# 15.11. 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.

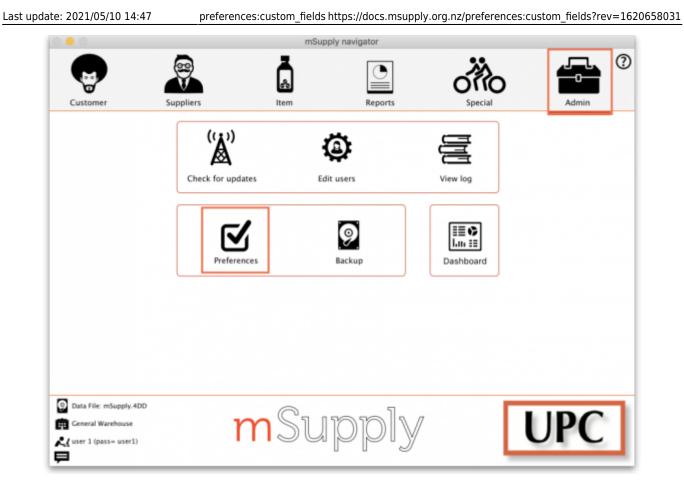
You can create custom fields in the following areas:

- Customer invoice
- Supplier invoice
- Store
- Requisition
- Item
- Item category
- Quote line
- Name (of customers, suppliers, prescribers etc.)
- User
- Purchase orders
- Transaction categories
- Item Category Level 1
- Transaction lines

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.

|                            | Prefer                   | ences                     |                         |
|----------------------------|--------------------------|---------------------------|-------------------------|
| Reports<br>Names<br>Tender | Table to set custom item | New field Delete field(s) |                         |
| Reminders                  | Field label              | Field type                |                         |
| Patient Medication         |                          |                           |                         |
| Drug Interactions          |                          |                           | ÷ —                     |
| Registration               |                          |                           | Add item Delete Item(s) |
| Printing                   |                          |                           | Had item Derete item(a) |
| OK and print               |                          |                           | List                    |
| Logo                       |                          |                           |                         |
| Dispensary mode            |                          |                           |                         |
| HIS                        |                          |                           |                         |
| Log                        |                          |                           |                         |
| Backup                     |                          |                           |                         |
| Backup 2                   |                          |                           |                         |
| Email                      |                          |                           |                         |
| Server                     |                          |                           |                         |
| Synchronise                |                          |                           |                         |
| Customization              |                          |                           |                         |
| Moneyworks                 |                          |                           |                         |
| FrontlineSMS               |                          |                           |                         |
| eLMIS                      |                          |                           |                         |
| LDAP                       |                          |                           |                         |
| DHI52                      |                          |                           |                         |
| Stock                      |                          |                           |                         |
| Custom fields              |                          |                           |                         |
| Barcode scanning           |                          |                           |                         |
| Options                    |                          |                           | Cancel OK               |

#### 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.

|                    | Prefere                               | nces                      |                         |
|--------------------|---------------------------------------|---------------------------|-------------------------|
| Names<br>Tender    | Table to set custom item 3            | New field Delete field(s) |                         |
| Reminders          | Field label                           | Field type                |                         |
| Patient Medication | Approval by                           | List -                    |                         |
| Drug Interactions  |                                       |                           | ÷ =                     |
| Registration       |                                       |                           | Add item Delete Item(s) |
| Printing           |                                       |                           |                         |
| OK and print       |                                       |                           | List                    |
| Logo               |                                       |                           |                         |
| Dispensary mode    |                                       |                           |                         |
| HIS                |                                       |                           |                         |
| Log                |                                       |                           |                         |
| Backup             |                                       |                           |                         |
| Backup 2           |                                       |                           |                         |
| Email              |                                       |                           |                         |
| Server             |                                       |                           |                         |
| Synchronise        |                                       |                           |                         |
| Customization      |                                       |                           |                         |
| Moneyworks         |                                       |                           |                         |
| FrontlineSMS       |                                       |                           |                         |
| eLMIS              |                                       |                           |                         |
| LDAP               |                                       |                           |                         |
| DHI52              |                                       |                           |                         |
| Stock              |                                       |                           |                         |
| Custom fields      |                                       |                           |                         |
| Barcode scanning   | · · · · · · · · · · · · · · · · · · · |                           |                         |
| Options            |                                       |                           | Cancel OK               |

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 it in the list and click **Delete Item(s)**.

