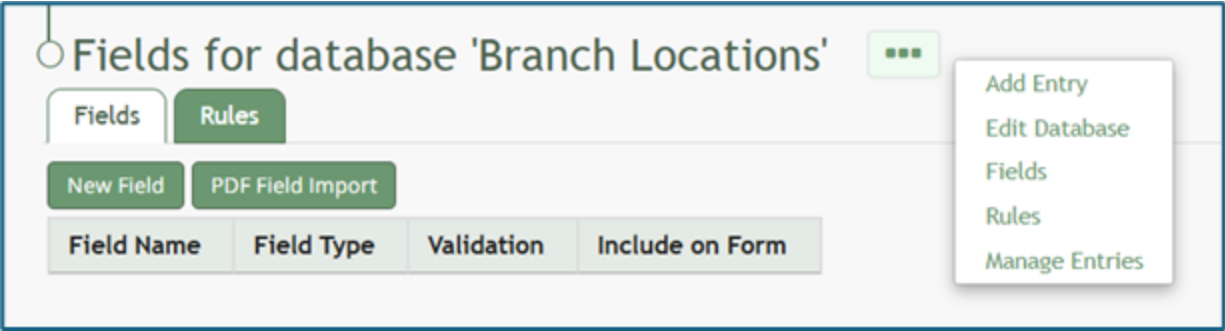
Edit Database

Copy Database

Delete Database

Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ **How To: Import Fields from a PDF Field Import**

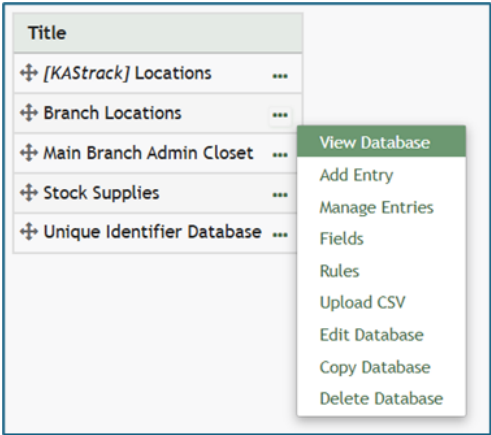
{{@340}}

Once you have entered database fields, you can add database entries into it.

▼ **How To: Add an Individual Database Entry**

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.



Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations

Shelf1 - Bin1

Items

Quantity

Part Type

Please Choose...

Category

Client

Save

Cancel

New Database Entry

Shelf

Please Choose

Bin

Please Choose

Save

Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save

Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

▼ How To: Import Database Entries from a CSV

To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

{{@321}}

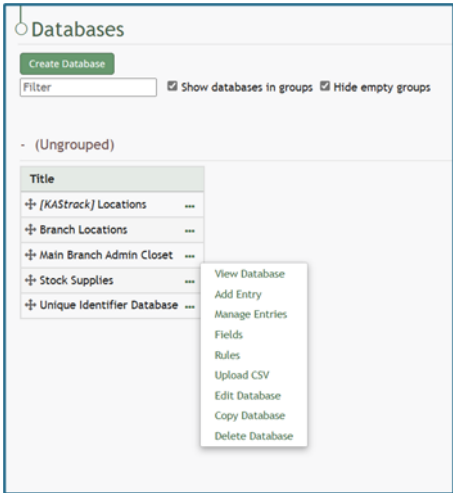
▼ How To: Import Fields from a CSV File Into a Database

{{@339}}

▼ How To: Import Fields from a PDF Field Import

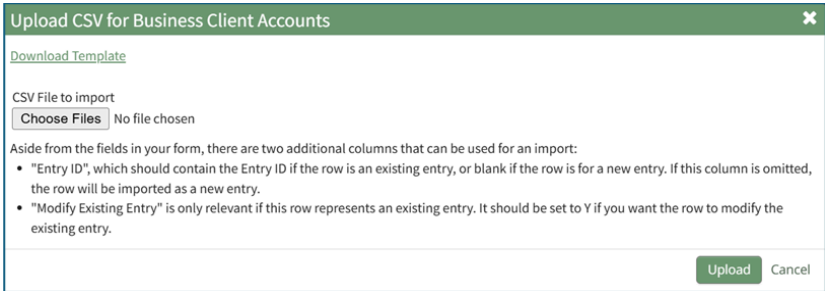
{{@340}}

To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:	Business Client Account Database Entries
Save as type:	CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:	Business Client Account Database Entries	All files
Upload from mobile		Open
		Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) • [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

New Database ✕

Title *

Stock Database

Group

Bank Administration

Description

Stock database for the main branch item inventory

Tags

Select Some Options

☒ Allow Default Access

Additional Database Specific Permissions

Admins

Miltzi Orkus (morkus) ✕

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Select Some Options

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save

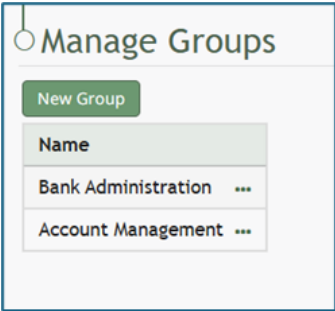
Cancel

Select “Save” and the system will direct you to the Fields Page, where new fields can be added. Your stock database can include a variety of fields, but for the Inventory Module to function properly there are required fields.

If no fields have been entered into the database yet, you can import fields in bulk via a PDF Entry or a CSV file. If fields have already been created in the database, new field must be added individually.

▼ How To: Add a Database Group

To add a database group, go to the Groups Page of the Database Module.



Select the “New Group” button opening the New Group Modal.

New Group

Name *

Save

Cancel

Input the desired name of the new group and select the “Save” button.

The new group will now show in the Group Table.

Manage Groups

New Group

Name

Bank Administration

Account Management

Tangible Supplies

▼ How To: Import Form Fields from a CSV File

To import form entries from a CSV, form fields must have already been created.

▼ How To: Add a Field to a Form

To add a field to a form, go to the Home Page of the Forms Module. . Click the three-dot icon to the right of the form title that you want to add a field to opening the Form context menu. Select “Fields”.

Forms Home

Manage Forms

Create Form

Convert Database to Form

Form Aggregation

Create Group

Filter

All but archived

Show forms in groups

Hide empty groups

(Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Branch Locations	Live	0	3	0
Confidentiality & Data Privacy Agreement	Not Live - Preview Mode	0	0	0
Family Information Form	Overview	0	0	0
New Form	Webform (popup)	0	0	0

Edit Form

Copy Form

Make form Live

Delete All Entries

Fields

Rules

Upload PDF

This opens the Fields Tab for the specific form of interest.

There are two ways to add an individual field to the Fields Table from here. Click the “New Field” button opening the New Form Field Modal.

New Form Field

Field Name (a-z, A-Z, 0-9, _ - and space only) *

Displayed Label

Field Type

Text

☒ Include on Form

☐ Start Hidden

☒ Show in View/Manage Entries

☐ Force capitalization

☐ Treat as Link

Default

Placeholder Text (Max 25 characters)

Context Sensitive Help

Validation

Optional : Optional

Validation Help

CSS Classes

Save Cancel

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Form Field Modal will vary based on the Field Type.

Possible field types in the Forms Module include Form Fields, Formatting Fields, Utility Fields, Account Fields, and Reference a Database Entry. For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Forms Module in the User Manual.

A form field can only have on field type. If you need to utilize another (e.g., formatting purposes), you can set the displayed label to be the same but the field label must be unique.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Fields Table on the Fields Tab.

Fields for form 'Branch Locations'

Overview

Fields

Rules

Warning: This form is In Live status.

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Webform (popup)

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name	Text		Yes
+ Last Name	Text		Yes
+ Favorite Color	Radios		Yes
+ Age	Text		Yes

Fields can also be imported in bulk into a Form from a CSV file or PDF Field Import.

▼ How To: Import Form Fields from a CSV File

{{@402}}

▼ How To: Import Fields from a PDF Field Import

{{@400}}

▼ How To: Import Form Fields from a CSV File

To import form entries from a CSV, form fields must have already been created.

▼ How To: Add a Field to a Form

{{@373}}

▼ How To: Import Form Fields from a CSV File

{{@402}}

▼ How To: Import Fields from a PDF Field Import

{{@400}}

To import form entries from a CSV, go to the Home Page of the Forms Module and click the three-dot icon to the right of the form you wish to import entries into. Select “Manage Entries”.

Forms Home

Manage Forms

Create Form

Convert Database to Form

Form Aggregation

Create Group

Filter

All but archived

Show forms in groups

Hide empty groups

(Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Business Client Accounts	Not Live - Preview Mode	0	0	0
Confidentiality & Data Privacy Agreement	Overview	0	0	0
Family Information Form	Webform (popup)	0	0	0

Copy Form

Make form Live

Delete All Entries

Fields

Rules

Upload PDF

Download PDF

Clear PDF Cache

Drafts

View Entries

Manage Entries

Delete Form

This opens the Manage Entries for (FORM NAME) Page.

Entries for form 'Business Client Accounts'

Add Entry

Import Entries

Export Entries

View Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revnue	Account Manager
No Matching Data									

Click the “Import Entries” button beneath the page header. This opens the Upload CSV for (FORM NAME) Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

No file chosen

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. Notes have been provided if you are using the downloadable template to Upload bulk CSV form entries.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the form fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not form fields: Entry ID and Modify Existing Entry.

If you are importing form entries and no entries have been added to the form yet, leave these columns blank in your upload.

If form entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave this column blank if the entry is new.

Save as type: CSV UTF-8 (Comma delimited)

After creating your Forms Entries CSV file, save it as a CSV UTF-8 for importing. Click the “Choose File” button on the Upload CSV Modal and open the relevant file from your personal device.

File name: Business Client Account Form Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files Business Client Account Form Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Ignore the first 1 rows Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now Cancel

The entries imported from the CSV file will now show on the Upload CSV for (FORM NAME) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.



CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) • [Entries for Business Client Accounts](#)

Click the “Entries for (FORM NAME)” link to see all imported entries on the Manage Entries Page.

▼ How To: Import Fields from a PDF Field Import

Importing fields from a PDF Field Import has multiple purposes. Not only will the form fields be generated through this process, the PDF will also be saved by the system, so that future form entries can be downloaded into this PDF, allowing for customizable outputs.

A form must have already been created with no fields added for this method to work. If a field has already been added to the form, you are no longer able to bulk import form field names from a PDF Field Import. You are now required to enter each field name individually. Regardless, you can still upload a PDF Form that the system will use for future form entry downloads.

▼ How To: Create a Form

{{@386}}

▼ How To: Add a Field to a Form

{{@373}}

▼ How To: Upload a PDF Form

{{@408}}

To import field names from a PDF file, go to the Home Page of the Forms Module.

Select the three-dot icon to the right of the Form Title opening the Form's context menu.
Select "Form".

The screenshot shows the 'Forms Home' interface. Under 'Manage Forms', there are buttons for 'Create Form', 'Convert Database to Form', 'Form Aggregation', and 'Create Group'. Below these are filters: 'Filter', 'All but archived', and checkboxes for 'Show forms in groups' and 'Hide empty groups'. A table lists forms under the '(Ungrouped)' category. The table has columns: Title, Status, Drafts, Entries, and Pending Approval. The forms listed are 'Branch Locations', 'Confidentiality & Data Privacy Agreement', 'Family Information Form', and 'New Form'. A context menu is open for the 'New Form' entry, showing options: Overview, Webform (popup), Edit Form, Copy Form, Make form Live, Delete All Entries, Fields (highlighted), Rules, and Upload PDF.

Title	Status	Drafts	Entries	Pending Approval
Branch Locations	Live	0	3	0
Confidentiality & Data Privacy Agreement	Not Live - Preview Mode	0	0	0
Family Information Form	Overview	0	0	0
New Form	Webform (popup)	0	0	0

This opens the Fields Tab for a specific form. Select the "PDF Field Import" button.

The screenshot shows the 'Fields for form 'New Client Information'' page. There are three tabs: 'Overview', 'Fields' (selected), and 'Rules'. Below the tabs are three buttons: 'New Field', 'Webform (popup)', and 'PDF Field Import'. At the bottom, there are four columns: 'Field Name', 'Field Type', 'Validation', and 'Include on Form'.

This opens the PDF Field Import Modal.

The screenshot shows the 'PDF Field Import' modal. It has a title bar with a close button. The content includes instructions on using Adobe Acrobat Pro to prepare a form, a link to a training resource, and a 'Copy Link to Clipboard' button. At the bottom, there is a 'Close' button.

PDF Field Import

Using Adobe Acrobat Pro, Use the "Prepare Form" Tool.

After you have successfully added the fields you wish to use for your form, Add a Button on your document. Within the properties of the button, Click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the following URL for the link:
<https://trainingground.kastrack.com/database/pdf-entry/9EDE0BACF7F141B68FABD2E077515E59>

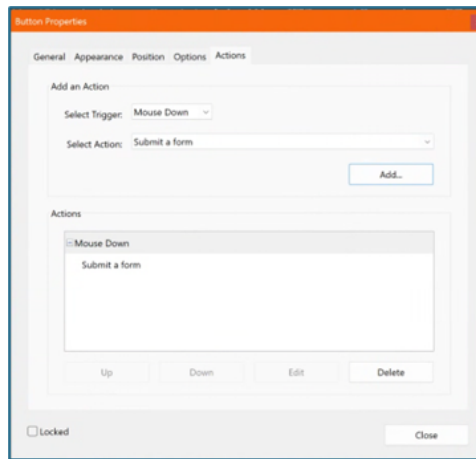
Copy Link to Clipboard

Confirm that the Export Format is "PDF The complete document."

Open the PDF and submit the form to generate the fields here. You do not need to fill in any of the fields, and you must not sign it!

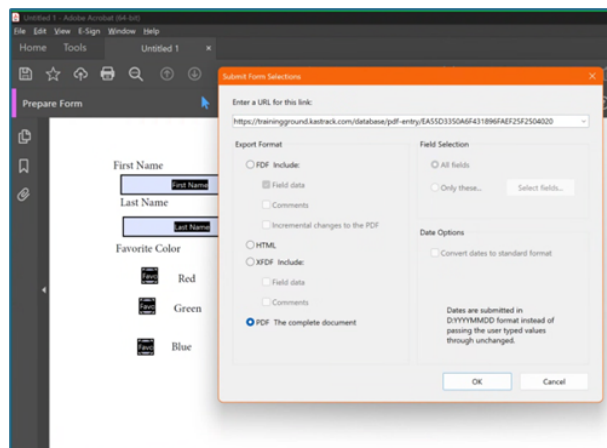
Close

To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

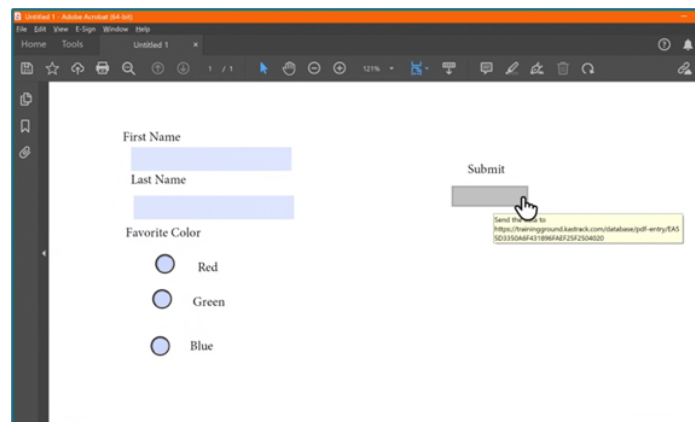


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

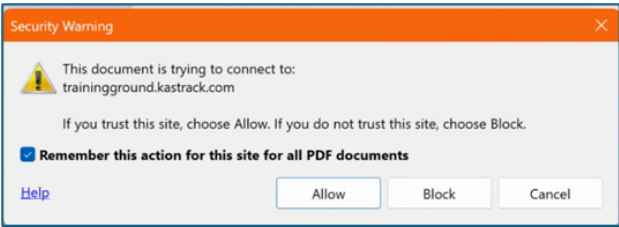


Confirm that the Export Format is “PDF The complete document”.

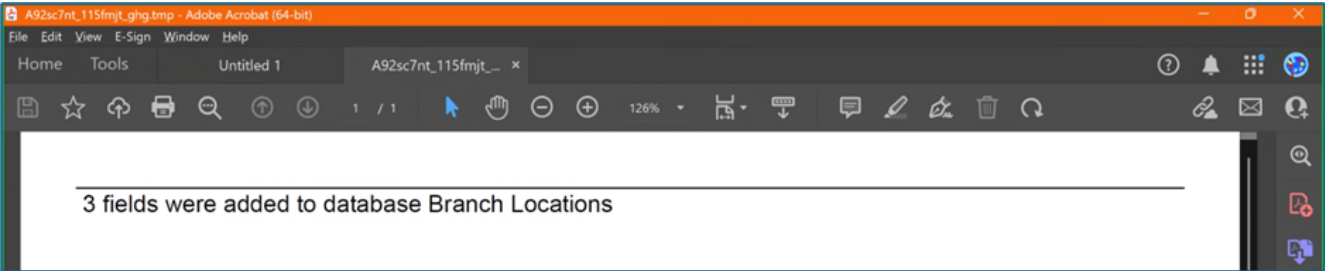


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.

