

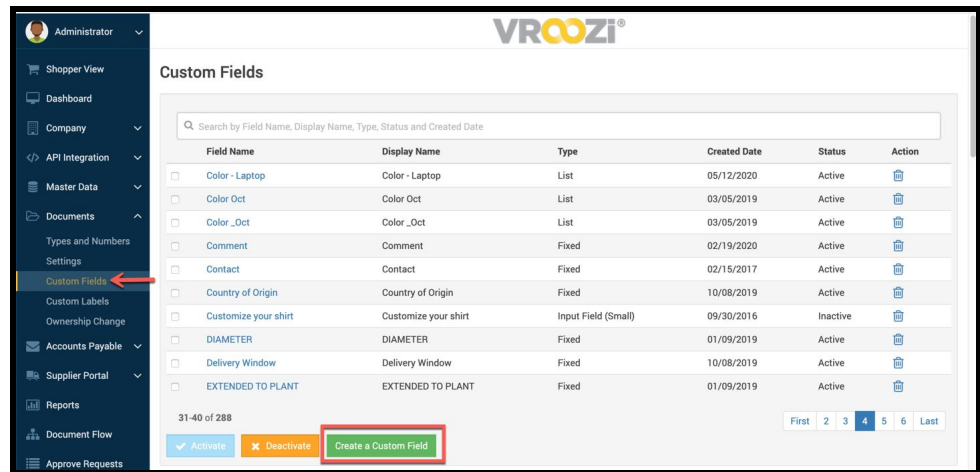
## Create a Custom Field

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.

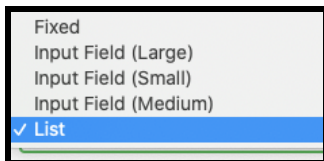
### PROCESS:

To get started 'Create a Custom Field'. The following steps will require review or completion. Global Custom Fields can be created and added to Vroozii transactional documents (Requisition, Purchase Order, Invoice, Goods Receipt, Goods Return).

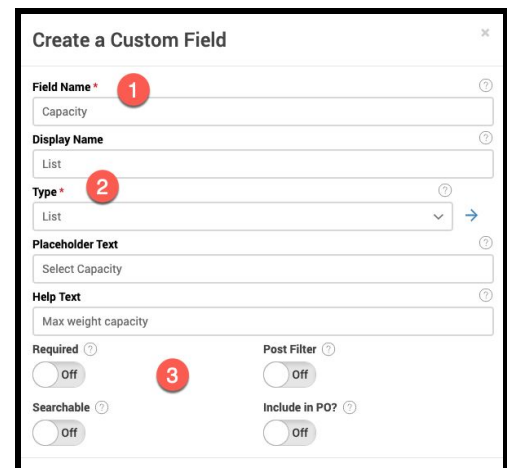
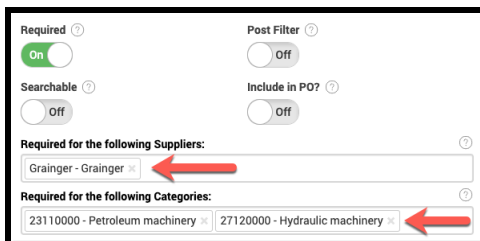
To set up a Custom field the following steps will require review or completion.



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.



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

- 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.

Field Name	Display Name	Type	Created Date	Status	Action
Buyer Code	Buyer Code	Input Field (Small)	10/08/2019	Active	
Project	Project number	Input Field (Small)	06/01/2020	Active	
Shipping Address 1	Shipping Address 1	Input Field (Large)	09/30/2016	Inactive	
VIN No	VIN No	Input Field (Small)	09/11/2017	Inactive	

### 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.