Spec

Custom Columns MVP

What & Why

The columns we've made available in Site IQ are a good slice of what users need, definitely meeting the "80" of "80/20". But what about the "20"? Sometimes the factor a client cares about isn't in our column set. Today, users hack this with property notes, as we expected they would. But we want to give them a real solution, and that solution is custom columns.

Each broker team is different, right down to their language. Terminology for the same thing can differ from team to team: what we call "Rent," they might call "Rent Triple Net". So we're also offering a way for teams to rename our built-in columns.

How we validated

This is a much-requested feature, and the team has been discussing it for a long time. The overall concept was clear, but we had questions about the details. Should custom columns be part of a project? A team setting? Should you be able to create them right from the Properties page? Who has permission?

To answer these questions, I found the requests for custom columns in our UXR database and briefly re-interviewed the two users who asked for them. Their use cases were similar: working with national clients who need varied and specific data. Speaking with them made clear that creating a column shouldn't be "too easy" to do, as it doesn't happen that often, and it affects the whole team.

I channeled this feedback into lo-fi mocks and reviewed them with the team. Then I iterated into a lo-fi interactive prototype, which I validated with the two users.

Screens

[Figma link](#)

Mockups
- UI on the Settings page
- UI in the Edit columns dropdown

Spec sheets
- Empty states for custom column management ui
- Modals for custom column management
- Spacing for new UI elements
- Hover and active states for settings table rows

Interactive prototype (used for testing, so very lofi and incomplete)

What's changing

New tab of Settings: Customize columns
This tab has two sections below it. Each has a title and subtitle, an add button, and a table of data in rows. The table lists the most recently created row first. When there are no rows, use the empty states shown in Figma.

- **Custom columns**
  The first section is where users manage their team's unique columns.

Permissions	Only team admins can create, rename, and delete columns. Regular users can see them listed on the settings page, but not edit them.
Data	For now, all custom columns store unstructured text, but other data types will be important in the future.
Where	Custom columns are shown in the properties table, the edit columns menu, the search UI, excel export and import, the deliverable creator, and print and interactive deliverables.
Interaction	When a custom column is created, it should be turned on and inserted so that it's right after the last visible column in the user's table config — but only on the properties view. Projects shouldn't be affected.

- **Renamed columns**
  This section lets users change the name of our built-in columns to match their team's own terminology.

Permissions	Only team admins can rename columns or un-rename them. Regular users can see them listed on the settings page, but not edit them.
Where	Renaming a column affects the column headers in the properties table, the edit columns menu, the search UI, excel export and import, the deliverable creator, and print and interactive deliverables.
Interaction	Users pick the column to rename from a dropdown. The dropdown lists only built-in Site IQ columns, not custom columns, in alphabetical order. Any columns already renamed are listed, but greyed out, like this: `<original_name> (renamed "<renamed_name>")`

Other UI

- **Update to Settings table pattern & row interaction**
  This design reuses our pattern for settings tables: click a button at the top right to show a modal that creates a row; manage rows by clicking them to show the same modal. With this update I'd like to add an affordance that rows are editable.
  The edit pencil is a little inline ghost button and should behave like other ghost buttons. Clicking anywhere on the row should also bring up the modal.

- **Shortcut in Edit columns menu**
  To make this feature extra discoverable, add a button at the bottom of the edit columns menu in the property table. The button links to this page of Settings. The button's size is static, but the menu should still resize its height properly with the window height.