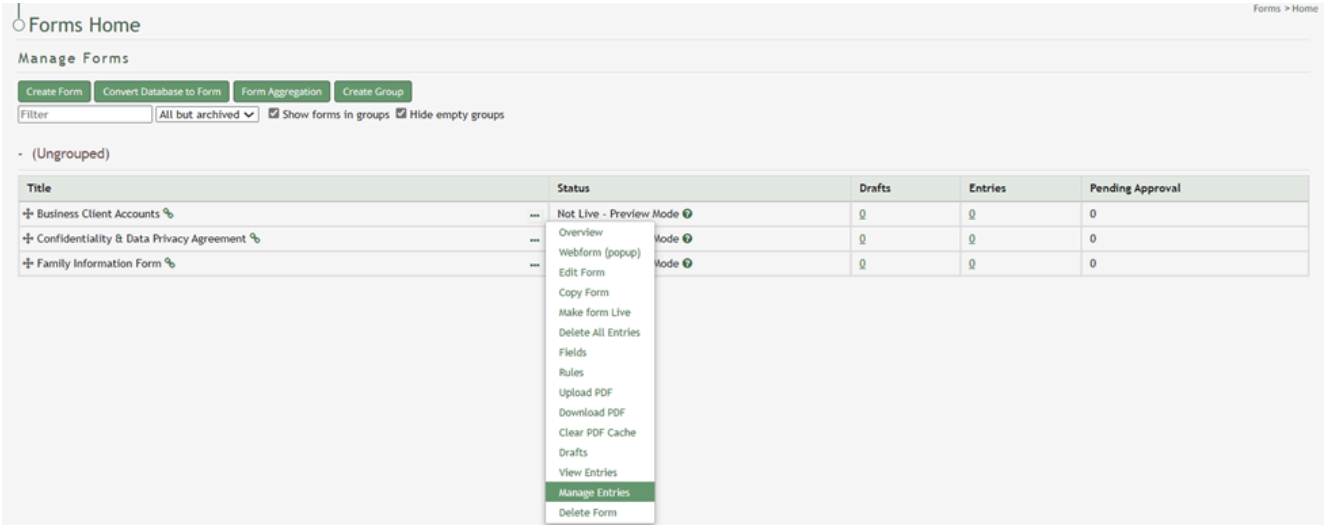


Select “Allow” and the PDF will confirm that the fields were added to the database.

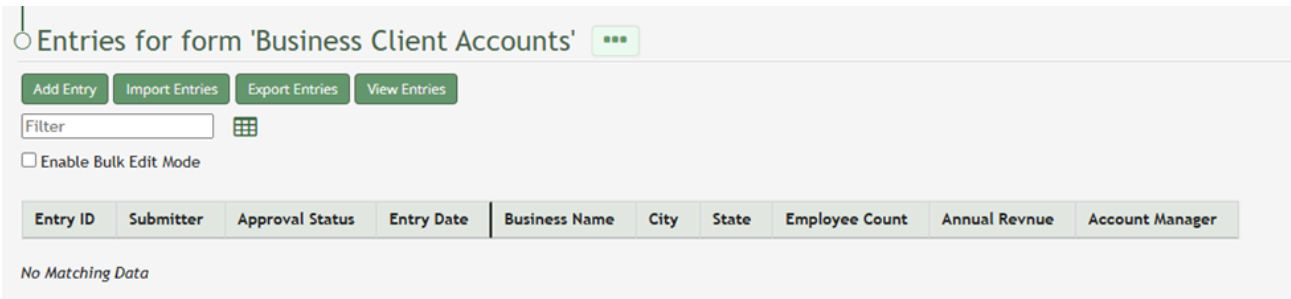


Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

To import form entries from a CSV, go to the Home Page of the Forms Module and click the three-dot icon to the right of the form you wish to import entries into. Select “Manage Entries”.



This opens the Manage Entries for (FORM NAME) Page.



Click the “Import Entries” button beneath the page header. This opens the Upload CSV for (FORM NAME) Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files
No file chosen

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload
Cancel

Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. Notes have been provided if you are using the downloadable template to Upload bulk CSV form entries.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the form fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not form fields: Entry ID and Modify Existing Entry.

If you are importing form entries and no entries have been added to the form yet, leave these columns blank in your upload.

If form entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave this column blank if the entry is new.

Save as type: CSV UTF-8 (Comma delimited)

After creating your Forms Entries CSV file, save it as a CSV UTF-8 for importing. Click the “Choose File” button on the Upload CSV Modal and open the relevant file from your personal device.

File name: Business Client Account Form Entries
All files

Upload from mobile
Open
Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Form Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Mattheis
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (FORM NAME) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) • [Entries for Business Client Accounts](#)

Click the “Entries for (FORM NAME)” link to see all imported entries on the Manage Entries Page.

▼ How To: Import Fields from a PDF Field Import

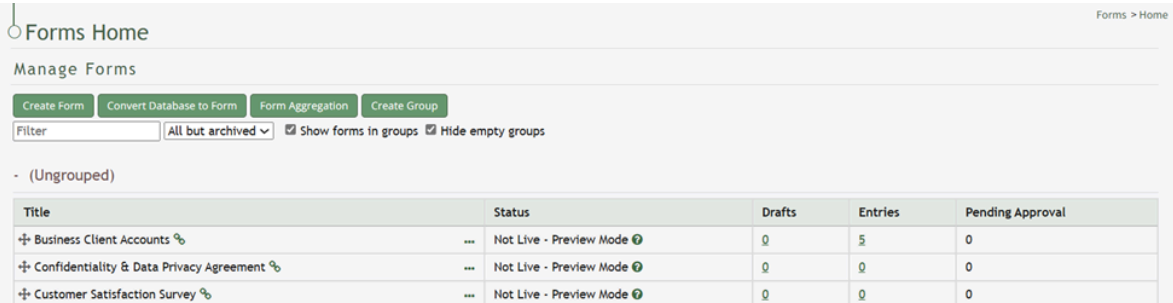
Importing fields from a PDF Field Import has multiple purposes. Not only will the form fields be generated through this process, the PDF will also be saved by the system, so that future form entries can be downloaded into this PDF, allowing for customizable outputs.

A form must have already been created with no fields added for this method to work. If a field has already been added to the form, you are no longer able to bulk import form field names from a PDF Field Import. You are now required to enter each field name individually.

Regardless, you can still upload a PDF Form that the system will use for future form entry downloads.

▼ How To: Create a Form

To create a new form, open the Home Page in the Forms Module from the Main Menu and select the Create Form button beneath the page header.



This will open the New Form Modal.

New Form

Title *

Notes

Tags

Select Some Options

► Basic Settings

► Advanced Settings

► Form Styling

Save

Cancel

Input the Form Title (a required field), form notes, and any open/permissive/restrictive tags to be associated with the form.

There are three additional sections to the New Form Modal that expand when clicked with additional options for customization. Modal images and explanations of each input are included below.

Basic Settings Section

▼ Basic Settings

Group

(No Groups Created) ▼

☐ Allow Public Entries

URL: <https://trainingground.kastrack.com/webforms/>

PDF options for form entries that were not submitted via a PDF

☐ Use KAStrack Generated PDF

When filling in an uploaded PDF for a form entry that was not submitted by PDF, you can use either the appropriate revision of the PDF (that was available at the time the form was submitted) or the latest revision of the PDF.

☒ Use the appropriate uploaded PDF revision

Allow integration with

Select Some Options

Note: The permissions in Advanced Settings only apply to users accessing this form via the forms module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this form, but it is integrated to assets, then someone who can perform a task on an asset with this form attached can add an entry, and view any entries associated with assets they can access.

New Form Modal: Basic Settings Section Explanation		
Modal Input	Explanation	
Group	A dropdown menu will list all existing form groups. The form will automatically be placed in the group selected.	
Allow Public Entries Checkbox	If the checkbox is selected, public entries (individuals not registered with KAStrack) will be allowed to submit form entries.	
URL Link	A URL Link is used to share the form publically. KAStrack will autofill the URL Link with the form title, but this can be customized if desired. You cannot use spaces or symbols in the URL link. They will be replaced with a hyphen if used.	
<i>The next two checkboxes are specific to the PDF options for form entries that are not submitted via a PDF. To understand which option is better for this specific form, be sure to read about the relationship between PDFs and Forms.</i>		
Use KAStrack Generated PDF	If you have a PDF entry on file but do not want the downloaded form entry to utilize the customized PDF form, select this checkbox and KAStrack will use the generic PDF format.	
Use the Appropriate Uploaded PDF Revision	If you have a PDF entry on file and want the downloaded form entry to utilize the customized PDF form, select this checkbox and KAStrack will use the most recent version of the PDF submitted.	
Allow Integration With	Allow integrations with is a dropdown menu that lists all modules you can use a form for. Selecting a module here will enable this form to be visible in the modules selected. Possible uses are listed below.	
	Module	Purpose
	Assets	Attach to Task
	Attendance	Integrate with the Attendance Log Module
	Database	Reference from Database
	Dispatch	Include in a Dispatch

Documents	Add to Photo
Forms	Reference from a Form
Grid	Integrate with the Grid Module
Kanban	Integrate with the Kanban Module
People	Use as activity for certification

Advanced Settings Section

▼ Advanced Settings

☐ Allow Payment

Default pattern for entries

☐ Allow the user to save as draft

☒ Allow Default Access

Additional Form Specific Permissions

Admins

Mitzi Orkus (morkus) X

Note: Users or Roles listed have admin level permissions for this form. This includes editing and deleting the form, managing the form fields and (unless prohibited) managing entries.

Manage Entry Permissions

Note: Users or Roles listed have manage level permissions for this form. This includes adding, editing and deleting entries.

Manage Pending Approval Entry Permissions

Note: Users or Roles listed can edit entries that are pending approval

View Entry Permissions

Note: Users or Roles listed have view level permissions for this form. This allows only viewing of entries.

Show in the Dashboard Forms Widget for

New Form Modal: Advanced Settings Section Explanation		
Modal Inputs		Explanation
Allow Payment Checkbox (Expands when selected)	Payment Profile	Select “All Enabled Configurations” from the dropdown menu for payments to be allowed.
	Payment Description	This description is what will show on a payment receipt.
Default Pattern for Entries		This textbox uses mail merge fields.
Allow the User to Save AS Draft Checkbox (Expands when selected)	Allow Logged Out User to Save as a Draft	Selecting this checkbox will allow logged out users and public entries to save their response as a draft and come back to the form (on the same device).
	Validate Fields when Saving as Draft	Fields with validation don’t validate on a draft, so inputting fields here tells the system to validate fields when the draft is saved.

Allow Default Access Checkbox	Save Draft Button Text	The form creator can customize the text on the Save button.
	Auto Save	When auto-save is enabled, any edits made to a field will automatically be saved. When auto-save is disabled, the information will only be saved when the save draft button is clicked.
	When Selected	The form will follow module level permissions in regards to what access an individual will have.
	<i>If allow default access is not selected, the additional form specific permissions are now required. The system will ignore module level distinctions for this form and will be guided by the form specific permissions listed below.</i>	
	Admins	A checkbox allows for admins to be prohibited from viewing entries. Users or roles listed here will have admin level permissions for this form. This includes editing and deleting the form, managing the form fields and (unless prohibited) managing entries.
	Manage Entry Permissions	Users or roles listed here have manage level permissions for this form. This includes adding, editing and deleting entries.
	Manage Pending Approval Entry Permissions	Users or roles listed here can edit entries that are pending approval.
Show in the Dashboard Forms Widget		Users and certification roles selected here will show this form in the Dashboard Forms Module Summary Widget.

Form Styling Section

▼ Form Styling

Save Button Text *

Save

Cancel Button Text *

Cancel

Submission Message *

Your form has been submitted. Submission ID: #SubmissionID#

☒ Show green check mark with submission message

☒ Show the form title

Apply whole form SCSS to *

Logged Out Only ▼

When logged in, the CSS will be contained within the form wrapper div, however when logged out, the whole page can be styled.

SCSS for whole form

New Form Modal: Form Styling Section		
Modal Inputs	Explanation	
Save Button Text	Change the verbiage on the save button by inputting other text here.	
Cancel Button Text	Change the verbiage on the cancel button by inputting other text here.	
Submission Message	Change the verbiage on the form submission message by inputting other text here.	
Show Green Checkmark Checkbox	Selecting the show green checkmark with submission message checkbox will show a green checkmark to the left of the submission message when a form is submitted.	
Show the Form Title Checkbox	Select the Show the Form Title Checkbox will show the form title for a logged-out entry. This does not impact a system, modal based entry.	
Apply Whole Form SCSS to	Logged Out Only	Select "Logged Out Only" if the styling doesn't correspond with a popup modal or the regular form page. This would result is SCSS styling only applies to public entries.
	Logged In Only	Select "Logged In Only" if you only want to apply the SCSS formatting to the logged in, internal users.
	Always	Selecting "Always" applies the SCSS formatting that has been established in both internal and external forms.
SCSS for Whole Form	This is the textbox where scripting language should be input, that allows for greater customization than what is generally available.	

Select the Save button on the New Form Modal after customizing your form and the system will direct you to the form's Fields Tab where you can begin to input Form fields.



▼ How To: Import Fields from a PDF Field Import

{{@400}}

▼ How To: Import Form Fields from a CSV File

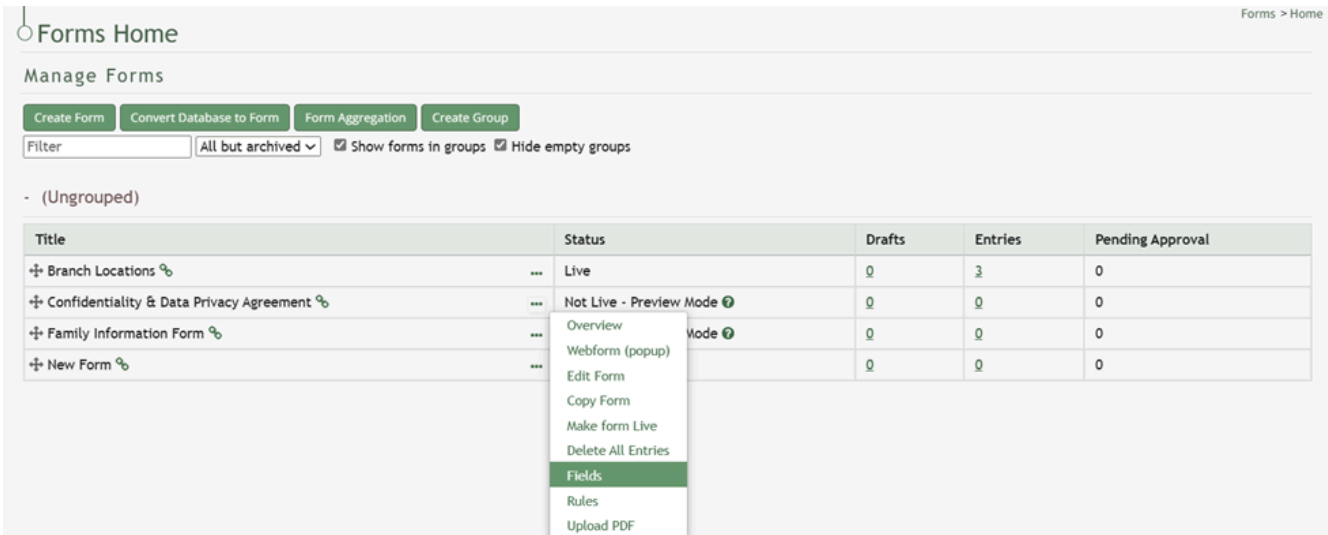
{{@402}}

▼ How To: Upload a PDF Form

{{@408}}

▼ How To: Add a Field to a Form

To add a field to a form, go to the Home Page of the Forms Module. . Click the three-dot icon to the right of the form title that you want to add a field to opening the Form context menu. Select “Fields”.



This opens the Fields Tab for the specific form of interest.

There are two ways to add an individual field to the Fields Table from here. Click the “New Field” button opening the New Form Field Modal.

New Form Field

Field Name (a-z, A-Z, 0-9, _ - and space only) *

Displayed Label

Field Type

Text

☒ Include on Form

☐ Start Hidden

☒ Show in View/Manage Entries

☐ Force capitalization

☐ Treat as Link

Default

Placeholder Text (Max 25 characters)

Context Sensitive Help

Validation

Optional : Optional

Validation Help

CSS Classes

Save

Cancel

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Form Field Modal will vary based on the Field Type.

Possible field types in the Forms Module include Form Fields, Formatting Fields, Utility Fields, Account Fields, and Reference a Database Entry. For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Forms Module in the User Manual.

A form field can only have on field type. If you need to utilize another (e.g., formatting purposes), you can set the displayed label to be the same but the field label must be unique.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Fields Table on the Fields Tab.

Fields for form 'Branch Locations'

Overview

Fields

Rules

Warning: This form is in Live status.

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Webform (popup)

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name	Text		Yes
+ Last Name	Text		Yes
+ Favorite Color	Radios		Yes
+ Age	Text		Yes

Fields can also be imported in bulk into a Form from a CSV file or PDF Field Import.

▼ How To: Import Form Fields from a CSV File

{{@402}}

▼ How To: Import Fields from a PDF Field Import

{{@400}}

▼ How To: Upload a PDF Form

Uploading a PDF allows an individual to create a customized output for form entries. In order to do so, the PDF must be created on Adobe Acrobat Pro (or comparable software) and have made use of form fields.

A PDF can be created and uploaded after a form is in use, however no additional fields can be created at this time.

To upload a PDF form to be used for form entry outputs, go to the Home Page of the Forms Module. Click the three-dot icon to the right of the form title opening the context menu and select “Upload PDF”.

Forms Home

Forms > Home

Manage Forms

Create Form

Convert Database to Form

Form Aggregation

Create Group

Filter

All but archived

☒ Show forms in groups

☒ Hide empty groups

- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Business Client Accounts	Not Live - Preview Mode	0	5	0
Confidentiality & Data Privacy Agreement	Overview	0	0	0
Customer Satisfaction Survey	Webform (popup)	0	0	0
Employee Satisfaction Survey	Edit Form	0	0	0
Family Information Form	Copy Form	0	0	0
New Client Information	Make form Live	0	0	0
	Delete All Entries	0	0	0
	Fields			
	Rules			
	Upload PDF			

This will open the Upload PDF Form Modal.

Upload PDF Form for Business Client Accounts

Note: Max file size is 524MB

Choose Files

No file chosen

Title *

Revision

1

Revision Date

Nov 02 2025

☐ Document is public

☐ Document is a 360° photo

Document Owner(s) *

Mitzi Orkus (user morkus) X

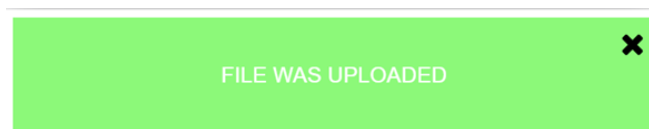
Cancel

Select “Choose File” to retrieve the PDF from your personal device.

Input a title for the PDF or select the clickable “Use Filename” link to have the system use the filename as the title. The revision date will automatically show the current day, but can be altered. Select the appropriate checkbox if the document is to be public, or if it is a 360 degree photo.

