

## 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.

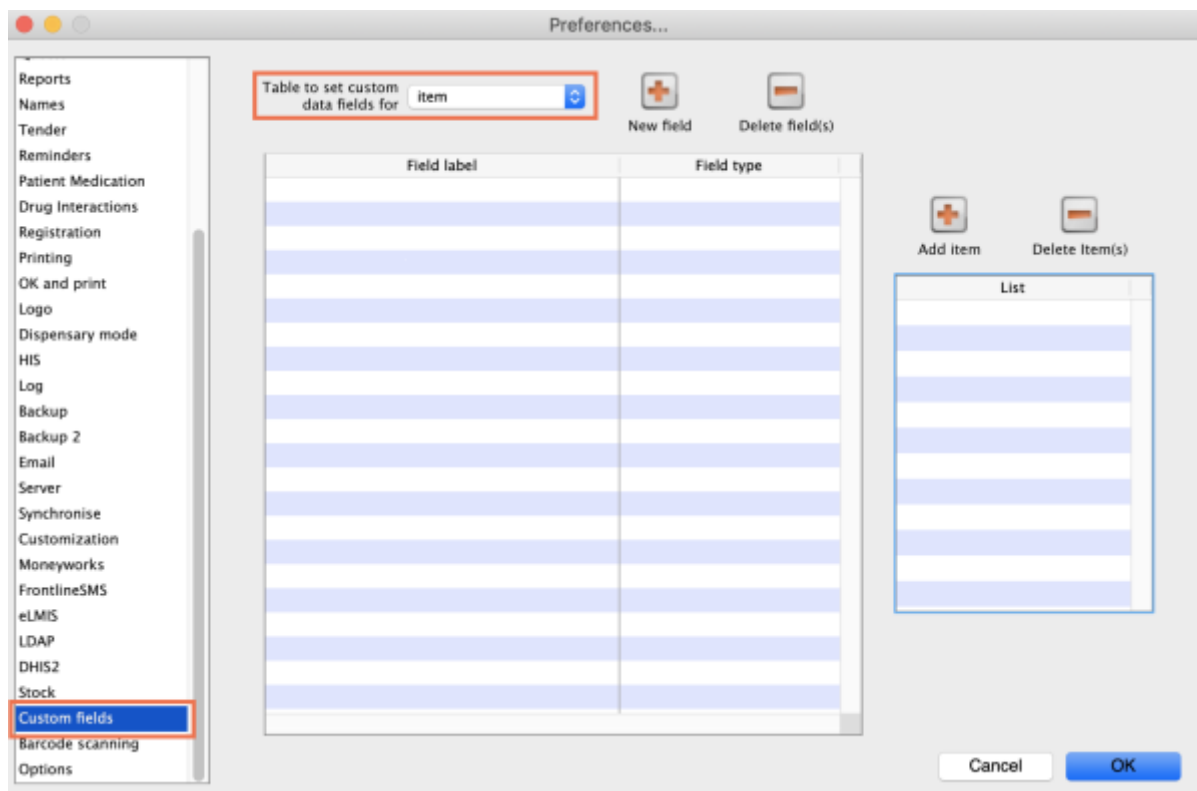
### Creating custom fields

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



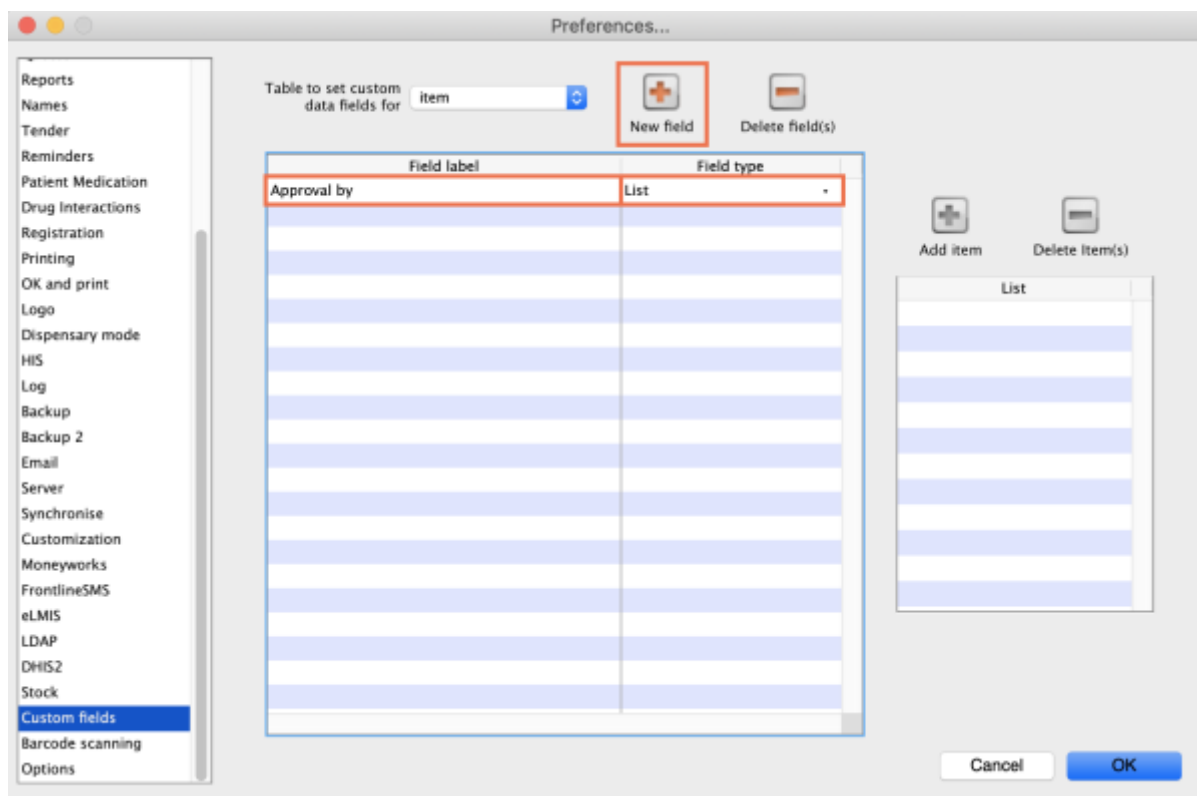
2. Select **Custom Fields** from the list on the left.

