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

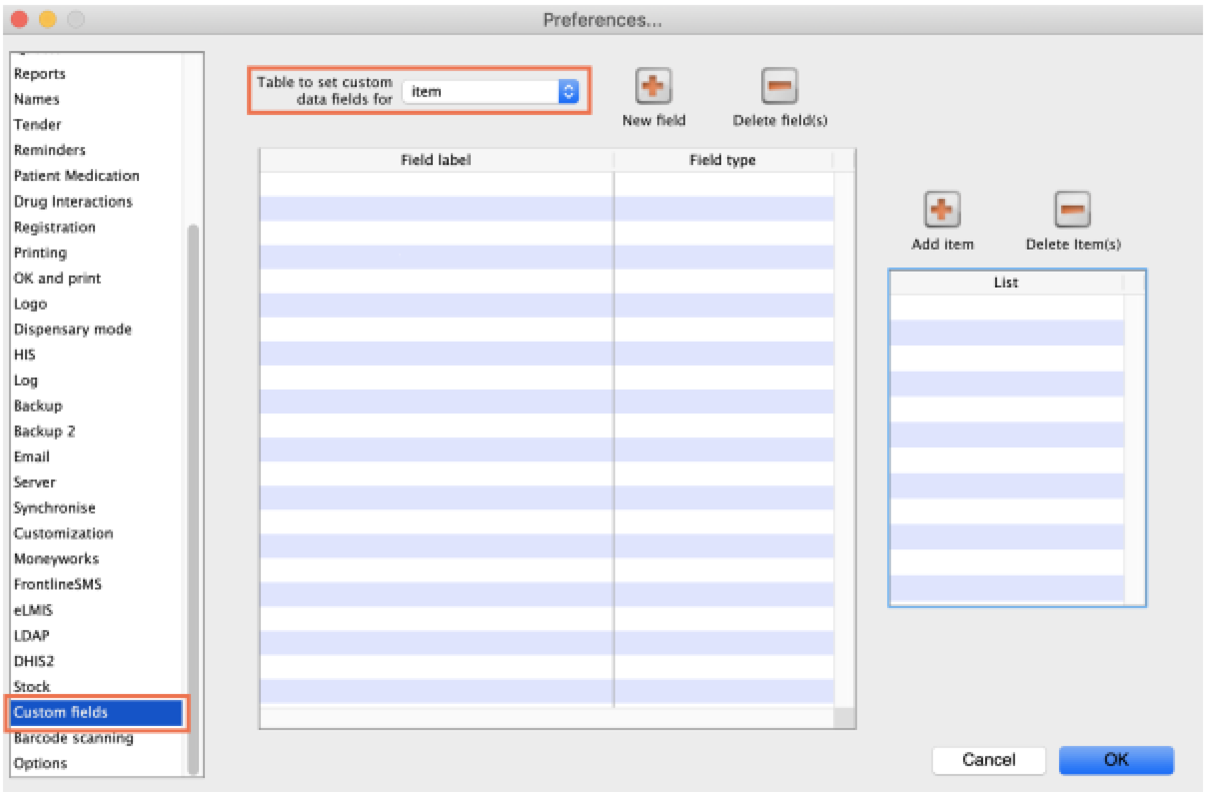
Only edit custom fields if you are confident with the information in this page and fully understand the content. Otherwise you could cause some things to stop working in your copy of mSupply! This is true for all settings, but please be especially careful with custom fields.

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.