You can select individuals or certification roles as the document owner(s).

Select “Save” and a confirmation modal will appear stating, “File was uploaded.”



To import field names from a PDF file, go to the Home Page of the Forms Module.

Select the three-dot icon to the right of the Form Title opening the Form’s context menu. Select “Form”.

Forms Home

Manage Forms

Create Form Convert Database to Form Form Aggregation Create Group

Filter All but archived Show forms in groups Hide empty groups

- (Ungrouped)

Title	Status	Drafts	Entries	Pending Approval
Branch Locations	Live	0	3	0
Confidentiality & Data Privacy Agreement	Not Live - Preview Mode	0	0	0
Family Information Form	Overview	0	0	0
New Form	Webform (popup)	0	0	0

- Edit Form
- Copy Form
- Make form Live
- Delete All Entries
- Fields
- Rules
- Upload PDF

This opens the Fields Tab for a specific form. Select the “PDF Field Import” button.

Fields for form 'New Client Information'

Overview Fields Rules

New Field Webform (popup) PDF Field Import

Field Name Field Type Validation Include on Form

This opens the PDF Field Import Modal.

PDF Field Import

Using Adobe Acrobat Pro, Use the "Prepare Form" Tool.

After you have successfully added the fields you wish to use for your form, Add a Button on your document. Within the properties of the button, Click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the following URL for the link:
<https://trainingground.kastrack.com/database/pdf-entry/9EDE0BACF7F141B68FABD2E077515E59>

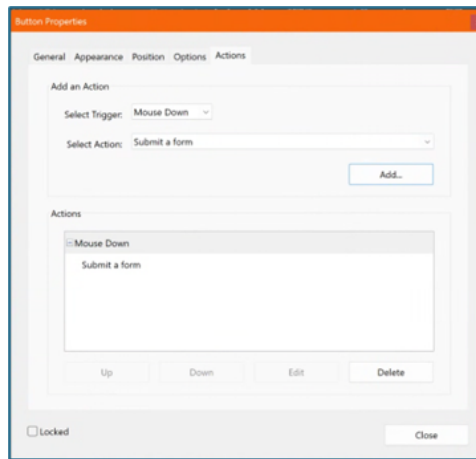
Copy Link to Clipboard

Confirm that the Export Format is "PDF The complete document."

Open the PDF and submit the form to generate the fields here. You do not need to fill in any of the fields, and you must not sign it!

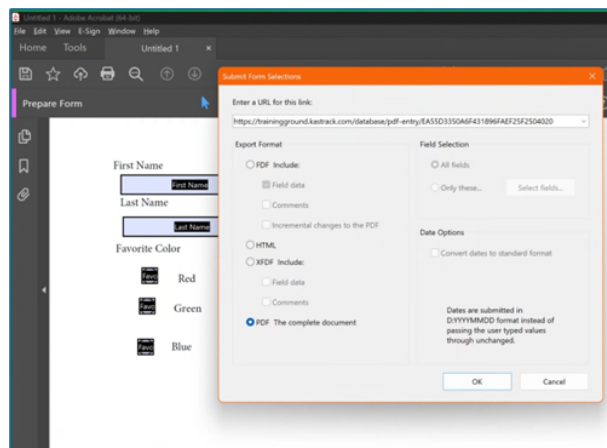
Close

To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

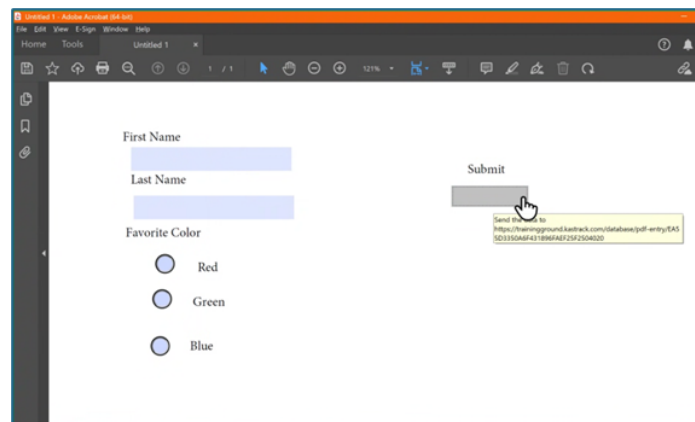


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAtrack.

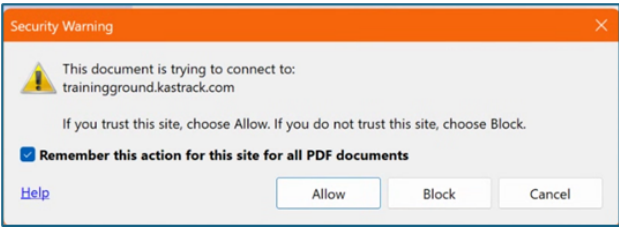


Confirm that the Export Format is “PDF The complete document”.

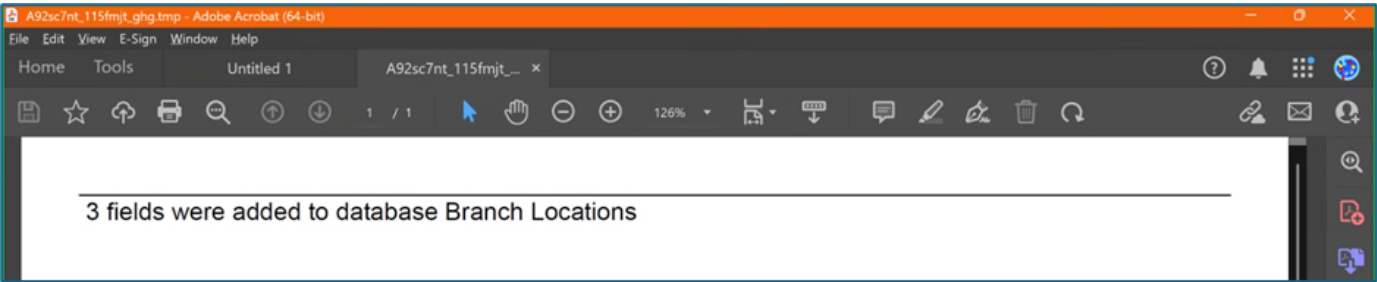


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select “Allow” and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Stock Database Requirements	
Required Fields*	Explanation
Location	Inventory location can be defined through a single database, or multiple databases if desired.
Inventory Item Title	This field will be used to identify the stock inventory item. Some examples of possible field names include title, item, part, etc. The Title will be comprised out of fields in the stock database.
Quantity	This field will state the number of stock items currently in the inventory.
Part Type	A inventory item must be specified as generic or unique if the inventory is integrated with a unique items database. Part Type is only a required field if you have both a stock and a unique database.
* The actual field name for required fields can be customized to your preference.	

All fields created in the database will show in the Fields Table.

Field Name	Field Type	Validation	Include on Form
+ Locations ...	Database : Main Branch Admin Closet		Yes
+ Items ...	Text		Yes
+ Quantity ...	Text		Yes
+ Part Type ...	Dropdown		Yes
+ Category ...	Dropdown		Yes

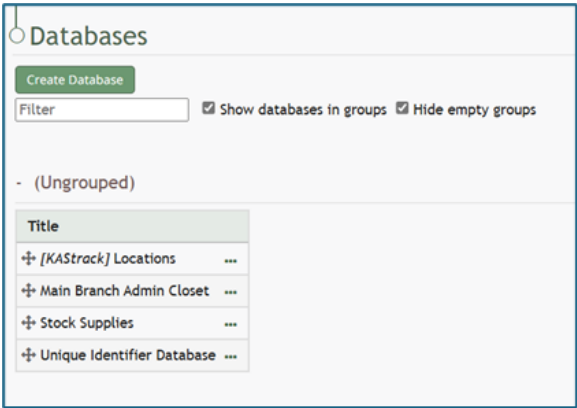
After your fields have been generated, stock inventory items can now be entered into the database in bulk via a CSV file import or entries can be added individually.

▼ **How To: Import Database Entries from a CSV**

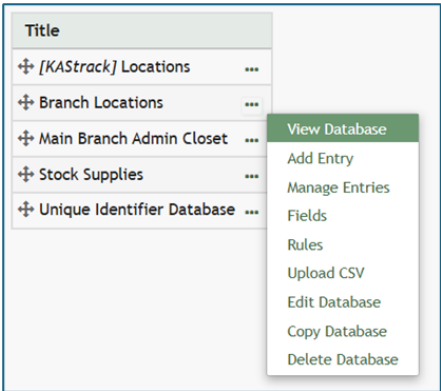
To import database entries from a CSV, database fields must already have been created.

▼ **How To: Add a Database Field**

To create a database field, go to the Home Page of the Database Module.

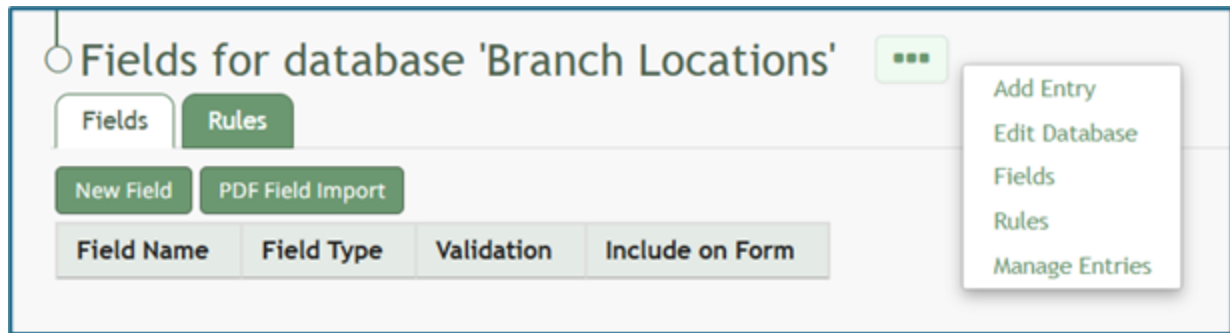


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, . and space only) *

Displayed Label

Field Type

Section Start ▼

- Form Fields**
- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password
- Formatting**
- Section Start
- Section End
- Tabs Start
- Tabs End
- Utility**
- Information
- Calculated Field
- Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

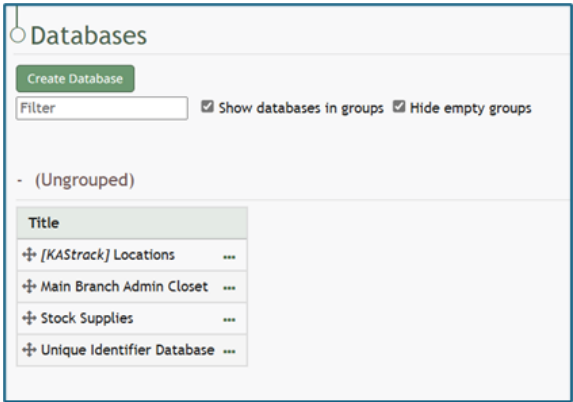
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

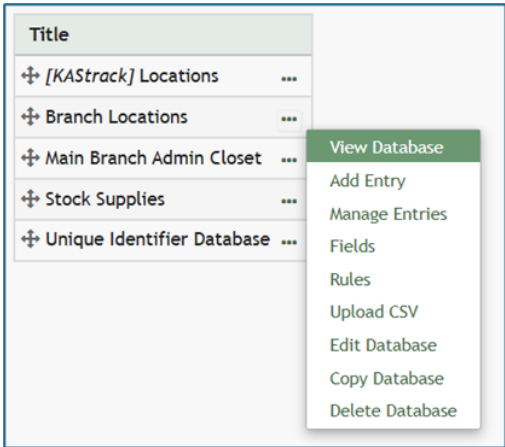
▼ How To: Add a Database Field

 $\{\{ @321 \}\}$

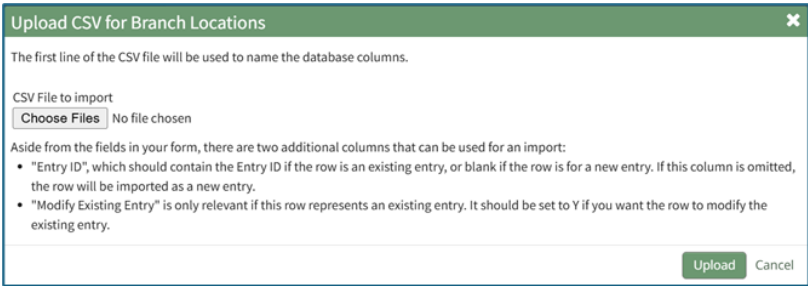
To import database field names from a CSV file, go to the Home Page of the Database Module.



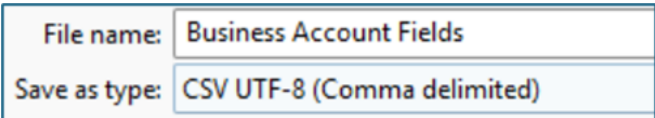
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.



After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name: Business Account Fields

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

"Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.

"Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Database > Import CSV To Business C

Upload CSV for Business Client Accounts

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name	Name: City	Name: State	Name: Employee Count	Name: Annual Revnue
Type: Text	Type: Text	Type: Text	Type: Text	Type: Text
Validation:	Validation:	Validation:	Validation:	Validation:

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

0 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

Fields for database 'Business Client Accounts' ⋮

Fields Rules

New Field Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name ⋮	Text		Yes
+ City ⋮	Text		Yes
+ State ⋮	Text		Yes
+ Employee Count ⋮	Text		Yes
+ Annual Revnue ⋮	Text		Yes
+ Account Manager ⋮	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

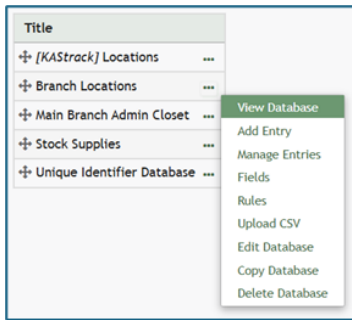
Filter

☒ Show databases in groups ☒ Hide empty groups

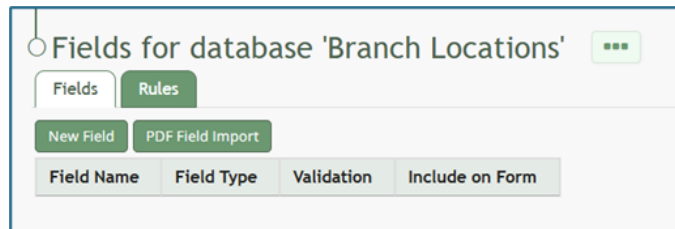
- (Ungrouped)

Title
+ [KAStrack] Locations ⋮
+ Main Branch Admin Closet ⋮
+ Stock Supplies ⋮
+ Unique Identifier Database ⋮

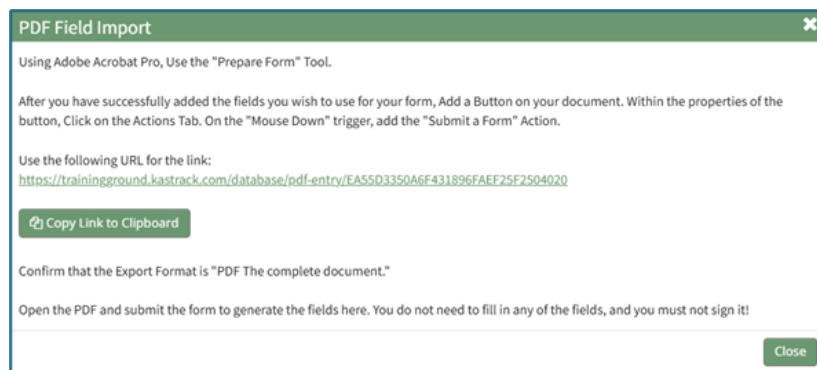
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



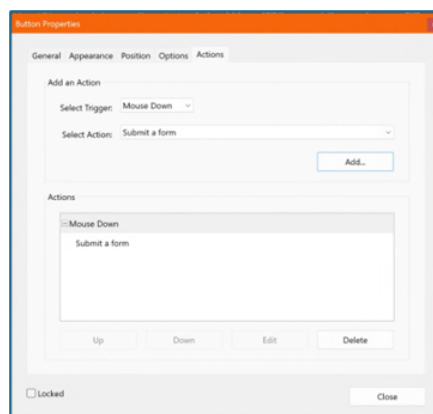
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

