

Solution Note CF-05 - Linking to External Systems

How to set up links to external systems using Touchplan Custom Fields

Problem Statement

When using multiple technology solutions on a project, it can be prohibitively tedious to switch back and forth between the two. Losing context from the work at hand and external information can result in miscommunication and deviations from the plan.

Solution

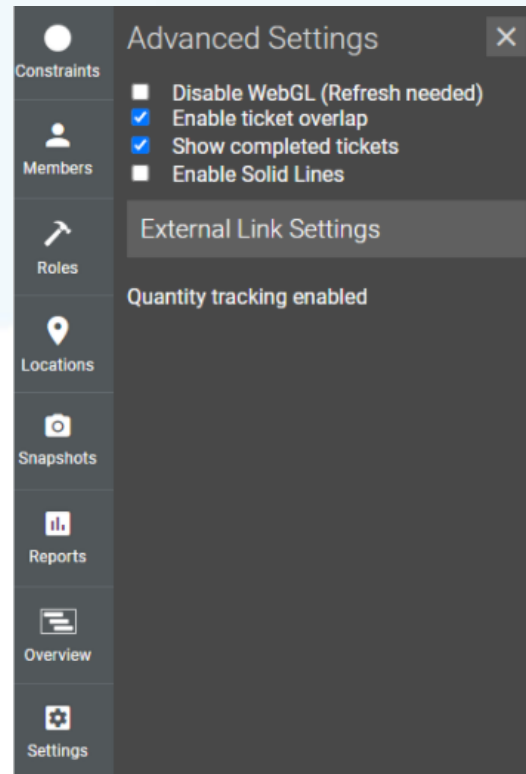
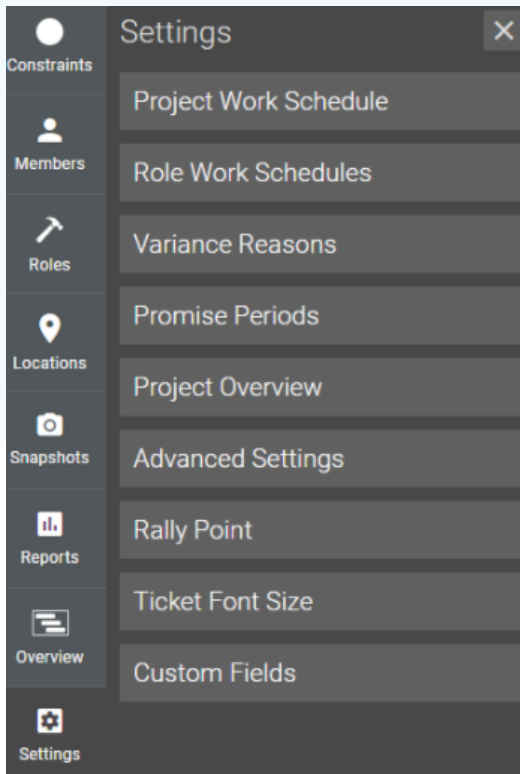
Enable integration through hyperlinks in Touchplan custom fields to direct users to a specific instance in another platform's interface. This makes Touchplan objects a reference point to which any number of information sources can be linked.

Related Materials

Object	Link	Description
Video	Intro Video	Introduction to Custom Fields
FAQ	Use Custom Fields	How to Use Custom Fields

Step-by-step instructions

1. Add domains to 'white list' by going to 'Settings' -> 'Advanced Settings' -> 'External Link Settings'



External link settings

Enter allowed websites for link custom fields.
Separate each sites using commas.