| • • •              | F                                     | Preferences |                 |              |              |
|--------------------|---------------------------------------|-------------|-----------------|--------------|--------------|
|                    |                                       |             |                 |              |              |
| Reports            | Table to set custom                   | •           |                 |              |              |
| Names              | data fields for                       |             |                 |              |              |
| Tender             |                                       | New field   | Delete field(s) |              |              |
| Reminders          | Field label                           | Field       | type            |              |              |
| Patient Medication | Approval to add new item by           | List        |                 |              |              |
| Drug Interactions  |                                       |             |                 | <b>•</b>     |              |
| Registration       |                                       |             |                 |              |              |
| Printing           |                                       |             |                 | Add item Del | lete Item(s) |
| OK and print       |                                       |             |                 | List         |              |
| Logo               |                                       |             |                 | Mary G       |              |
| Dispensary mode    |                                       |             |                 | Alfred K     |              |
| HIS                |                                       |             |                 |              |              |
| Log                |                                       |             |                 |              |              |
| Backup             |                                       |             |                 |              |              |
| Backup 2           |                                       |             |                 |              |              |
| Email              |                                       |             |                 |              |              |
| Server             |                                       |             |                 |              |              |
| Synchronise        |                                       |             |                 |              |              |
| Customization      |                                       |             |                 |              |              |
| Moneyworks         |                                       |             |                 |              |              |
| FrontlineSMS       |                                       |             |                 |              |              |
| eLMIS              |                                       |             |                 |              |              |
| LDAP               |                                       |             |                 |              |              |
| DHI52              |                                       |             |                 |              |              |
| Stock              |                                       |             |                 |              |              |
| Custom fields      |                                       |             |                 |              |              |
| Barcode scanning   | · · · · · · · · · · · · · · · · · · · |             |                 |              |              |
| Options            |                                       |             |                 | Cancel       | ОК           |

#### 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 how custom fields appear after they are created.

### **Customer invoices**

#### 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.

2025/06/28 00:11

5/6

| 0                               |                      | Custom            | er invoice         |                 |                      |                   |
|---------------------------------|----------------------|-------------------|--------------------|-----------------|----------------------|-------------------|
| Name Merlo Health Centre        | 1                    | Confirm date : 00 | /00/00             |                 | Colour               | Black             |
| Their ref 8459                  | MER                  |                   |                    |                 | Invoice : 0          |                   |
| Comment                         |                      | Category          | ione               | 0               | Entry date : 24/     | 10/19             |
|                                 |                      |                   |                    |                 | Goods received ID: 0 |                   |
|                                 |                      |                   |                    |                 | Status : nw          |                   |
|                                 |                      |                   |                    |                 | Entered by : use     | r 1 (pass= user1) |
|                                 |                      |                   |                    |                 | Store : Ger          | ieral Warehouse   |
|                                 | General Summary by I | tem Summary by Ba | tch Transport deta | ails Log Custom | data                 |                   |
|                                 |                      |                   |                    |                 |                      |                   |
| Delivery organised for 21/11/19 |                      | 📕 Field Ty        | pe = Date          |                 |                      |                   |
| Ship<br>Plane<br>N/A - sta      | ff will collect      | Field Ty          | rpe = List         |                 |                      |                   |
|                                 |                      |                   |                    |                 | Delate a             | <b>0</b> 1        |
|                                 |                      |                   |                    | 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                          | r Invoice               |                     |                      |
|------------------------------------|-----------------------------------|-------------------------|---------------------|----------------------|
| Name Pulo World Medicine Suppliers | 1                                 | Confirm date : 00/00/00 | Colour              | Black                |
| Their ref 4563                     | pulo                              |                         | Invoice number :    | 0                    |
| Comment                            | Cat                               | tegary None             | 2                   | 24/10/2019           |
|                                    |                                   |                         | Status :            |                      |
|                                    |                                   |                         | Goods received ID : |                      |
|                                    |                                   |                         | Purchase Order ID : |                      |
|                                    |                                   |                         | Requisition ID :    |                      |
|                                    |                                   |                         |                     | user 1 (pass= user1) |
|                                    |                                   |                         |                     | General Warehouse    |
|                                    | General Summary by Item Summary b | by Batch Price Log Cuv  | om eata             |                      |
| Payment made                       | Field Type = Boolean              |                         |                     |                      |
| Reason if not yet paid             | Field Type = Te                   | avt                     |                     |                      |
| Reason in not yet parts            | Field Type - It                   | FAL                     |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
|                                    |                                   |                         |                     |                      |
| Hold Export batch: 0               |                                   |                         |                     |                      |
| Finalise Margin: 0.00              |                                   |                         | OK & Next Delete    | ок 🛛 🖶               |

#### Stores

#### When creating a store:

Click the **Custom Fields** tab.

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

| • • •               |                             | New store                      |  |
|---------------------|-----------------------------|--------------------------------|--|
| Merio Health Centre |                             | ogo Custom fields Master lists |  |
|                     | Field label                 | Field value                    |  |
|                     | Number of staff at facility | 2                              |  |
|                     | Field Typ                   | e = Number                     |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             |                                |  |
|                     |                             | Cancel OK                      |  |

Previous: 16.10. Options (standard reasons) | | Next: 17. Data Import and Export

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

Permanent link: https://docs.msupply.org.nz/preferences:custom\_fields?rev=1620658031

Last update: 2021/05/10 14:47