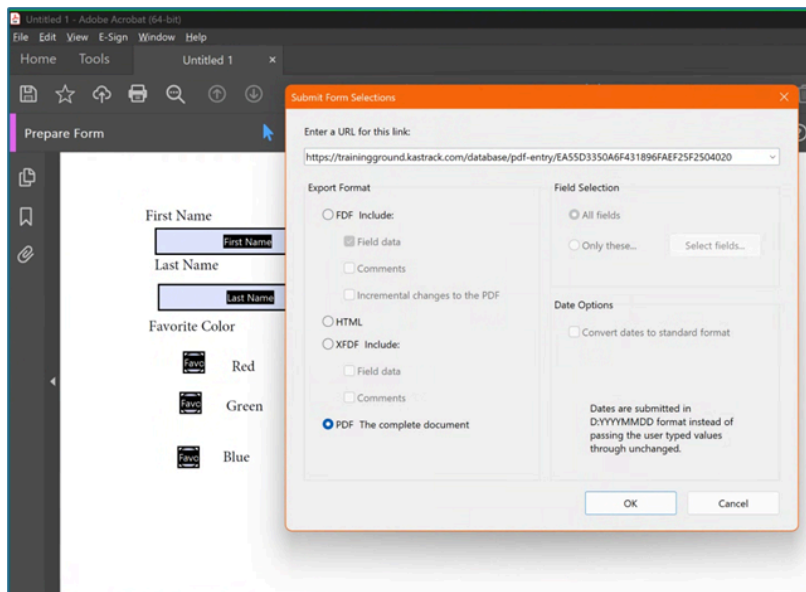


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

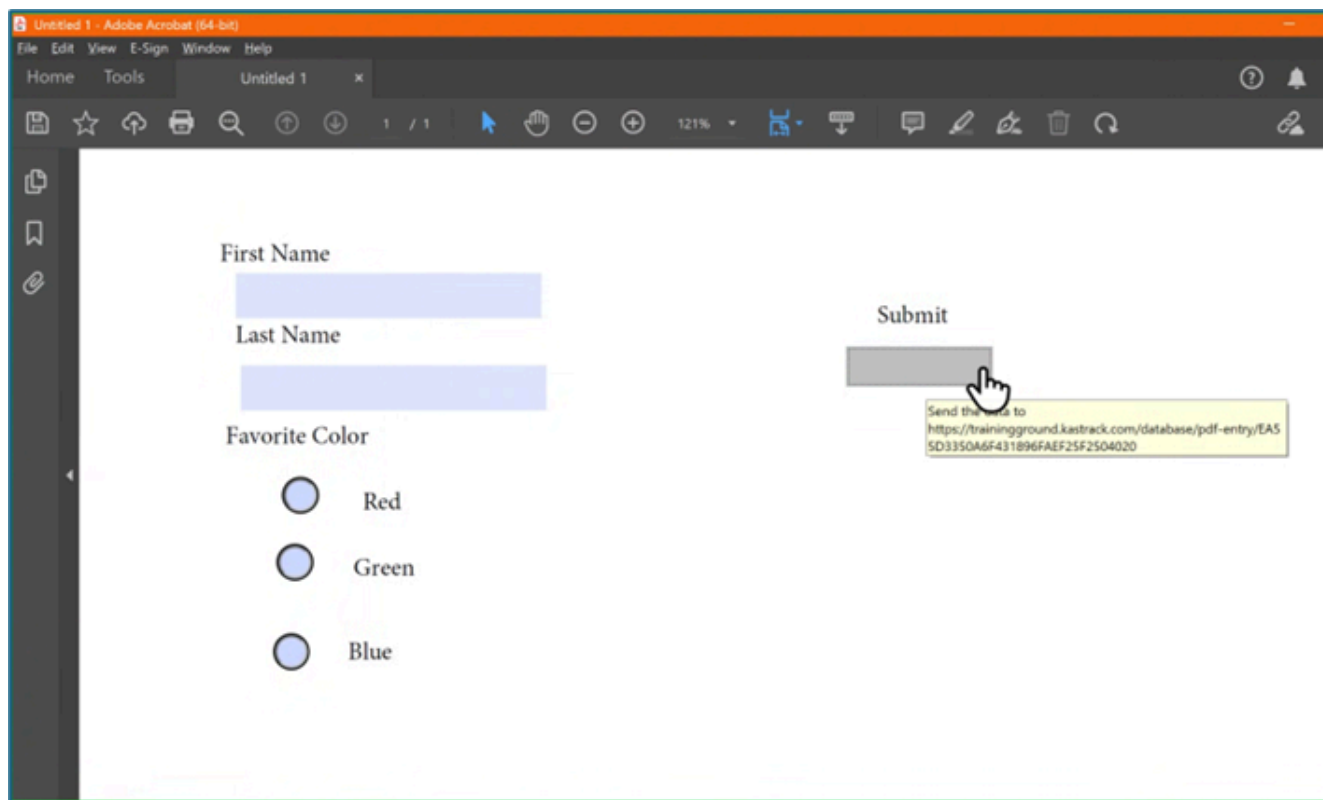


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KASTrack.

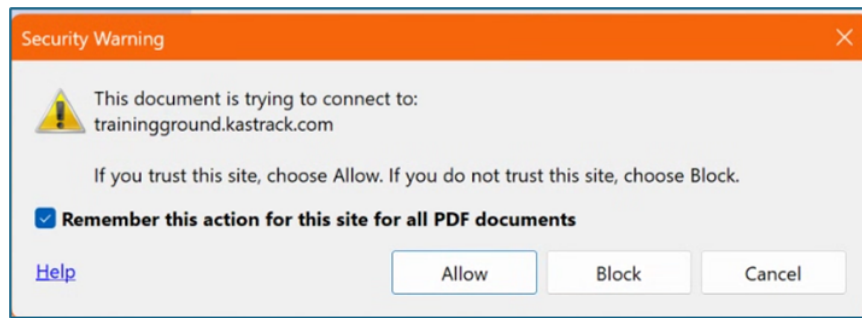


Confirm that the Export Format is “PDF The complete document”.

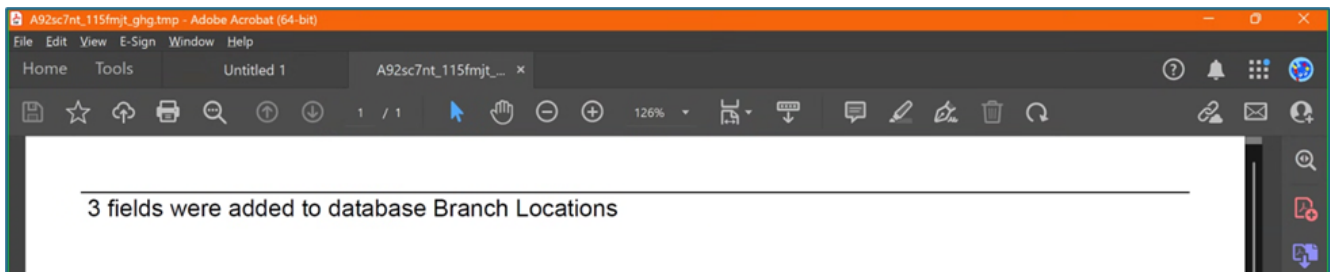


Open the PDF and submit the form to generate the fields here.

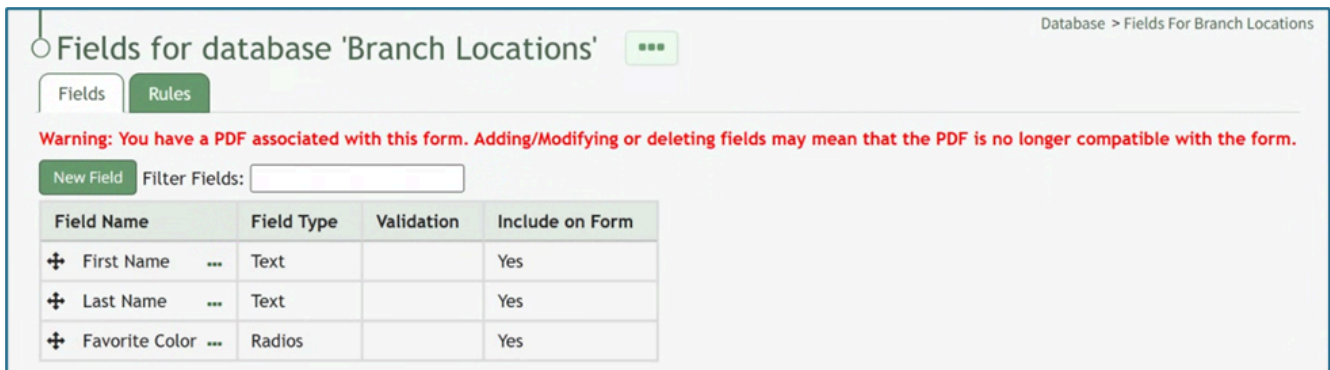
You do not need to fill in any of the fields, and you must not sign it.



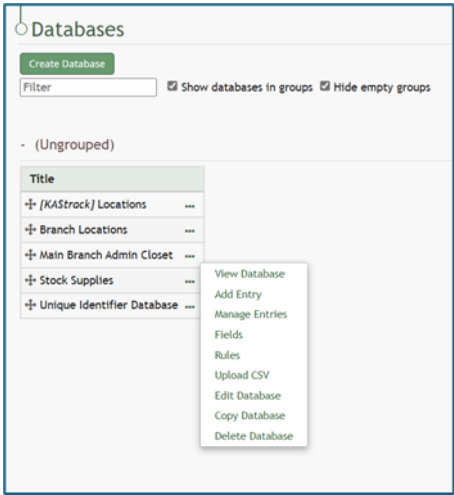
Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

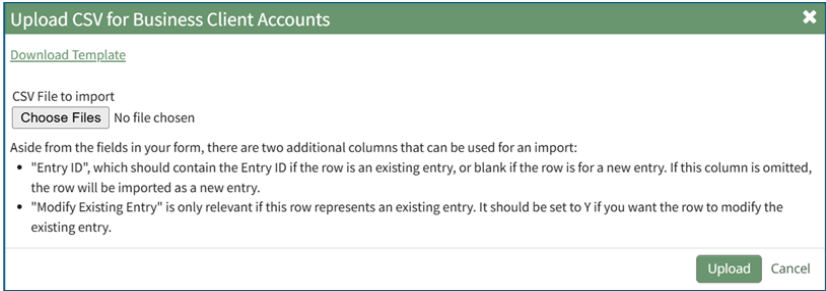


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ **Notes Regarding the Downloadable Template for Uploading CSV Files**

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ...

Add EntryImport EntriesExport Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Add an Individual Database Entry

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.

Title

+ [KAStrack] Locations

+ Branch Locations

+ Main Branch Admin Closet

+ Stock Supplies

+ Unique Identifier Database

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

Edit Database

Copy Database

Delete Database

Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations

Shelf1 - Bin1

Items

Quantity

Part Type

Please Choose...

Category

Client

Save

Cancel

New Database Entry

Shelf

Please Choose

Bin

Please Choose

Save

Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save

Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

Now that your stock database has been created and filled with inventory item entries, it is ready to be integrated into an inventory.

Unique Items Database

The unique items database is generated if you have inventory items that have a unique identifier, such a serial number. The fields included in the Unique Items Database will show on the modal for each unique item in the inventory. Inventories are not required to have a unique items database to function properly.



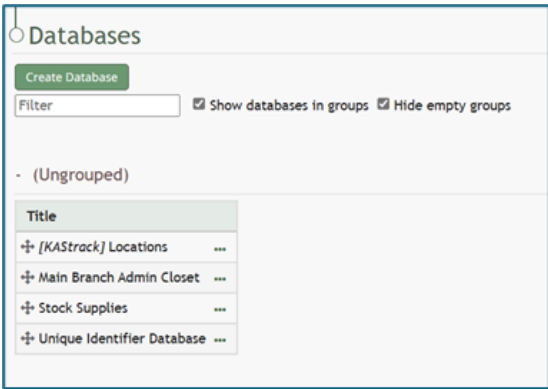
Your unique items database can include a variety of fields, but for the Inventory Module to function properly, it must have field(s) that identify the inventory item (title) and field(s) that are used to identify the unique item.

▼ How To: Create a Unique Items Database

To create a unique items database, go to the Home Page of the Database Module and create a new database. Click the “Create Database” button and input a database title and description. Select the appropriate database group from the dropdown menu. You can use default access parameters or customize database specific parameters.

▼ How To: Create a Database

To create a new database, go to the Home Page of the Database Module.



Click the “Create Database” button, opening the New Database Modal.

New Database

Title *

Group

(No Groups Created)

Description

Tags

Select Some Options

☒ Allow Default Access

Input a Title for the new database. Select any groups the database should be associated with. Provide a description of the database and its purpose in the textbox provide. Select any tags desired.

Select the “Allow Default Access” checkbox to indicate that the database should follow the defaults established by module and access levels. If this checkbox is not selected, you will be required to establish user specific access based on individual or certification roles.

Additional Database Specific Permissions

Admins

Select Some Options

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Select Some Options

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save

Cancel

The following database specific permissions are selected via drop down menu lists that include all individuals and certification roles that can be assigned permission.

Admins allows users or role to have admin module level permissions for this particular database. A list of all admin module level permissions is shown in the table below.

Database Admin Module Level Permissions
Manage roles (add/view/edit/delete, assign hidden roles, role permissions)
Database (view/edit/delete/list/add, upload csv)
Database Fields (edit/delete/view/list)

Database Entry (view/edit/delete/list/add)
Can delete entries from other modules
Database draft entries (abandon drafts from guests/users, view drafts from users/guests, list drafts from user/guests, reassign)
Database Group (list/add/edit/delete/view)

Manage Entry Permissions gives the indicated users permission to view, add, edit, and delete database entries.

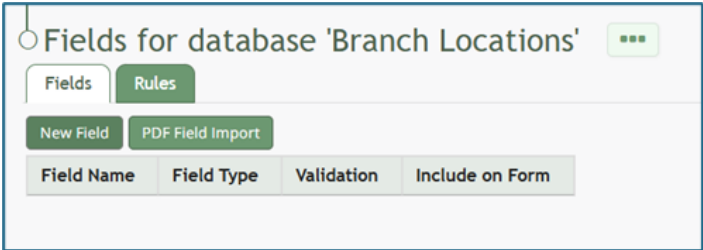
View Entry Permissions gives the indicated users permission to view database entries.

Allow Integration With denotes which other modules can link with and integrate with this database or forms for reference.

The Database Module can be integrated with the following modules:

- Forms
- Database
- Inventory
- Grid

Click “Cancel” and return to the Database Module Home Page without any changes being made. Select “Save” to create the new database and you will be directed to the Fields Table for your newly copied database.



Once a database has been created, you can enter database fields into it.

▼ How To: Import Fields from a CSV File Into a Database

To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

{{@321}}

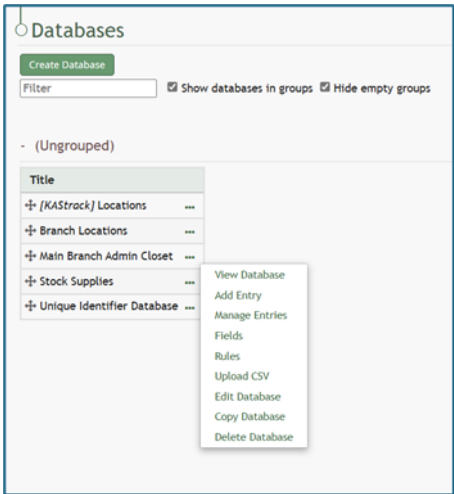
▼ How To: Import Fields from a CSV File Into a Database

{{@339}}

▼ How To: Import Fields from a PDF Field Import

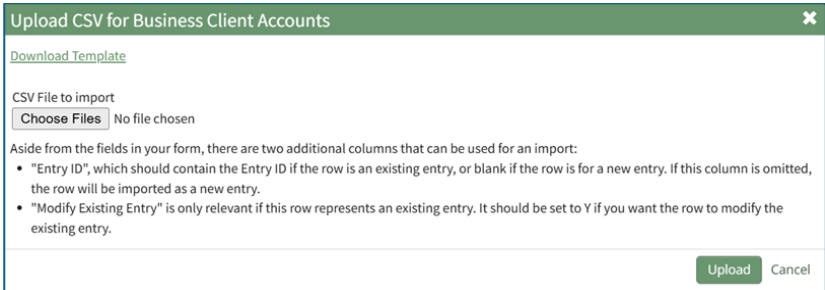
{{@340}}

To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Hatallie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add EntryImport EntriesExport Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revnue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Enironmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Import Fields from a PDF Field Import

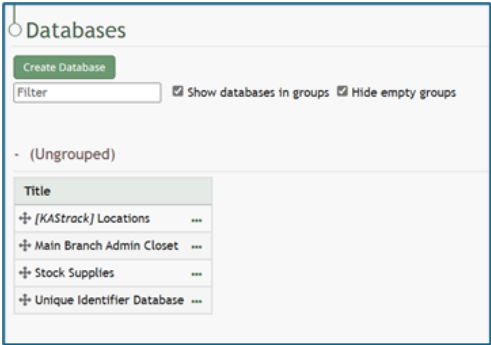
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

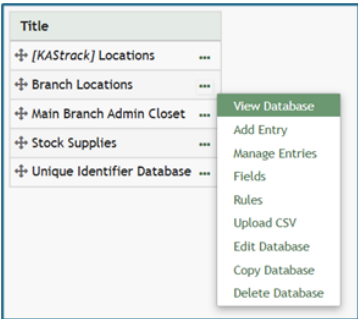
▼ How To: Add a Database Field

{{@321}}

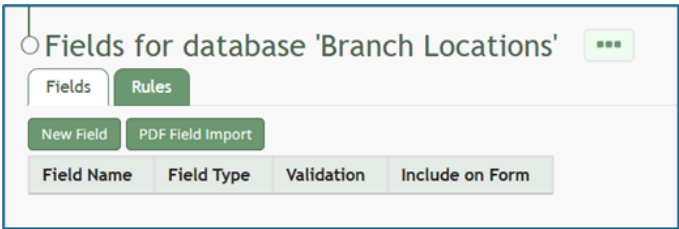
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

PDF Field Import

Using Adobe Acrobat Pro, Use the "Prepare Form" Tool.

After you have successfully added the fields you wish to use for your form, Add a Button on your document. Within the properties of the button, Click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the following URL for the link:
<https://trainingground.kastrack.com/database/pdf-entry/EAS5D3350A6F431896FAEF25F2504020>

Copy Link to Clipboard

Confirm that the Export Format is "PDF The complete document."

Open the PDF and submit the form to generate the fields here. You do not need to fill in any of the fields, and you must not sign it!

Close

To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

Button Properties

General Appearance Position Options Actions

Add an Action

Select Trigger: Mouse Down

Select Action: Submit a form

Add...

Actions

Mouse Down

Submit a form

Up Down Edit Delete

Locked

Close

Within the button properties, click on the Actions Tab. On the "Mouse Down" trigger, add the "Submit a Form" Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

Untitled 1 - Adobe Acrobat (64-bit)

File Edit View E-Sign Window Help

Home Tools

Untitled 1 x

Prepare Form

First Name

Last Name

Favorite Color

Red

Green

Blue

Submit Form Selections

Enter a URL for this link:
<https://trainingground.kastrack.com/database/pdf-entry/EAS5D3350A6F431896FAEF25F2504020>

Export Format

☐ PDF Include:
☐ Field data
☐ Comments
☐ Incremental changes to the PDF

☐ HTML

☐ XFDF Include:
☐ Field data
☐ Comments

☒ PDF The complete document

Field Selection

☐ All fields

☐ Only these...
Select fields...

