

Custom Forms Menu Options

Choose how users open custom forms from the client record.

Purpose	Configure how Custom Forms appear from the client record menu.
Who should do this	Central Administration users with Common Storage permission.
Use this guide when you need to	Replace the standard Custom Forms link with individual custom form links.
Main warning	Changing verticalMenuFormDesigns changes how users access custom forms from the client menu.
Primary reference	Custom Forms Menu Options - jProg Support

Quick path

Central Administration > Administrative Options > Server Management > Common Storage Values > verticalMenuFormDesigns.

Before you begin

Confirm whether the standard Custom Forms menu is sufficient.

Confirm you have Edit Common Storage permission.

Tell users if their client menu will change.

Important

The Common Storage Values editor requires the Edit Common Storage permission and is available in the Central domain.

Choose the menu behavior

Use one of the available Custom Forms menu options.

Item	What it does	When to use it
Option 1	Default behavior: the client menu shows one Custom Forms link.	Users click Custom Forms, then choose a form button.
Option 2	The client menu shows individual links to each available custom form.	Set verticalMenuFormDesigns to 1 in Common Storage Values.

How to confirm it worked

1. The client record menu shows the expected Custom Forms behavior.
2. Users can open the correct form history or form link.
3. Users understand the new navigation path.

Troubleshooting and common questions

Why do I not see Common Storage Values?

Confirm you are in Central Administration and have Edit Common Storage permission.

Why did user navigation change?

Check whether verticalMenuFormDesigns is set to 1.

When to contact Help Desk

Contact your CAREWare Help Desk or local administrator when:

- users cannot find custom forms after the change
- the setting affects more users than expected
- you do not have permission to edit Common Storage Values

Related HappyFox references

Document	Use it for
Form Designer	Overview, planning guidance, key terms, and permissions.
Custom Forms Menu Options (primary)	Configure how custom forms appear from the client record menu.
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