

13.11. Custom fields

You can create custom fields that appear in different areas in mSupply. These allow you to record additional information and customise mSupply for your needs.

You can create custom fields in the following areas:

- Customer invoice
- Supplier invoice
- Store
- Requisition
- Item
- Item category
- Quote line
- Name (of customers, suppliers, prescribers etc.)
- User



Only edit custom fields if you are confident with the information in this page and fully understand the content. Otherwise you could cause some things to stop working in your copy of mSupply! This is true for all settings, but please be especially careful with custom fields.

Creating custom fields

1. Navigate to the **Admin** tab and click the **Preferences** button.



2. Select **Custom Fields** from the list on the left.

3. Select the area requiring custom fields from the **Table to set custom data fields for** dropdown list.



4. Click the **New Field** button.

5. Click on the new line in the **Field Label** column to change the name of the custom field.

6. Click the small arrow in the **Field Type** column and choose from the drop-down list. The options for your new field are:

- **Text:** User can type free text.
- **Number:** User can only type a number.
- **Boolean:** User can tick a checkbox.
- **Date:** User can only enter a date.
- **List:** User can only select an option from a list.



6. If you use a **List** field type, highlight the line and click **Add Item** to enter the options that will appear in the list. To delete an option, select the item from the list and click **Delete Item(s)**.

Customer invoice

Name: Merlo Health Centre
 Their ref: 8459 MER
 Comment:
 Confirm date: 00/00/00
 Category: None
 Colour: Black
 Invoice: 0
 Entry date: 24/10/19
 Goods received ID: 0
 Status: nw
 Entered by: user 1 (pass= user1)
 Store: General Warehouse

General Summary by Item Summary by Batch Transport details Log **Custom data**

Delivery organised for: 21/11/19 **Field Type = Date**

Delivery method:
 Truck
 Ship
 Plane
 N/A - staff will collect **Field Type = List**

OK & Next Delete OK

Supplier invoice

When creating a supplier invoice:

Click the **Custom Data** tab.

In this example, we added two custom fields: a **Boolean** and a **Text** field type.

Supplier invoice

Name: Pulo World Medicine Suppliers
 Their ref: 4563 pulo
 Comment:
 Confirm date: 00/00/00
 Category: None
 Colour: Black
 Invoice number: 0
 Entry date: 24/10/2019
 Status: nw
 Goods received ID: 0
 Purchase Order ID: 0
 Requisition ID: 0
 Entered by: user 1 (pass= user1)
 Store: General Warehouse

General Summary by Item Summary by Batch Price Log **Custom data**

☒ Payment made **Field Type = Boolean**

Reason if not yet paid **Field Type = Text**

☐ Hold ☐ Finalise Export batch: 0 Margin: 0.00

OK & Next Delete OK

When creating a store:

In this example, we added one custom field: a **Number** field type.

The screenshot shows a window titled "New store" for "Merlo Health Centre". At the top, there are five tabs: "General", "Preferences", "Logo", "Custom fields" (which is highlighted with a red box), and "Master lists". Below the tabs, there are two icons: a plus sign labeled "New line" and a minus sign labeled "Delete line(s)". The main area contains a table with two columns: "Field label" and "Field value". The first row has the label "Number of staff at facility" and the value "2". This row is highlighted with a red border. Below it, the text "Field Type = Number" is displayed in orange. The table has multiple rows with alternating light blue and white backgrounds. At the bottom right, there are "Cancel" and "OK" buttons.

Requisition

When creating a requisition:

Item

When creating a new item:

Item category

When creating a new item category:

Quote line

When creating a quote line:

Name

When creating a new name (e.g. customer, supplier, prescriber etc.):

User

When creating a new user:

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

https://docs.msupply.org.nz/preferences:custom_fields?rev=1571936314

Last update: **2019/10/24 16:58**