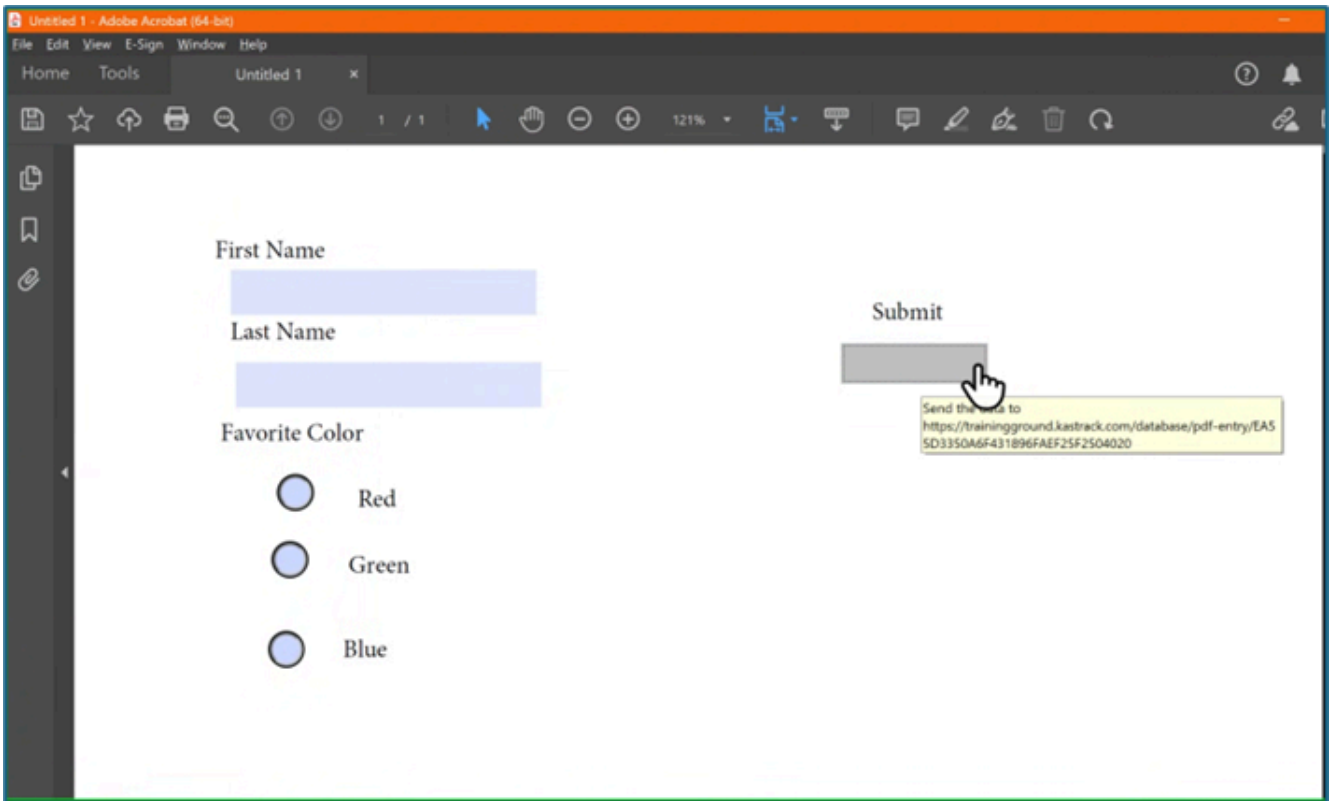
Date Options

☐ Convert dates to standard format

Dates are submitted in D:YYYYMMDD format instead of passing the user typed values through unchanged.

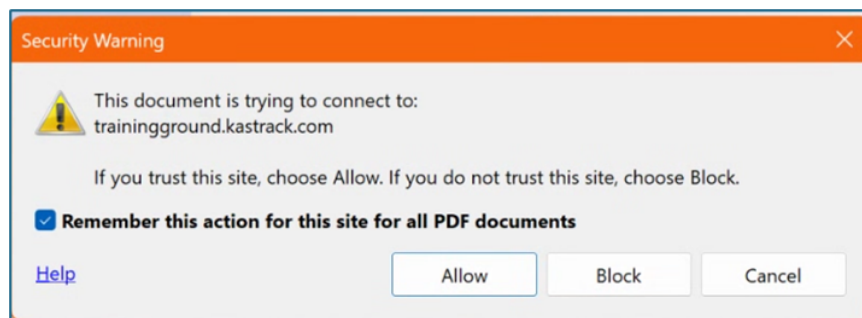
OK Cancel

Confirm that the Export Format is "PDF The complete document".

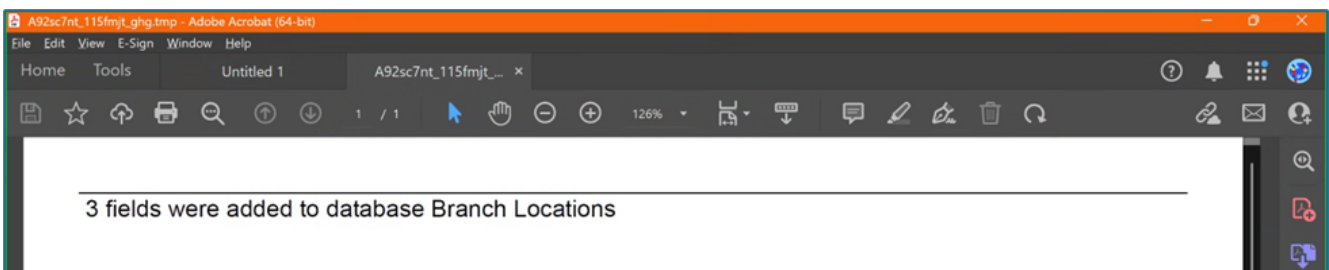


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

Database > Fields For Branch Locations

FieldsRules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

Filter

Show databases in groupsHide empty groups

(Ungrouped)

Title

+ [KAStrack] Locations ...

+ Main Branch Admin Closet ...

+ Stock Supplies ...

+ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.

Title

+ [KAStrack] Locations ...

+ Branch Locations ...

+ Main Branch Admin Closet ...

+ Stock Supplies ...

+ Unique Identifier Database ...

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

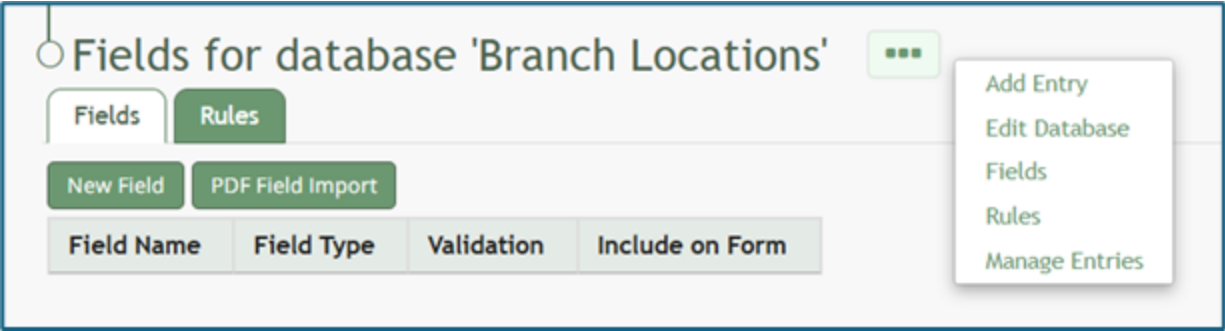
Edit Database

Copy Database

Delete Database

Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

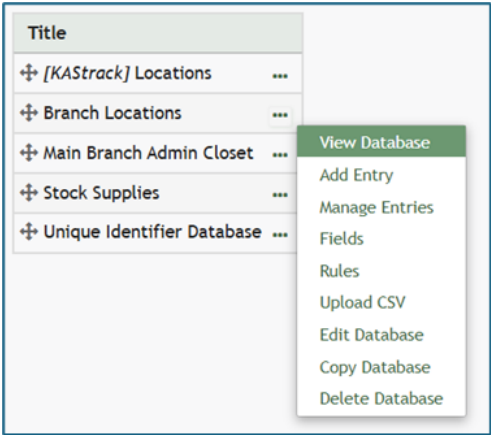
{{@340}}

Once you have entered database fields, you can add database entries into it.

▼ How To: Add an Individual Database Entry

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.



Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations

Shelf1 - Bin1

Items

Quantity

Part Type

Please Choose...

Category

Client

Save

Cancel

New Database Entry

Shelf

Please Choose

Bin

Please Choose

Save

Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save

Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

▼ How To: Import Database Entries from a CSV

To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

{{@321}}

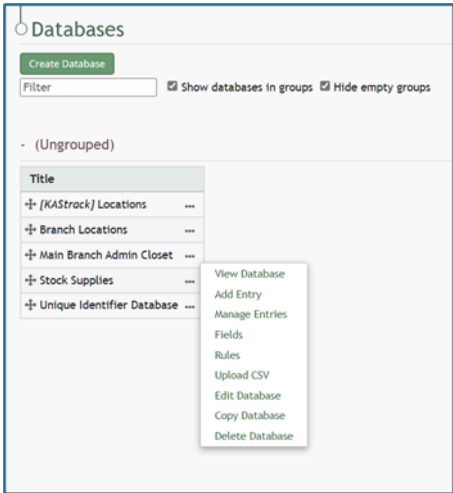
▼ How To: Import Fields from a CSV File Into a Database

{{@339}}

▼ How To: Import Fields from a PDF Field Import

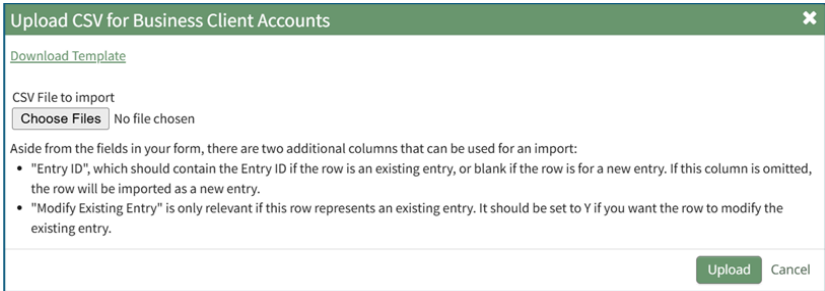
{{@340}}

To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ Notes Regarding the Downloadable Template for Uploading CSV Files

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:	Business Client Account Database Entries
Save as type:	CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name: Business Client Account Database Entries	All files	
Upload from mobile	Open	Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported
0 records updated
0 records failed to import

[Home](#) • [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ***

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

Edit Database

Title

Serialized Inventory

Group

(No Groups Created)

Description

Unique items database needed for inventory creation

Tags

Select Some Options

Allow Default Access

Additional Database Specific Permissions

Admins

Select Some Options

Note: Users or Roles listed have admin level permissions for this database. This includes editing and deleting the database, managing the database fields and (unless prohibited) managing entries.

Manage Entry Permissions

Select Some Options

Note: Users or Roles listed have manage level permissions for this database. This includes adding, editing and deleting entries.

View Entry Permissions

Select Some Options

Note: Users or Roles listed have view level permissions for this database. This allows only viewing of entries.

Allow integration with

Database : Reference from a Database Inventory : Integrate with the Inventory Module

Note: The above permissions only apply to users accessing this database via the database module. When integrated with other modules, users automatically have access to view and add entries for relevant items in the module. Example: If no-one is allowed to view this database, but it is integrated to forms, then someone who can fill out the form can see the entries in this database.

Save

Cancel

Select “Save” and the system will direct you to the Fields Page, where new fields can be added. Your unique items database can include a variety of fields, but for the Inventory Module to function properly, it must have field(s) that identify the inventory item (title) and field(s) that are used to identify the unique item.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

Filter

Show databases in groups

Hide empty groups

(Ungrouped)

Title

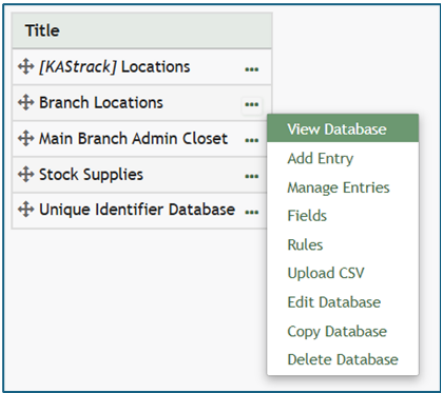
[KAStrack] Locations

Main Branch Admin Closet

Stock Supplies

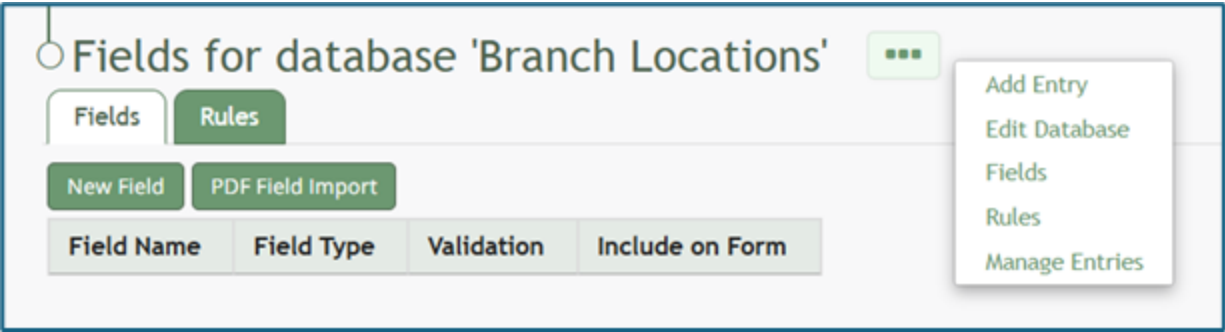
Unique Identifier Database

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, and space only) *

Displayed Label

Field Type

Section Start ▼

Form Fields

- Text
- Text Box
- HTML Text Box
- Checkbox
- Dropdown
- Radios
- Date
- Date/Time
- File Upload
- Image
- Password

Formatting

Section Start

Section End

Tabs Start

Tabs End

Utility

Information

Calculated Field

Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

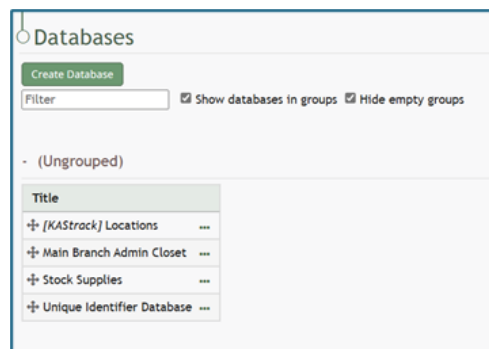
This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

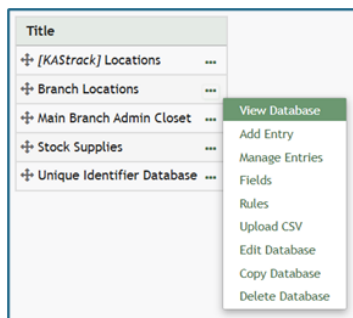
▼ How To: Add a Database Field

 $\{\{ @321 \}\}$

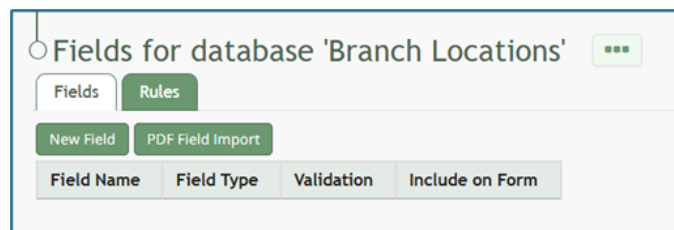
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



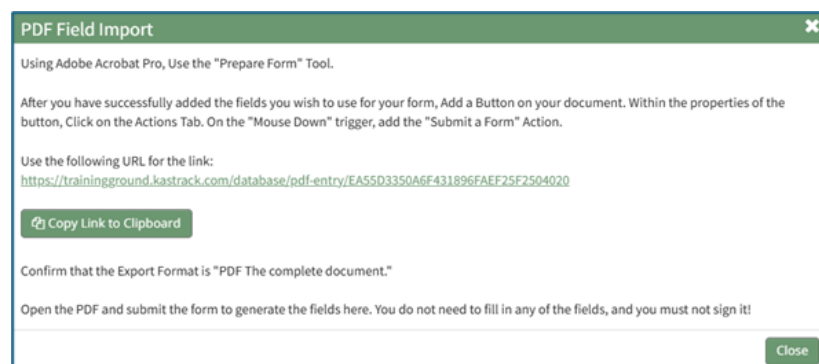
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



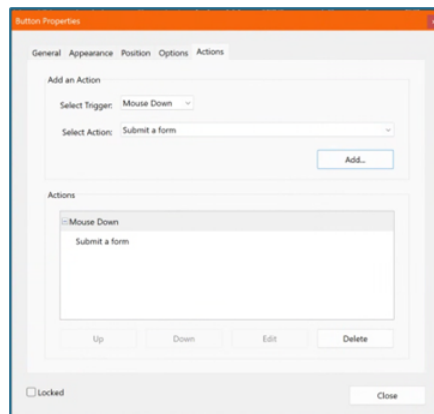
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

