

## Create a Custom Field

Create a custom field at the line item or document level. Configurations can be found in the Administrator panel under *Documents -> Custom Fields*. All existing custom fields can be updated, deleted or inactivated from this view.

## **PROCESS:**

To get started 'Create a Custom Field'. The following steps will require review or

completion. Global Custom Fields can be created and added to Vroozi transactional documents (Requisition, Purchase Order, Invoice, Goods Receipt, Goods Return).

To set up a Custom field the following steps will require review or completion.

Administrator	~			V	ROZI°			
📜 Shopper View		Cust	tom Fields					
Dashboard								
Company	~	Q	Search by Field Name, Display	Vame, Type, Status and Created Date				
> API Integration	~		Field Name	Display Name	Туре	Created Date	Status	Action
Master Data			Color - Laptop	Color - Laptop	List	05/12/2020	Active	Ē
Master Data	Ň		Color Oct	Color Oct	List	03/05/2019	Active	<u>ا</u>
Documents	^		Color_Oct	Color_Oct	List	03/05/2019	Active	<b></b>
Types and Number	rs	0	Comment	Comment	Fixed	02/19/2020	Active	<u>ش</u>
Settings		0	Contact	Contact	Fixed	02/15/2017	Active	<b></b>
Custom Labels			Country of Origin	Country of Origin	Fixed	10/08/2019	Active	Ē
Ownership Change	e	0	Customize your shirt	Customize your shirt	Input Field (Small)	09/30/2016	Inactive	ŵ
Accounts Payable	~		DIAMETER	DIAMETER	Fixed	01/09/2019	Active	<b></b>
			Delivery Window	Delivery Window	Fixed	10/08/2019	Active	Ŵ
Supplier Portal	×		EXTENDED TO PLANT	EXTENDED TO PLANT	Fixed	01/09/2019	Active	<b></b>
Reports		31.	40 of 288					
L Document Flow			Activate 🗶 Deactivate	Create a Custom Field			First 2 3 4	5 6 Last
Approve Requests								

- 1. Complete the name & type of custom field.
- 2. Select 'Type'. See last page for details on 'List' type.



- 3. Decide when and how the Custom View is seen.
  - **'Required':** Set a Requirement for the Custom field based on Supplier or Category(s). Once toggled on, select from existing master data.

Required ⑦ On	Post Filter ⑦ Off
Searchable (?)	Include in PO? ⑦
Off	Off
Required for the following Suppliers:	
Grainger - Grainger ×	
Required for the following Categories:	

Create a Custom	Field
Field Name *	0
Capacity	
Display Name	
List	
Type* 🙎	
List	$\sim$ $\rightarrow$
Placeholder Text	(?
Select Capacity	
Help Text	
Max weight capacity	
Required ⑦	Post Filter
Off 3	Off
Searchable 🕐	Include in PO? ⑦
Off	Off



**4. 'Associate Custom Field to Line Items'**: Make the custom field visible on *ALL* line items.

All Line Items		
Off		
Associate Custom F	ield to Documents ⑦	5
Purchase Request	Purchase Order	Goods Receipt
Off	Off	Off
Goods Receipt Return	Invoice	
Off	Off	
	Cancel	ubmit
	Cancel St	ubmit

5. 'Associate Custom Field to Documents': Select which documents you want to apply the custom field requirements/settings to.

Alternatively, custom fields not associated at configuration can be associated with a particular document type by selecting 'Associate Custom Field' within that document's listed custom fields.

chase Order					
Field Name	Display Name	Туре	Created Date	Status	Action
Buyer Code	Buyer Code	Input Field (Small)	10/08/2019	Active	ŵ
Project	Project number	Input Field (Small)	06/01/2020	Active	Ŵ
Shipping Address 1	Shipping Address 1	Input Field (Large)	09/30/2016	Inactive	Ē
VIN No	VIN No	Input Field (Small)	09/11/2017	Inactive	ŵ
-A of A ssociate Custom Fields					

## Custom Field List Default

If List is selected as a Custom Field Type, Administrators may elect to designate a default List type for that particular custom field.

Click the arrow displayed to the right of the Custom Field 'List' Type selection.

Enter List Values. Once completed select the Default Value at the top of the screen. Once selection has been entered. Click 'Submit'.

Any Custom fields associated with a document type will also then display within that document types sub-classification.

÷		List Options		
#	Default Value	Gold Silver Matte Black Frice Moamer Dynamic Part Number		
1	Gold	50		t
2	Silver	100	San P	t
3	Matte Black	200		t