

## 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)**.



**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 invoices

### 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.

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