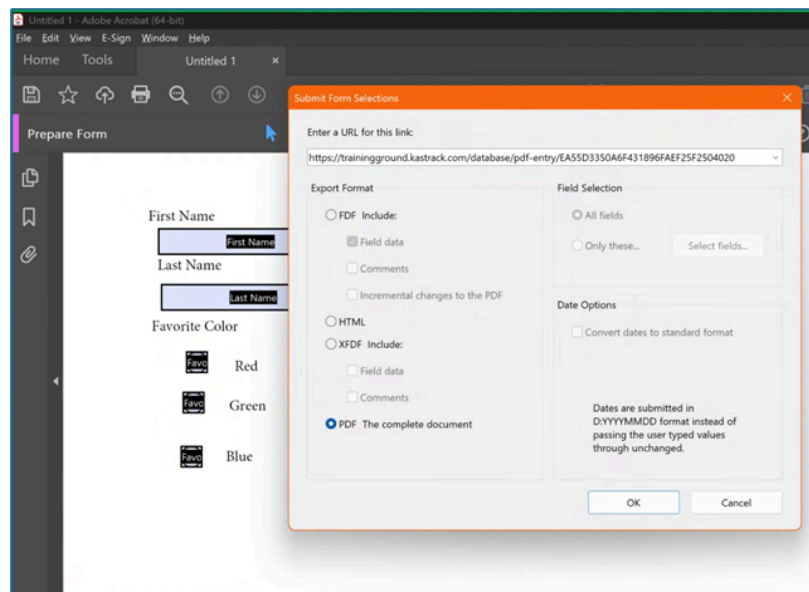


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

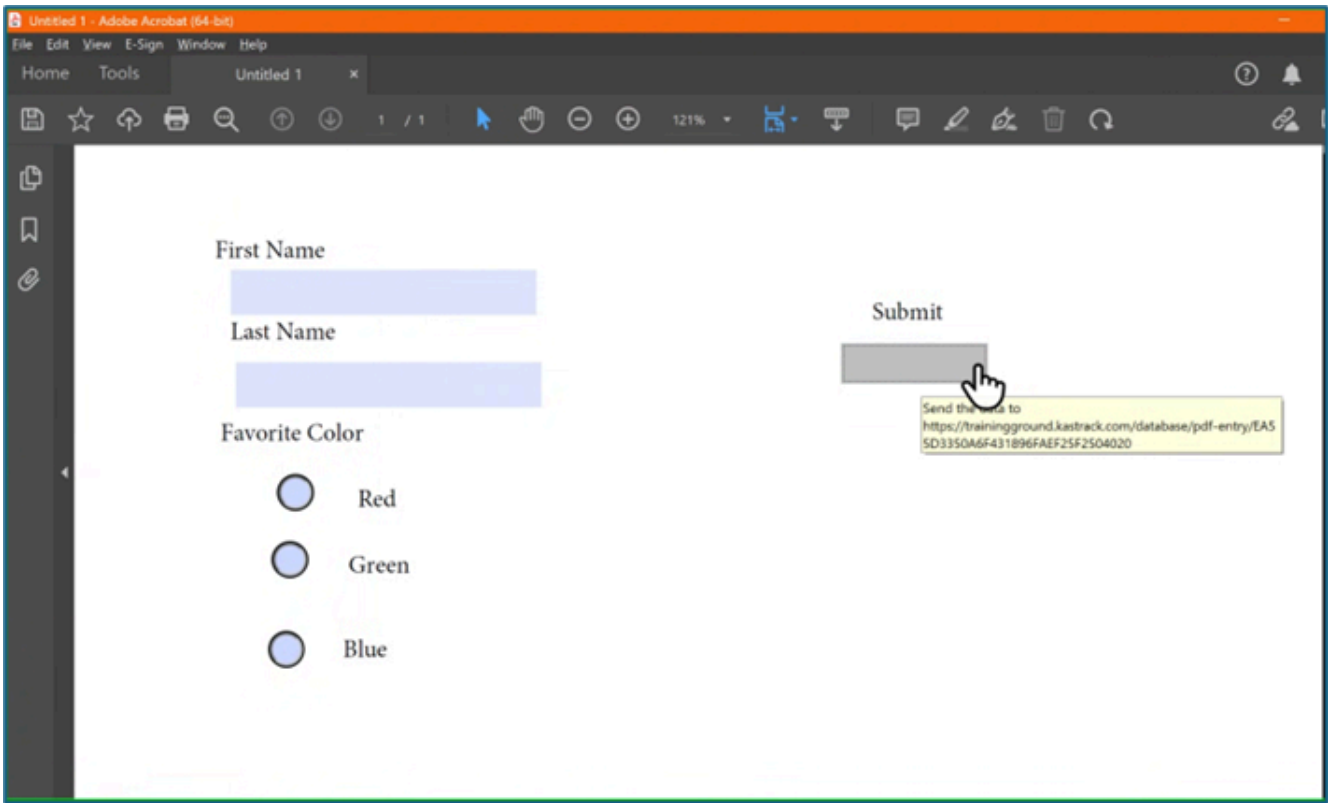


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

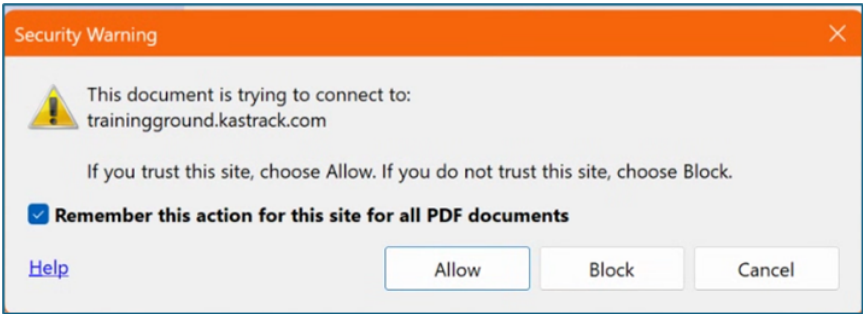


Confirm that the Export Format is “PDF The complete document”.

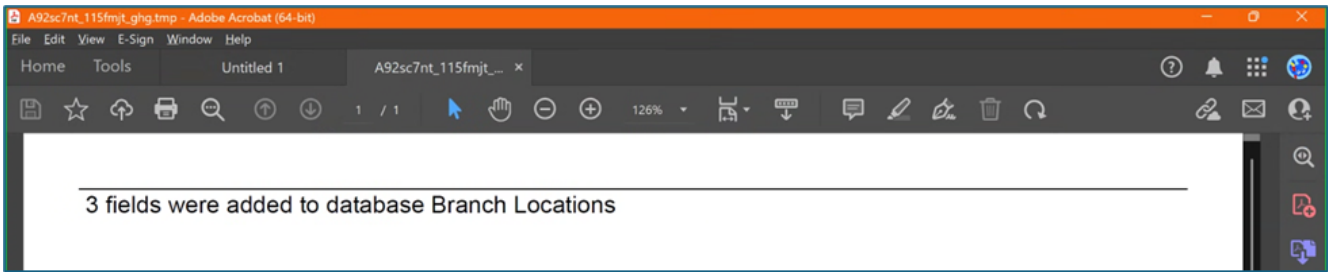


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

Fields for database 'Branch Locations'

...

Database > Fields For Branch Locations

Fields

Rules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ...	Text		Yes
+ Last Name ...	Text		Yes
+ Favorite Color ...	Radios		Yes

▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

Databases

Create Database

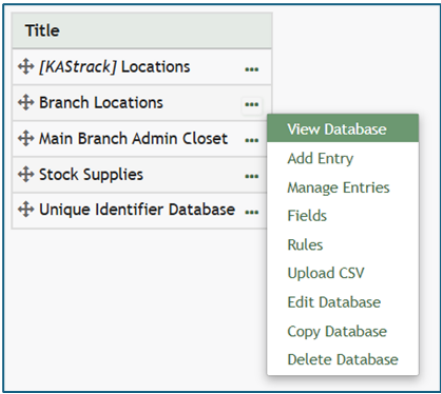
Filter

☒ Show databases in groups ☒ Hide empty groups

- (Ungrouped)

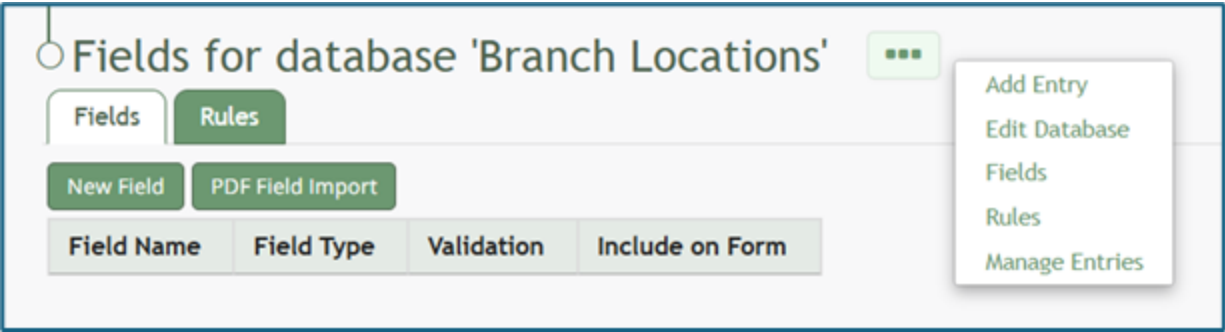
Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, . and space only) *

Displayed Label

Field Type

Section Start ▼

- Form Fields**
 - Text**
 - Text Box
 - HTML Text Box
 - Checkbox
 - Dropdown
 - Radios
 - Date
 - Date/Time
 - File Upload
 - Image
 - Password
- Formatting**
 - Section Start
 - Section End
 - Tabs Start
 - Tabs End
- Utility**
 - Information
 - Calculated Field
 - Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

To import database field names from a CSV file, go to the Home Page of the Database Module.

Databases

Create Database

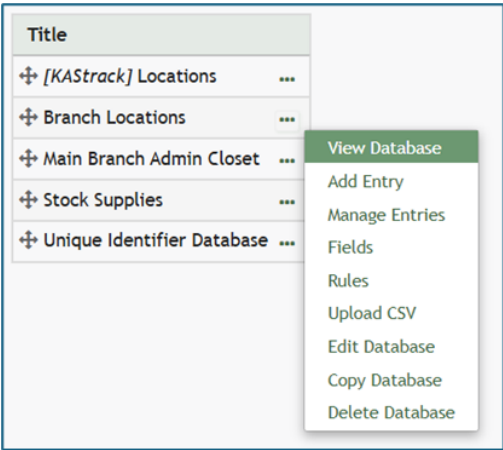
Filter

☒ Show databases in groups ☒ Hide empty groups

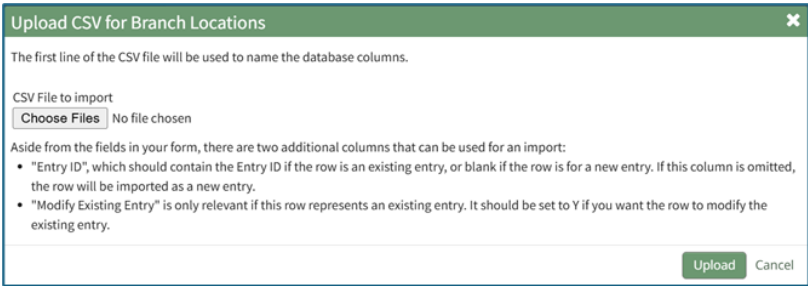
- (Ungrouped)

Title
+ [KAStrack] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

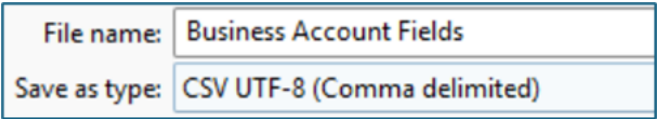
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

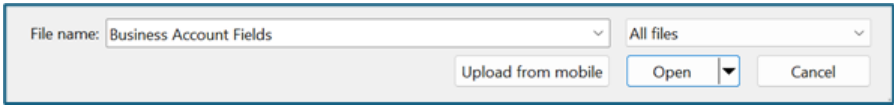


When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.



After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.



Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files

Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name Type: TextValidation:	Name: City Type: TextValidation:	Name: State Type: TextValidation:	Name: Employee Count Type: TextValidation:	Name: Annual Revnue Type: TextValidation:
--	---	--	---	--

Import Now

Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

0 records imported
0 records updated
0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

Fields for database 'Business Client Accounts'

Fields

Rules

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name	Text		Yes
+ City	Text		Yes
+ State	Text		Yes
+ Employee Count	Text		Yes
+ Annual Revnue	Text		Yes
+ Account Manager	Text		Yes

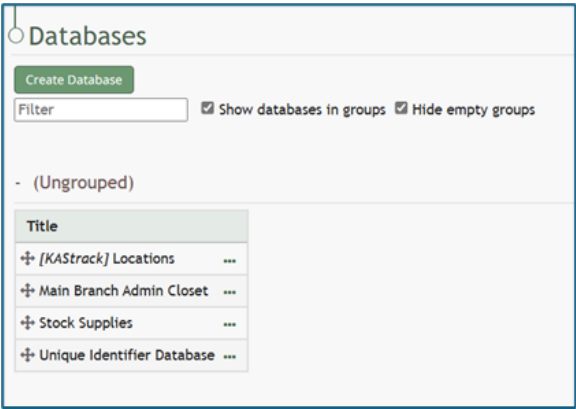
▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

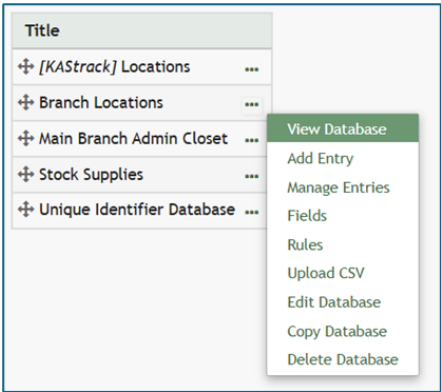
If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

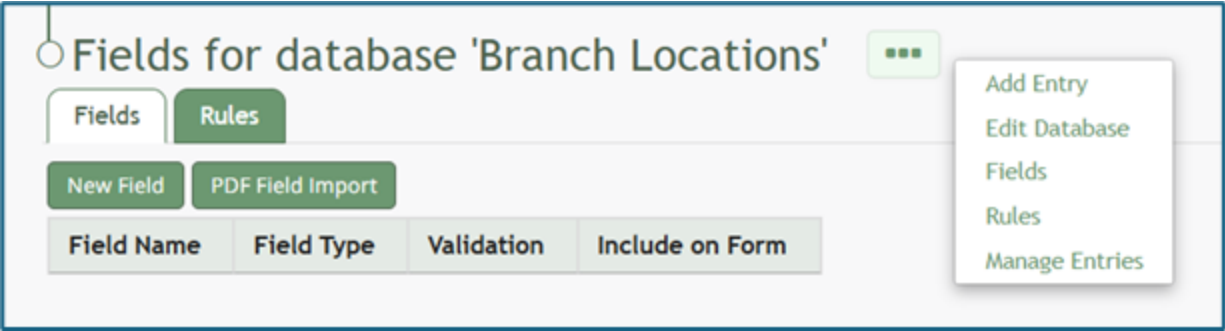


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

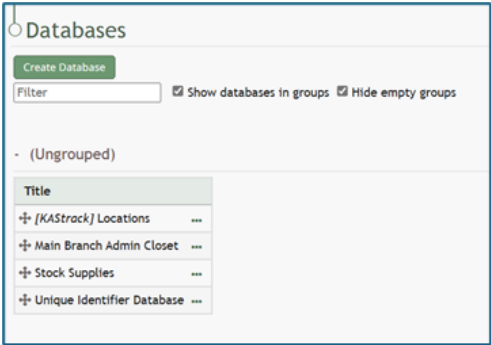
Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

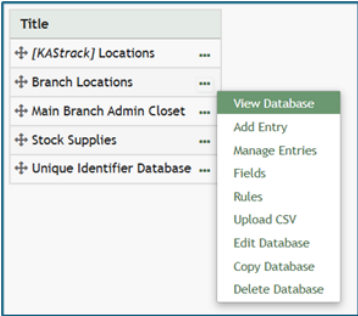
▼ How To: Import Fields from a PDF Field Import

{{@340}}

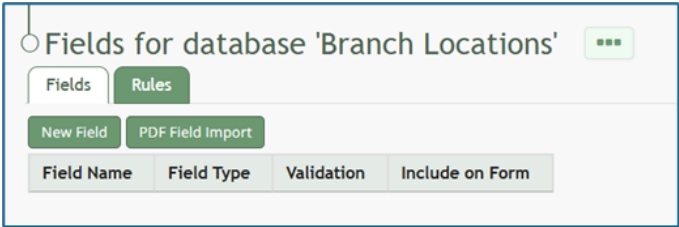
To import field names in bulk from a CSV file, go to the Home Page of the Database Module.



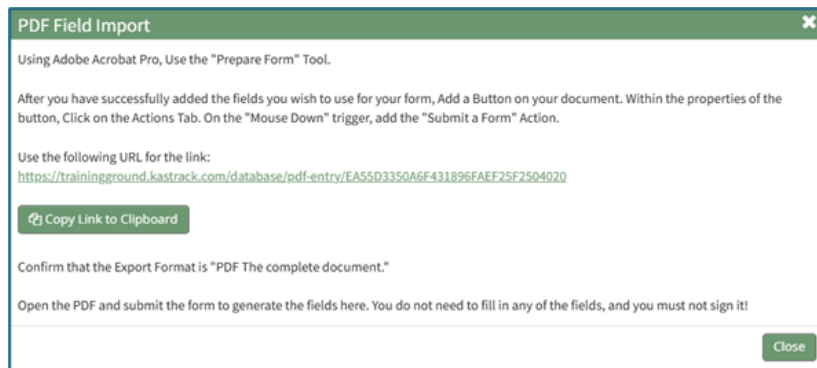
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



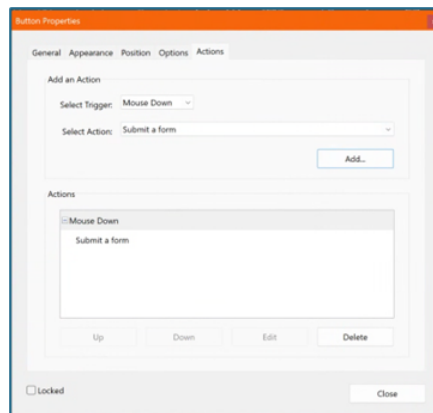
Select “Fields” opening the Fields for database (DatabaseName) Page.



Click the “PDF Field Import” button opening the PDF Field Import Modal.