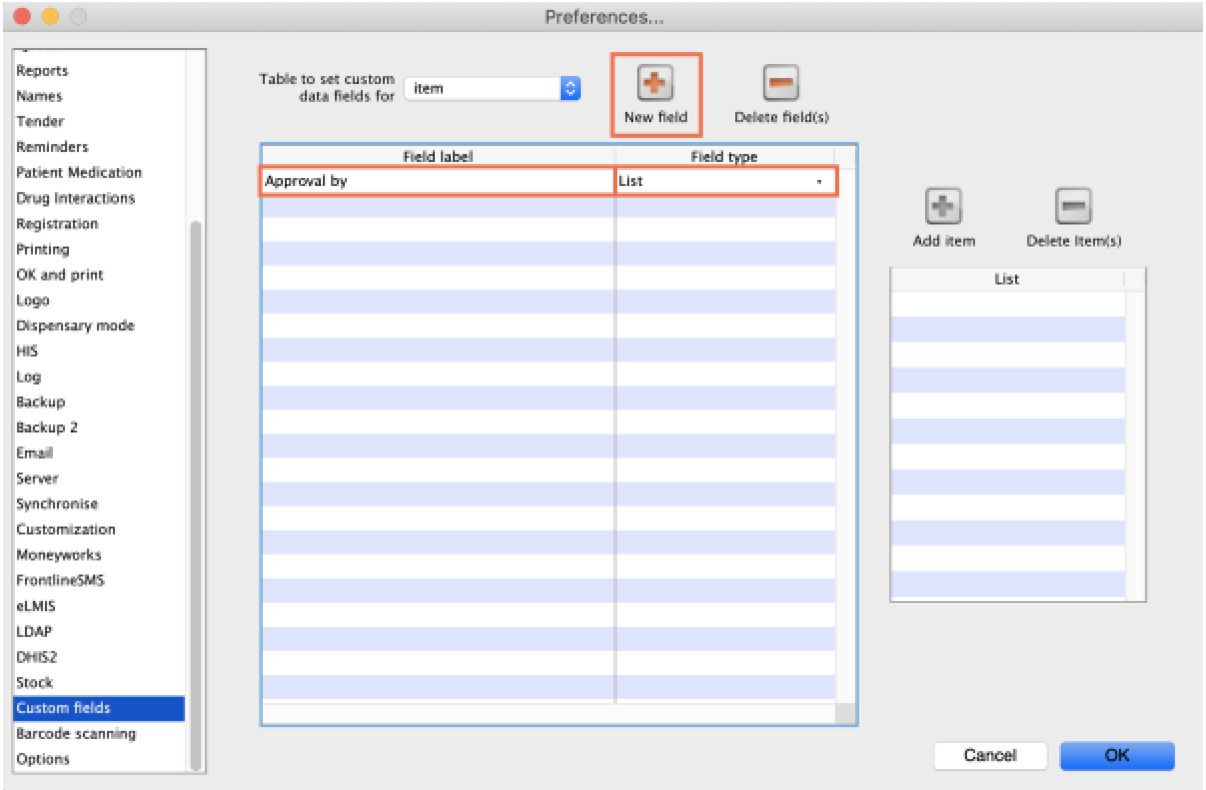


4. Click the **New Field** button.

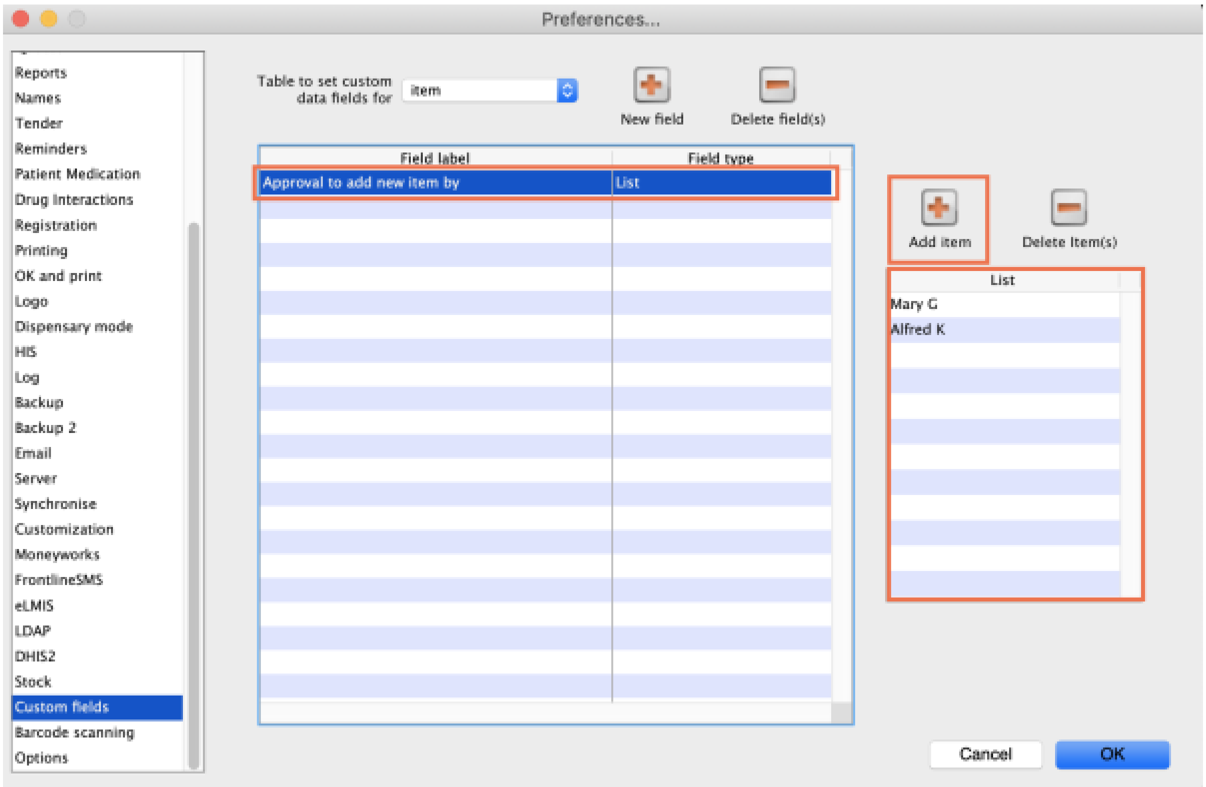
5. Click on the new line in the **Field Label** column to change the name of the custom field.

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)**.



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 a # custom field.

Supplier invoice

When creating a supplier invoice:

Click the **Custom Data** tab. In this example, we added a # custom field.

Store

When creating a store:

Click the **Custom Fields** tab. In this example, we added a # custom field.

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: