

How to Create Custom Fields

The new version of Magaya software (7.0) gives you the ability to add custom fields of different types to any transaction and use them in templates, lists, reports, combo boxes (dropdown menus), filters, when transmitting or converting transactions, export/import, and more.

For example if you ship vehicles, you may need to track information about the vehicles and generate a report. Now with custom fields, you can add any field you need and answer questions about the shipments such as

- Is the title with the vehicle?
- Are the keys in the vehicle?
- Does the car have gas?
- What is the color of the vehicle?

You can create different types of fields:

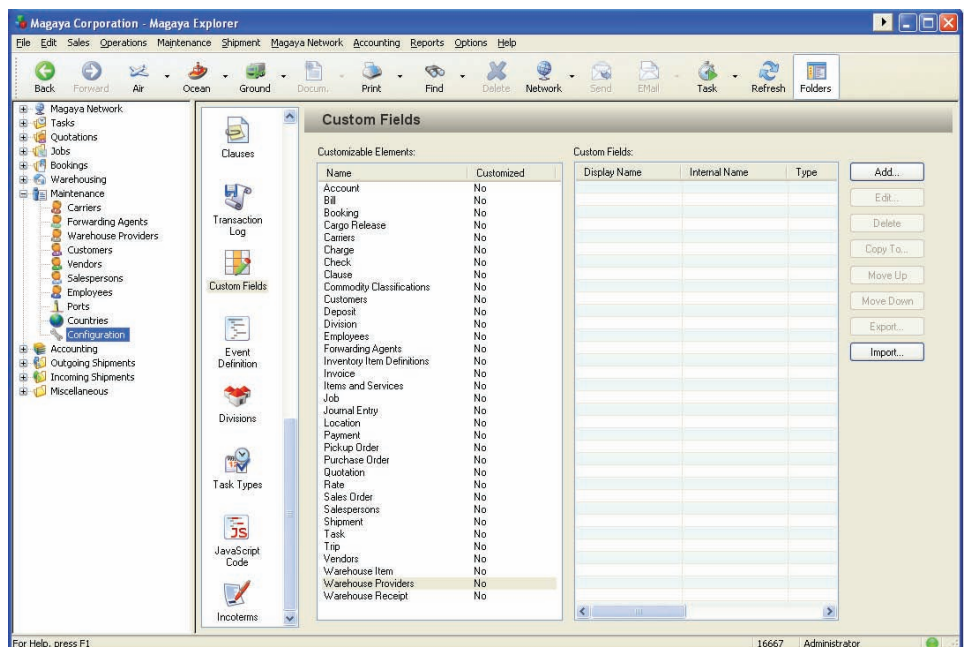
- Dropdown lists of choices (choices you set or choose from your existing list of entities such as customers, carriers, vendors, etc)
- Text fields that can be filled in (you set the character limit)
- "Yes or No" fields
- Numeric fields and currency fields (whole numbers or include decimal places)
- Date and/or time fields

When you add a custom field, it becomes available as a new tab in the transaction.

Other options include the ability to add the custom field as a column in any list in Magaya Explorer. You can also make the custom field visible for employees internally but not visible to customers.

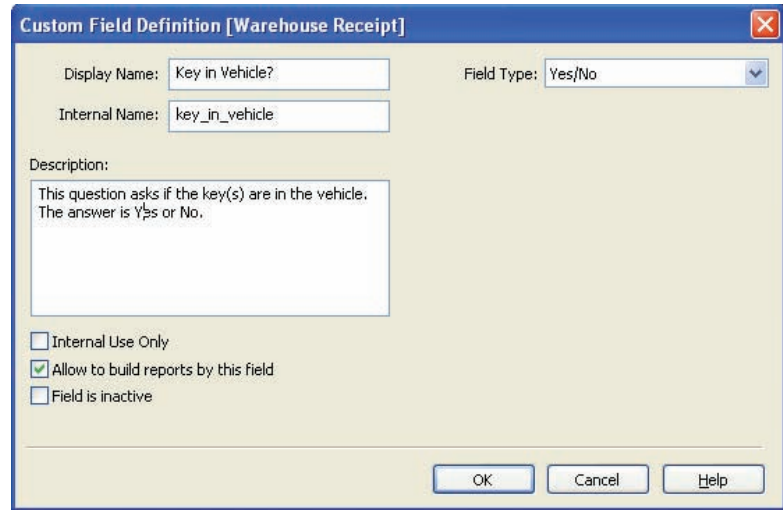
Step-by-Step Procedure

1. Go to the Maintenance folder (or the Options menu on the top toolbar) and click on Configuration.
2. Select Custom Fields from the menu.