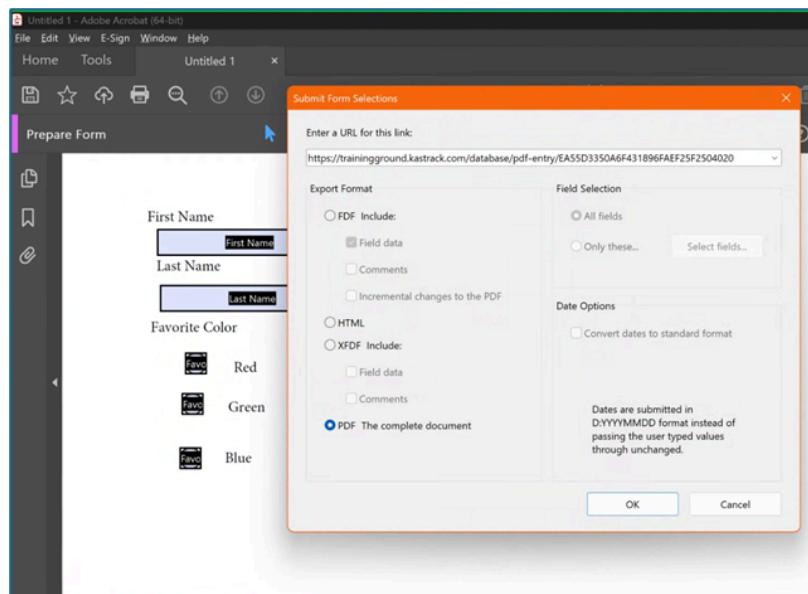


To import fields using a PDF, use the “Prepare Form” tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

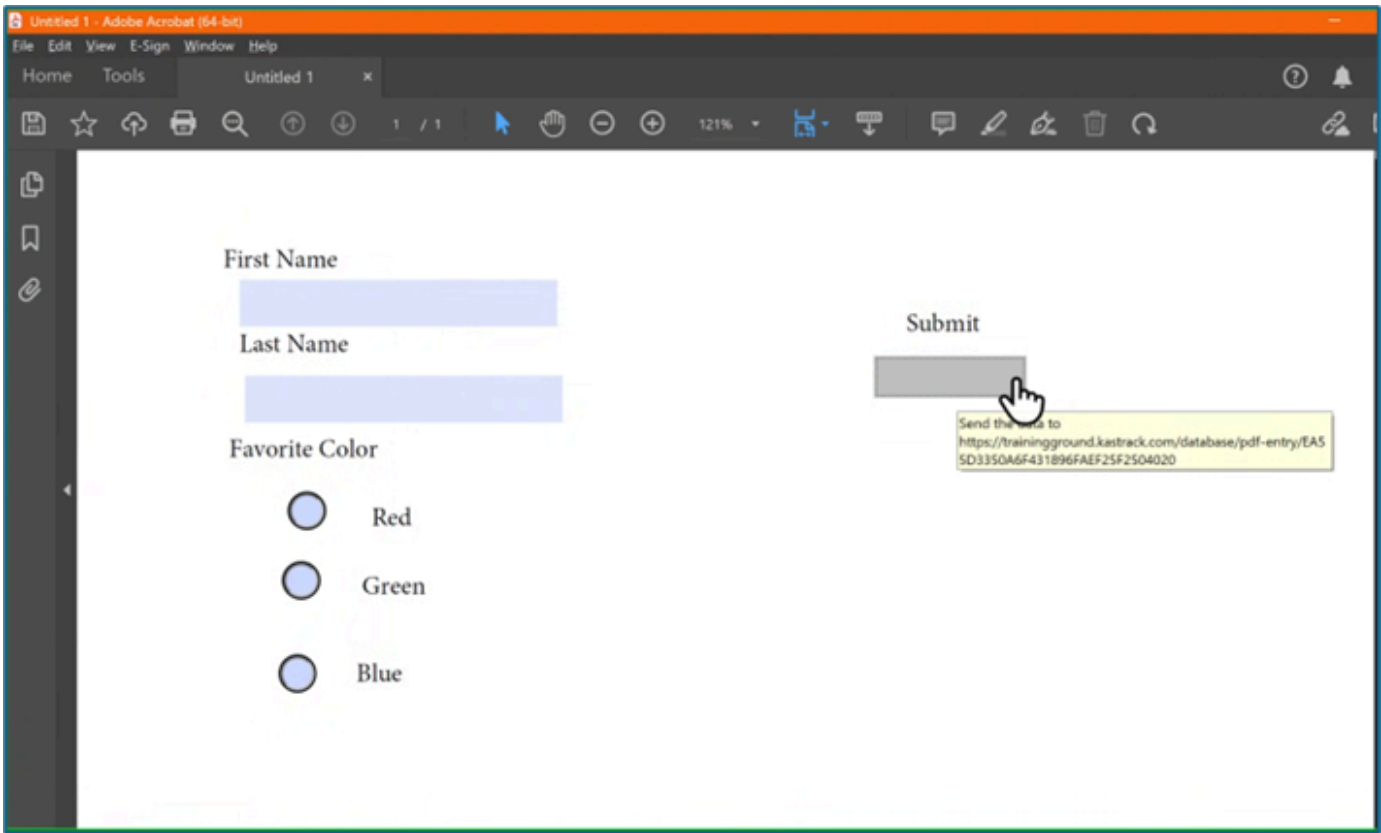


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KASTrack.

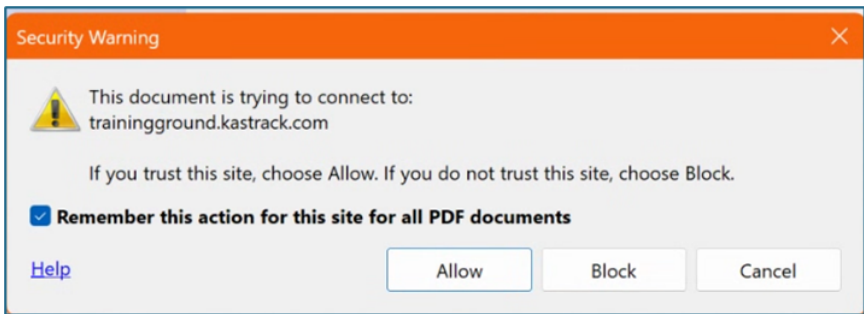


Confirm that the Export Format is “PDF The complete document”.

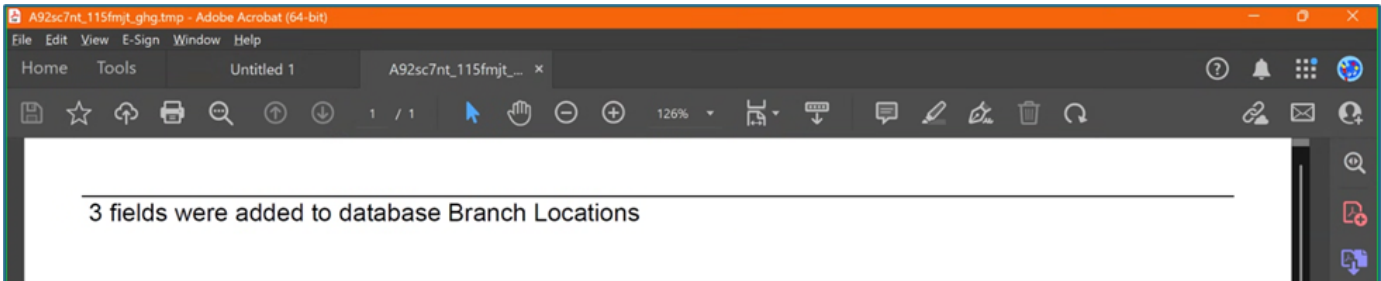


Open the PDF and submit the form to generate the fields here.

You do not need to fill in any of the fields, and you must not sign it.



Select "Allow" and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being

compatible.

Fields for database 'Branch Locations' ⋮

Fields

Rules

Warning: You have a PDF associated with this form. Adding/Modifying or deleting fields may mean that the PDF is no longer compatible with the form.

New Field

Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ First Name ⋮	Text		Yes
+ Last Name ⋮	Text		Yes
+ Favorite Color ⋮	Radios		Yes

If no fields have been entered into the database yet, you can import fields in bulk via a PDF Entry or a CSV file. If fields have already been created in the database, new field must be added individually.

Field Name	Field Type	Validation	Include on Form
+ Inventory Item ⋮	Database : Stock Inventory		Yes
+ Serial Number ⋮	Text		Yes
+ Notes ⋮	Text Box		Yes
+ Cert ⋮	File Upload	Optional	Yes

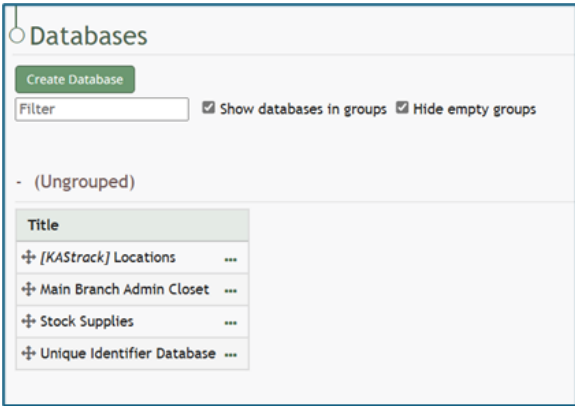
After your fields have been generated, unique inventory items can now be entered into the database in bulk via a CSV file import or entries can be added individually.

▼ How To: Import Database Entries from a CSV

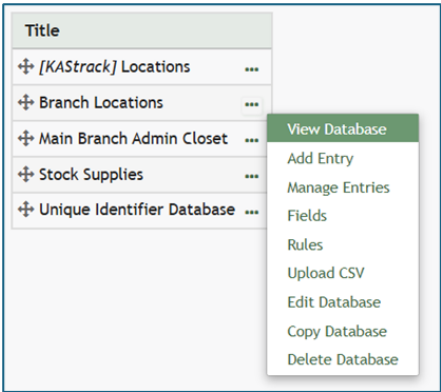
To import database entries from a CSV, database fields must already have been created.

▼ How To: Add a Database Field

To create a database field, go to the Home Page of the Database Module.

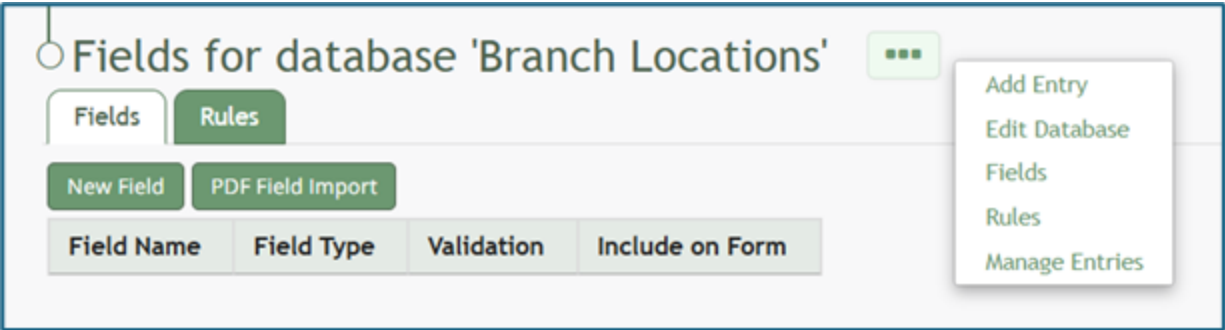


Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select “Fields” opening the Fields for database (DatabaseName) Page.

There are two ways to add a field to the Field Table. Click the “New Field” button above the Field Table or click the three dot (...) icon to the right of the page header opening the context menu and select “Add Entry”.



This opens the New Database Field Modal.

The creation of a new field will always require you to enter a field name. Include an input for the displayed label and select the field type from a dropdown menu. The inputs on the New Database Field Modal will vary based on the Field Type.

Possible field types in the database module include Form Fields, Formatting Fields, Utility Fields, or a Reference to Another Database.

A database field can only have one field type. If you need to utilize another (e.g., for formatting purposes), you can set the displayed label to be same, but the field label must be unique.

For an explanation of field types and the formatting choices associated with each one, reference the Understanding Fields Section of the Database Module in the User Manual.

New Database Field

Field Name (a-z, A-Z, 0-9, -, and space only) *

Displayed Label

Field Type

Section Start

Form Fields

Text

Text Box

HTML Text Box

Checkbox

Dropdown

Radios

Date

Date/Time

File Upload

Image

Password

Formatting

Section Start

Section End

Tabs Start

Tabs End

Utility

Information

Calculated Field

Sequential Number

Once you are finished inputting the information for the new field, select “Save” and the new database field will show in the Field Table.

Fields can also be imported in bulk into a Database from a CSV.

▼ How To: Import Fields from a PDF Field Import

 $\{\{ @340 \}\}$

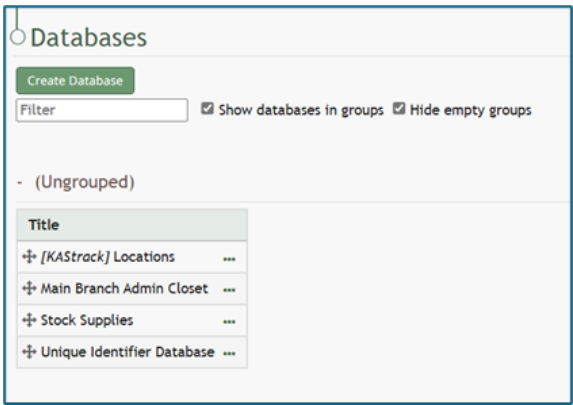
▼ How To: Import Fields from a CSV File Into a Database

If a field has already been added to a database, you are no longer able to bulk import database field names from a CSV file. You are now required to enter each field name individually.

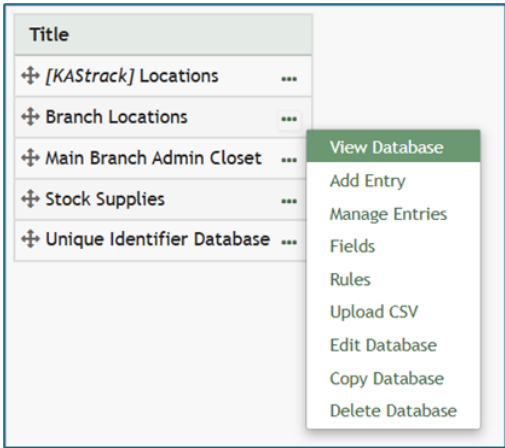
▼ How To: Add a Database Field

{{@321}}

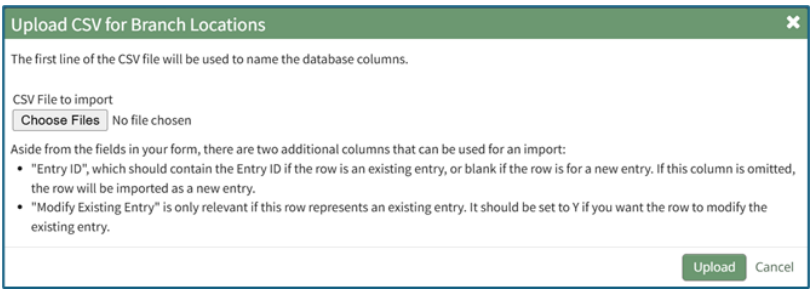
To import database field names from a CSV file, go to the Home Page of the Database Module.



Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



Select "Upload CSV" opening the Upload CSV for (DatabaseName) Modal.



When creating your CSV file, the first row of the CSV file is used. Each individual cell in that row will be a database field used as columns for data entry. When importing bulk field names, the notes in the Upload CSV Modal on “Entry ID” and “Modify Entry ID” are not relevant.

File name:	Business Account Fields
Save as type:	CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:	Business Account Fields	All files
Upload from mobile		Open
		Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

The first line of the CSV file will be used to name the database columns.

CSV File to import

Choose Files Business Account Fields.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- “Entry ID”, which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- “Modify Existing Entry” is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business C

The database fields will be created based on the first line of the CSV file. You can choose the field types and validation for the database fields here.

☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Name: Business Name Type: Text Validation:	Name: City Type: Text Validation:	Name: State Type: Text Validation:	Name: Employee Count Type: Text Validation:	Name: Annual Revnue Type: Text Validation:
---	--	---	--	---

Import Now Cancel

Configure each database field as desired. Field types shown on the dropdown menu include form fields: Text, Text Box, Checkbox, Dropdown, Radios, Data, and Data/Time.

Select “Import Now” and a summary of the import with show on the CSV Upload Page.

○ CSV uploaded for Business Client Accounts

0 records imported
0 records updated
0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

All imported field will now show on the Fields for database (DatabaseName) Page in the Fields Table.

○ Fields for database 'Business Client Accounts' ...

Fields Rules

New Field Filter Fields:

Field Name	Field Type	Validation	Include on Form
+ Business Name ...	Text		Yes
+ City ...	Text		Yes
+ State ...	Text		Yes
+ Employee Count ...	Text		Yes
+ Annual Revnue ...	Text		Yes
+ Account Manager ...	Text		Yes

▼ How To: Import Fields from a PDF Field Import

This method of importing Fields from a PDF requires access to Adobe Acrobat Pro.

If a field has already been added to a database, you are no longer able to bulk import database field names from a PDF Field Import. You are now required to enter each field name individually.

▼ How To: Add a Database Field

{{@321}}

To import field names in bulk from a CSV file, go to the Home Page of the Database Module.

○ Databases

Create Database

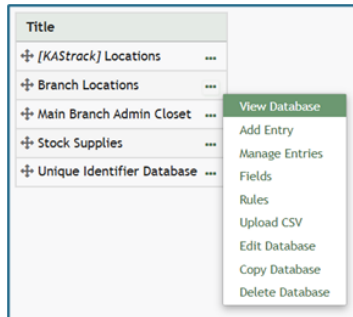
Filter

☒ Show databases in groups ☒ Hide empty groups

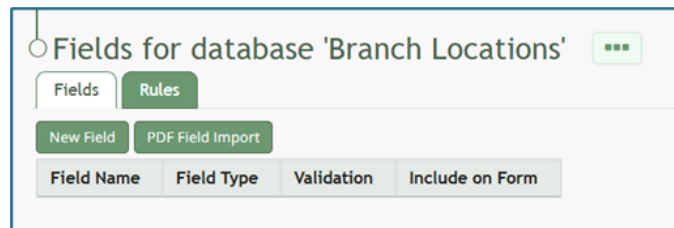
- (Ungrouped)

Title
+ [KASrock] Locations ...
+ Main Branch Admin Closet ...
+ Stock Supplies ...
+ Unique Identifier Database ...

