

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



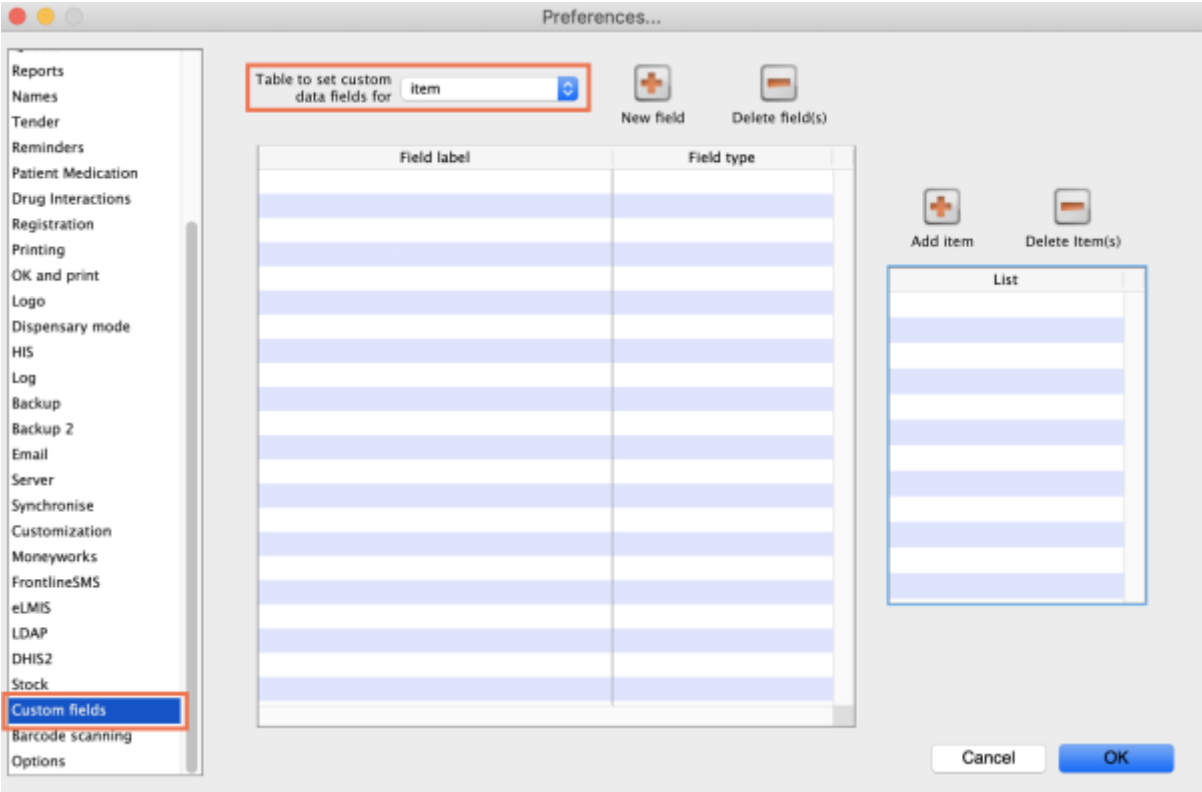
Only edit custom fields if you are confident with the information in this page and fully understand the content. Otherwise you could cause some things to stop working in your copy of mSupply! This is true for all settings, but please be especially careful with custom fields.

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.

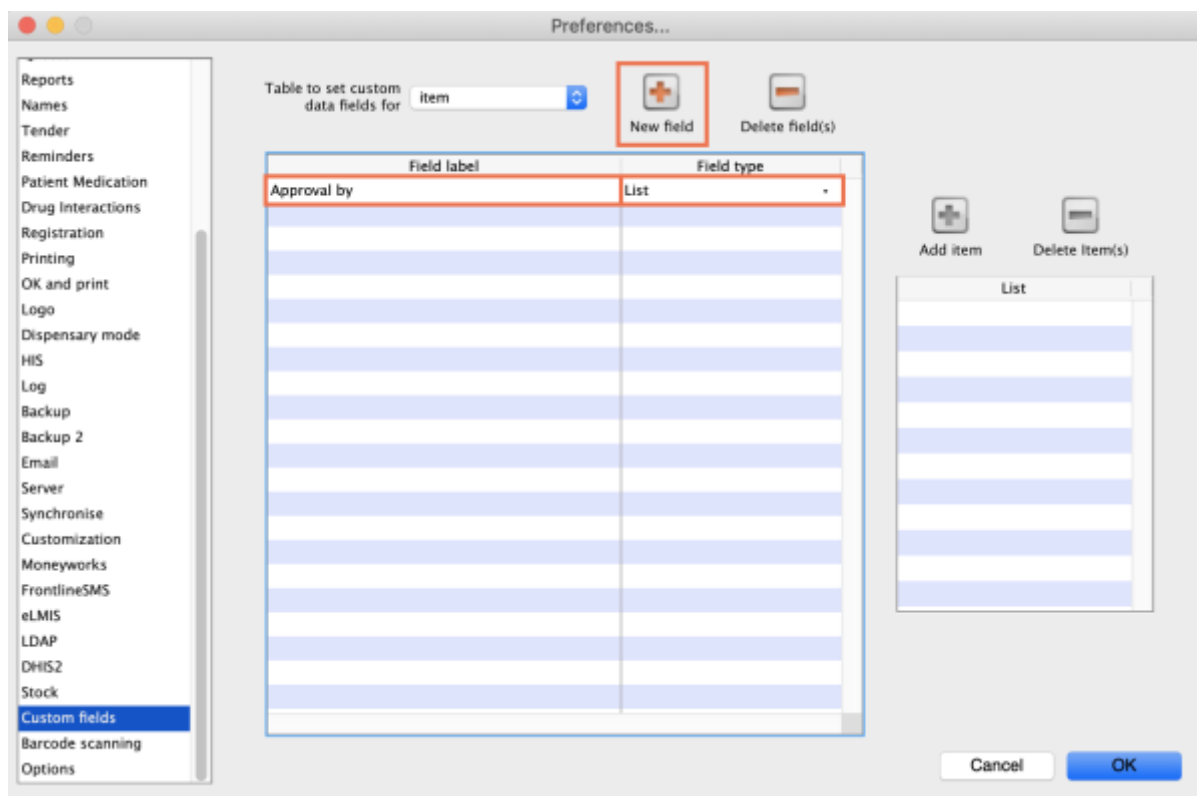


4. Click the **New Field** button.

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)**.



Using custom fields

Customer invoice

Click the **Custom Data** tab.

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

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

Delivery method

Truck

Ship

Plane

N/A - staff will collect

Field Type = Date

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.

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

Export batch: 0

☐ Finalise

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

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