3. In the list of Customizable Elements, select the element you want to customize such as Cargo Release, Invoice, or Warehouse Receipt. For this example we will select Warehouse Receipt and create a custom field for the following: Are the keys with the vehicle?

4. Click the Add button to create a custom field for our question. A dialog box opens:



The screenshot shows a dialog box titled "Custom Field Definition [Warehouse Receipt]". It contains the following fields and options:

- Display Name: Key in Vehicle?
- Field Type: Yes/No
- Internal Name: key_in_vehicle
- Description: This question asks if the key(s) are in the vehicle. The answer is Yes or No.
- Internal Use Only:
- Allow to build reports by this field:
- Field is inactive:
- Buttons: OK, Cancel, Help

5. Enter a Display Name. Let's type the Display Name as "Keys in Vehicle?" This is the name that will appear in the reports and in transactions. (The Internal Name is assigned by the system.)

6. Enter a description (optional). This will not display on the transaction. This will explain when and why this question is used.

7. Change the maximum length (optional).

8. Select what type of field you want. A dialog box opens, displaying different options depending on which type of field you choose. These are the options:

- **Text** will allow text to be entered in the field. You can set the maximum number of characters. The default is 100.
- **Decimal** will allow you to specify a number to a set amount of decimal places. Use the Precision dropdown to select the decimal places. The default is two places.
- **Pick List** will create a dropdown list with choices you specify.
- **Yes/No** is used to answer yes or no questions.
- **Date** can display the date field. To include the time, check the box "Date and Time."
- **Money** will allow you to specify a currency amount. Use the Precision dropdown to select the decimal places. The default is two places.
- **Lookup** will allow the user to select from a dropdown list of the entities you set such as Customers, Forwarding Agents, Carriers, etc.

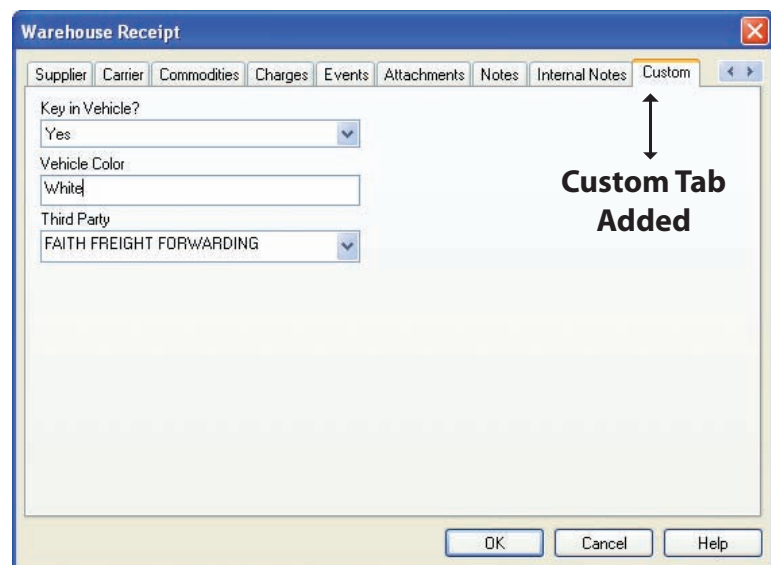
9. Select Yes/No for this example.

10. Check the box to "Allow to build reports by this field" to allow this custom field to be available in reports in Magaya software. Other options are:

- If you no longer need a field, there are two options: You can delete a custom field completely, or you keep it in your system but make it inactive. To deactivate a custom field, check the box "Field is Inactive".
- If you want to create a custom field for internal use only, check the box "Internal Use Only".

You can add as many custom fields as you need.

After you add a custom field, it becomes available as a new tab in the transaction. For this example, two more custom fields were added: one text box for the vehicle color, and one Lookup for the third party. Let's go to a Warehouse Receipt to see how the custom fields appear in the dialog box:



The information added into the Custom Fields will be automatically carried over to any other transactions you create from this Warehouse Receipt such as a shipment whenever the field exists.

Another new feature in the latest version of Magaya software is the ability to create custom documents with the Magaya Document Designer 2.0 to display these custom fields. Details will be coming in a future newsletter!