Allow list

touchplan.io, realitycapture.xyz

CANCEL

SAVE

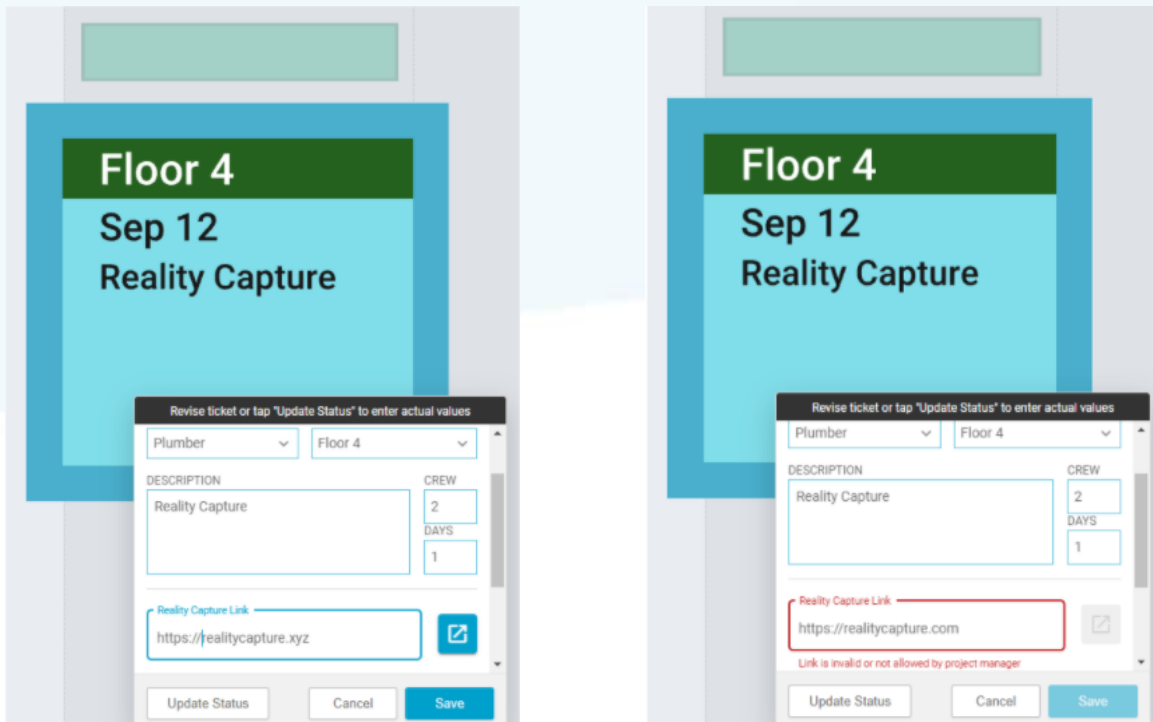
2. Create custom fields with type hyperlink by going to 'Settings' -> 'Custom Fields' -> 'Add Custom Field' then choosing link type

The screenshot shows a form with two tabs: 'Info' and 'Roles'. The 'Info' tab is selected. The form contains the following elements:

- Field label:** Reality Capture Link
- Type:** Link (indicated by a dropdown arrow)
- Ticket types:**
 - Tasks
 - Milestones
 - Constraints

3. To add a hyperlink to custom field, Copy the desired URL and paste into the custom field
Note: the URL must have an http:// or https:// prefix

4. The software will check the hyperlink you inserted vs. the 'allow list' of domains you input in Step 1. If valid, the box will turn blue. Otherwise, the box will turn red and the hyperlink will not work.



Note: When using in conjunction with productivity capture software, it is best practice to only hyperlink to milestones. Typically, milestones are in the same location as all predecessor activities and communicate hand-offs between trades.

Help is available

For help with Image Attach, visit the FAQ here:

[Use Custom Fields | Touchplan.io Help Center](#)

For live help, click on the "Support" drop down in the top right corner of your planning screen and click the "Live Chat" button. This will connect you to a CS representative who will be able to answer any questions that you may have.

Issues, concerns, defects in this note?

We welcome any feedback you may have on this note to help us continually improve our materials and provide the best support that we can to our customers.

Please send any comments, suggestions, or reports of errors to the CS Live Chat