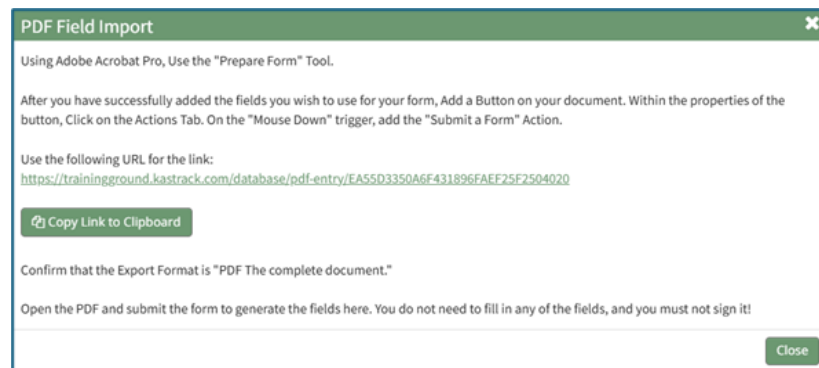
Click the three dot (...) icon to open the context menu of the database you wish to enter fields for.



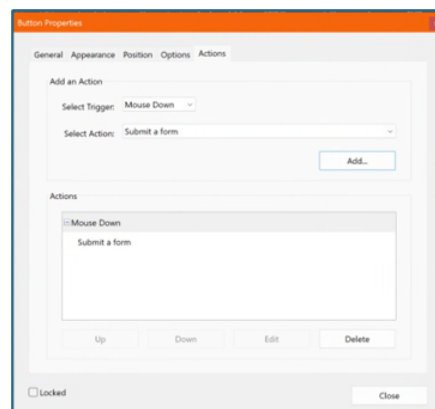
Select "Fields" opening the Fields for database (DatabaseName) Page.



Click the "PDF Field Import" button opening the PDF Field Import Modal.

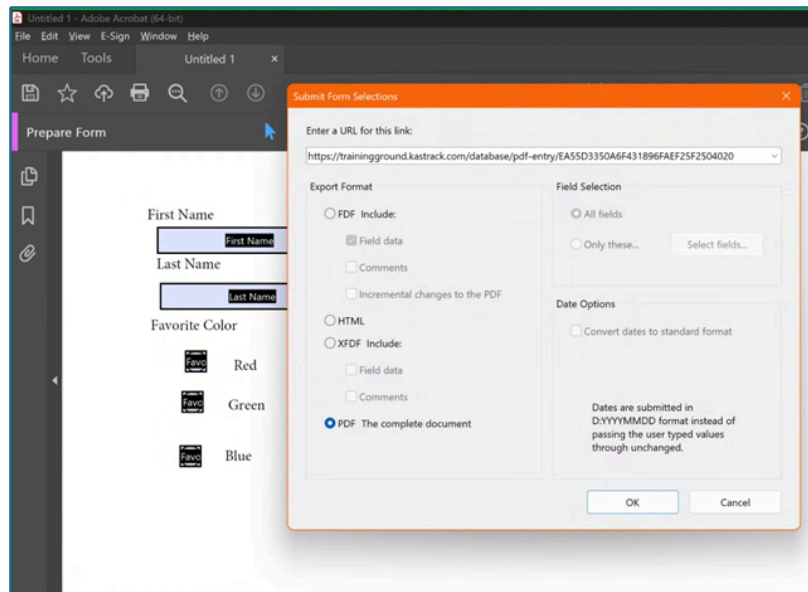


To import fields using a PDF, use the "Prepare Form" tool in Adobe Acrobat Pro. Add the fields you wish to use for your form. Add a button on your document.

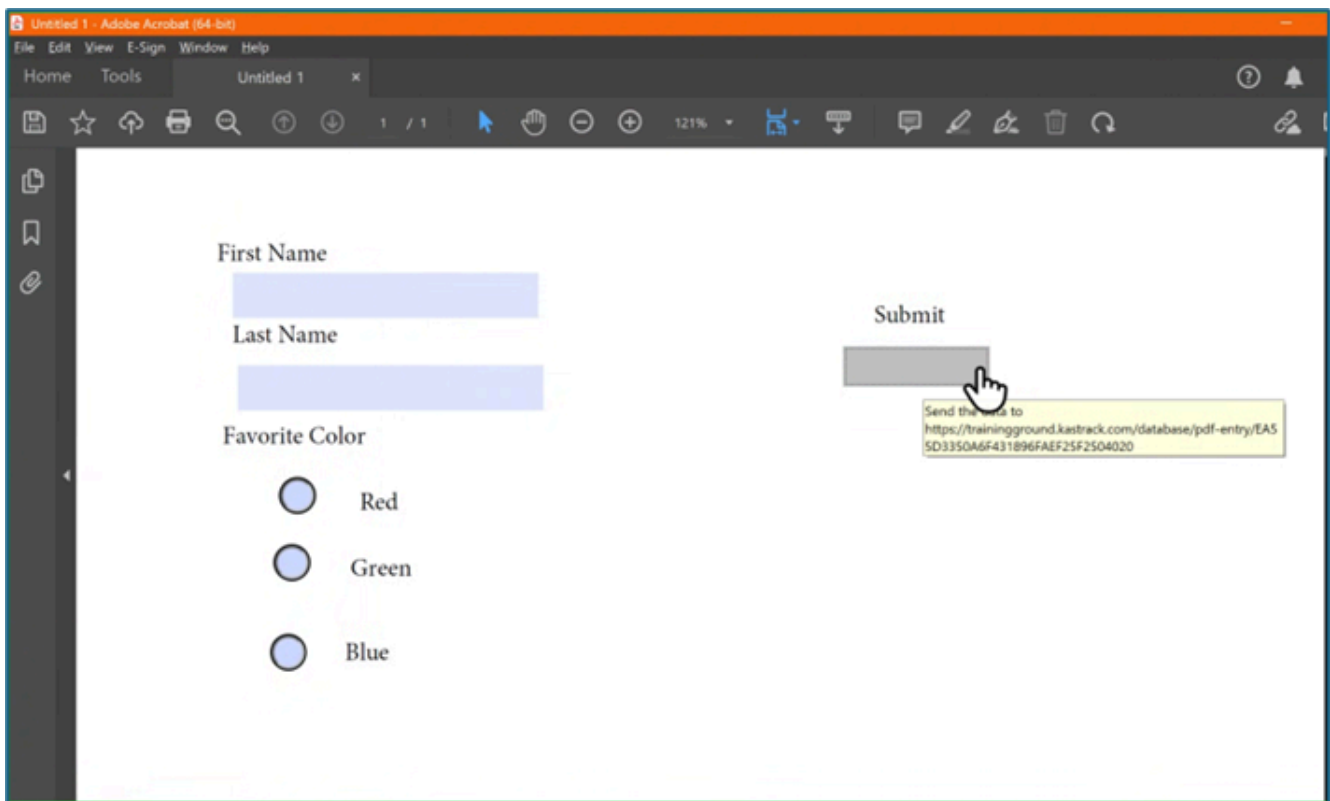


Within the button properties, click on the Actions Tab. On the “Mouse Down” trigger, add the “Submit a Form” Action.

Use the URL link provided on the PDF Field Import Modal in KAStack.

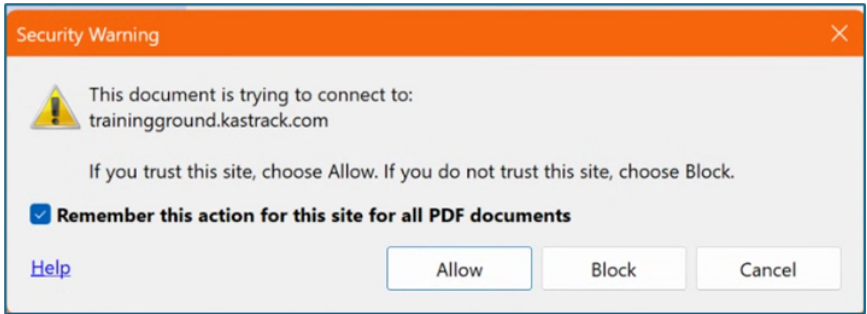


Confirm that the Export Format is “PDF The complete document”.

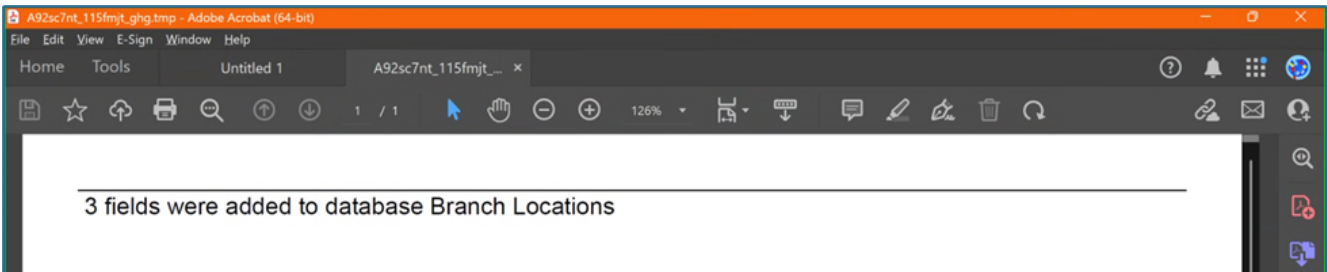


Open the PDF and submit the form to generate the fields here.

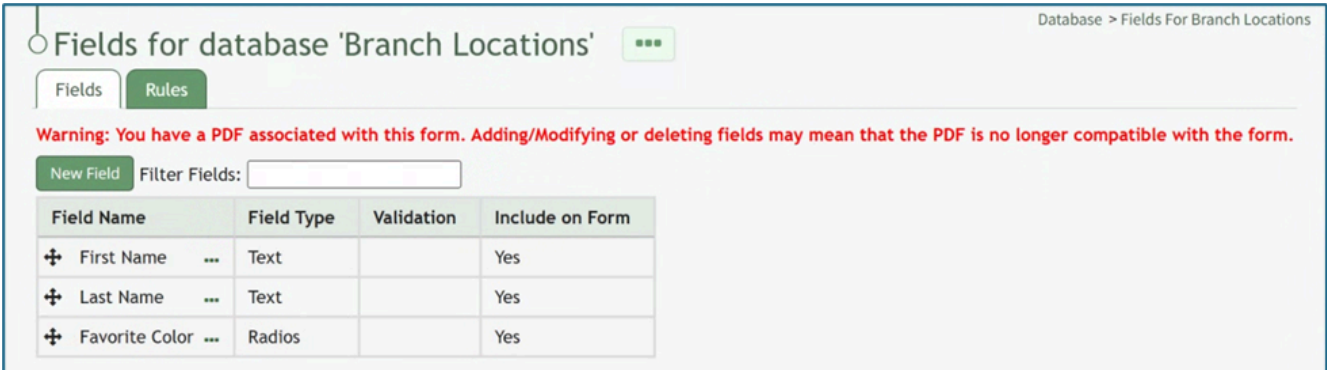
You do not need to fill in any of the fields, and you must not sign it.



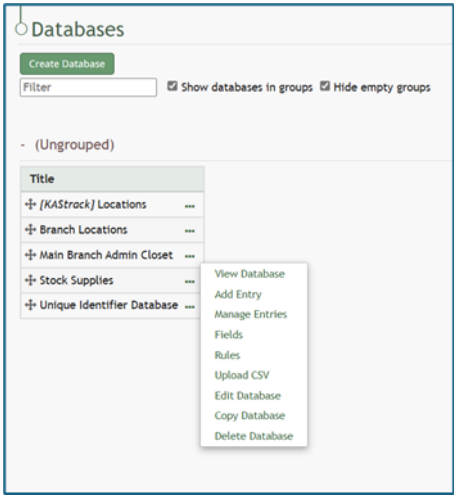
Select “Allow” and the PDF will confirm that the fields were added to the database.



Go to the Fields Table in the database Monday, and a warning now states that a PDF is associated with the form and that adding/editing or deleting fields may result in the PDF no longer being compatible.

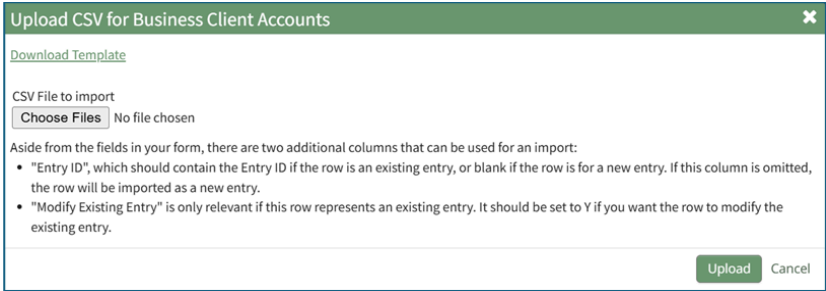


To import database entries from a CSV, go to the Home Page of the Database Module and click the three dot menu to the right of the database you wish to import entries into.



Select “Upload CSV” opening the Upload CSV for (DatabaseName) Modal.

You can also import entries by selecting “Manage Entries” from the context menu and selecting the “Import Entries” button underneath the Database Entries Page header, which opens the same Upload CSV Modal.



Click the “Download Template” link at the top of the modal and a CSV file will be downloaded to your personal device. See Notes on the Download Template before uploading your CSV file to ensure it is done correctly.

▼ **Notes Regarding the Downloadable Template for Uploading CSV Files**

The first row of the CSV file is for each of the database fields. If you download a CSV Template from the Upload CSV Modal, two additional column headers will show that are not database fields: Entry ID and Modify Existing Entry.

If you are importing database entries and no entries have been added to the database yet, leave these columns blank in your upload.

If database entries already exist in the database, the Entry ID column will contain the unique system generated ID for each pre-existing database entry. Leave this column blank if the row is to be imported as a new entry. The second column, Modify Existing Entry, should have a “Y” input if the existing entry is being modified and an “N” input if it has not been modified. Leave it blank if the entry is new.

File name:

Business Client Account Database Entries

Save as type:

CSV UTF-8 (Comma delimited)

After creating your Database Fields CSV File, save it as a CSV UTF-8 for importing.

Click the “Choose File” button and open the relevant file from your personal device.

File name:

Business Client Account Database Entries

All files

Upload from mobile

Open

Cancel

Confirm that the correct CSV file now shows in the Upload CSV Modal.

Upload CSV for Business Client Accounts

[Download Template](#)

CSV File to import

Choose Files

Business Client Account Database Entries.csv

Aside from the fields in your form, there are two additional columns that can be used for an import:

- "Entry ID", which should contain the Entry ID if the row is an existing entry, or blank if the row is for a new entry. If this column is omitted, the row will be imported as a new entry.
- "Modify Existing Entry" is only relevant if this row represents an existing entry. It should be set to Y if you want the row to modify the existing entry.

Upload

Cancel

Select the “Upload” button.

Upload CSV for Business Client Accounts

Database > Import CSV To Business Client Accounts

Ignore the first 1 rows ☐ Use IDs for Reference Fields

Preview: Showing the first 5 rows

Entry ID	Modify Existing Entry	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
		Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews
		Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
		Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
		RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
		Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz

Import Now

Cancel

The entries imported from the CSV file will now show on the Upload CSV for (DatabaseName) Page.

The system automatically indicates to ignore the first row. Click “Import Now” if there are no errors.

A summary of the import will now show on the CSV Upload Page.

CSV uploaded for Business Client Accounts

5 records imported

0 records updated

0 records failed to import

[Home](#) · [Entries for Business Client Accounts](#)

Click the “Entries for (DatabaseName)” link to see all imported entries in the Manage Entry Table.

Entries for database 'Business Client Accounts' ...

Add EntryImport EntriesExport Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date	Business Name	City	State	Employee Count	Annual Revenue	Account Manager
19 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Prairie Data Solutions	Lafayette	LA	61	\$10.2 million	Natalie Cruz
18 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	RedRiver Fabrication Works	Shreveport	LA	76	\$13.8 million	Marcus Delaney
17 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Gulfstream Compliance Group	New Orleans	LA	28	\$5.1 million	Alicia Tran
16 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Northern Sands Logistics	New Orleans	LA	115	\$22.5 million	Alicia Tran
15 ...	Mitzi Orkus	Approval not required	Tue Oct 14 2025 at 4:02 PM	Bayou Environmental Systems	Baton Rouge	LA	42	\$8.3 million	Jordan Matthews

▼ How To: Add an Individual Database Entry

To add a database entry, go to the Home Page of the Database Module. Click the three dot (...) icon to the right of the database you wish to add an entry to opening the context menu. Select “Add Entry”.

You can select “Add Entry” from any context menu in the Database Modal without returning to the Home Page.

Title

+ [KAStrack] Locations ...

+ Branch Locations ...

+ Main Branch Admin Closet ...

+ Stock Supplies ...

+ Unique Identifier Database ...

View Database

Add Entry

Manage Entries

Fields

Rules

Upload CSV

Edit Database

Copy Database

Delete Database

Selecting “Add Entry” opens the New Database Entry modal. Two visual examples of this modal have been included below.

The New Database Entry Modal will vary for every database, based on the fields that have been created for it.

New Database Entry

Locations

Shelf1 - Bin1

Items

Quantity

Part Type

Please Choose...

Category

Client

Save

Cancel

New Database Entry

Shelf

Please Choose

Bin

Please Choose

Save

Cancel

Input the entry data into the modal. Select “Save” for the new entry to be added to the database.

If no fields have been created for the database, the New Database Entry Modal will show without any fields as seen below.

New Database Entry

Save

Cancel

If you select to “Save” a database entry prior to the creation of database fields, an entry will be assigned an Entry ID by the system and will show in the Entries Table. The submitter, approval status, and entry date will be logged.

Entries for database 'Branch Locations'

Add Entry

Import Entries

Export Entries

Filter

☐ Enable Bulk Edit Mode

Entry ID	Submitter	Approval Status	Entry Date
12	Mitzi Orkus	Approval not required	Mon Oct 13 2025 at 6:18 PM

Now that your unique items database has been created and filled with inventory item entries, it is ready to be integrated into an inventory.