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

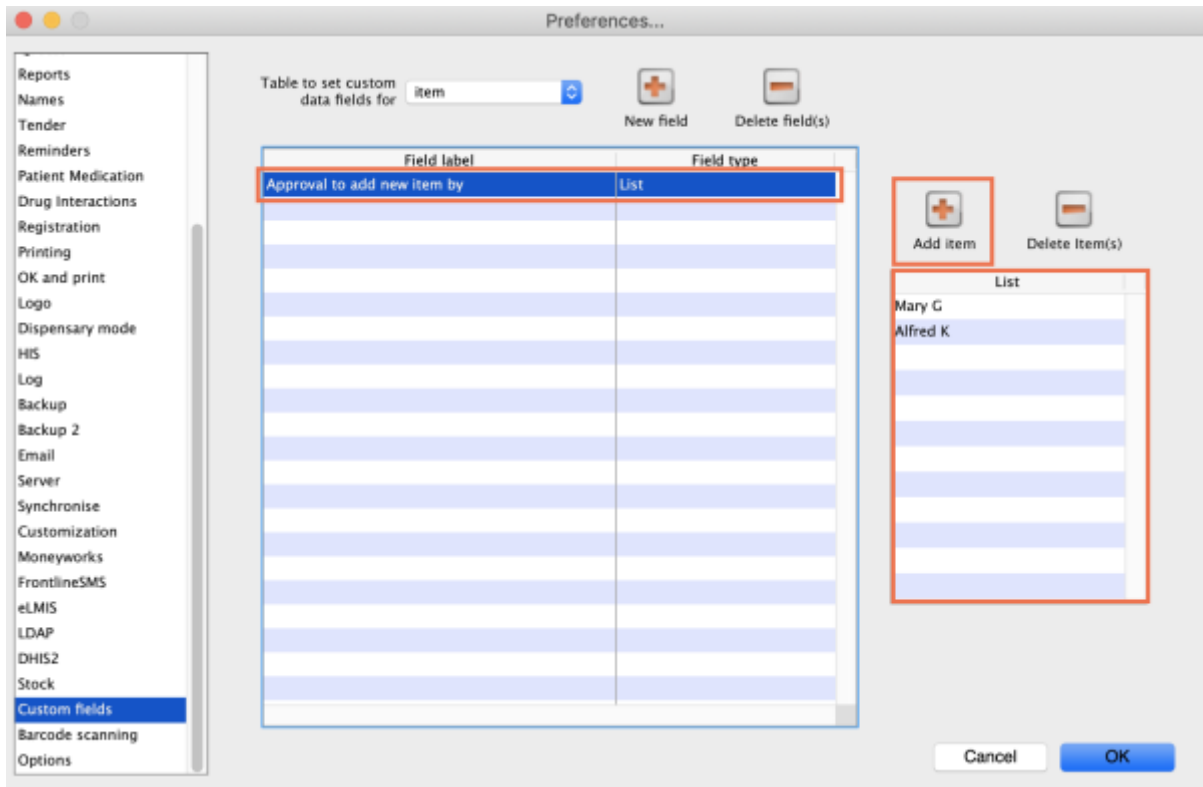


4. Click the **New Field** button.

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 choose 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)**.



7. Click **OK**.

If you want to delete a custom field, highlight the line and click **Delete field(s)**.

## Using custom fields

This section shows where custom fields appear in each area after they are created.

## Customer invoice

### When creating a customer invoice:

Click the **Custom Data** tab.

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

**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

## Store

### When creating a store:

Click the **Custom Fields** tab.

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

The screenshot shows a 'New store' window for 'Merlo Health Centre'. The 'Custom fields' tab is selected. Below the tabs are 'New line' and 'Delete line(s)' buttons. A table with two columns, 'Field label' and 'Field value', contains one row: 'Number of staff at facility' and '2'. An orange text overlay 'Field Type = Number' is positioned over the table. 'Cancel' and 'OK' buttons are at the bottom right.

Field label	Field value
Number of staff at facility	2

## 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:

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