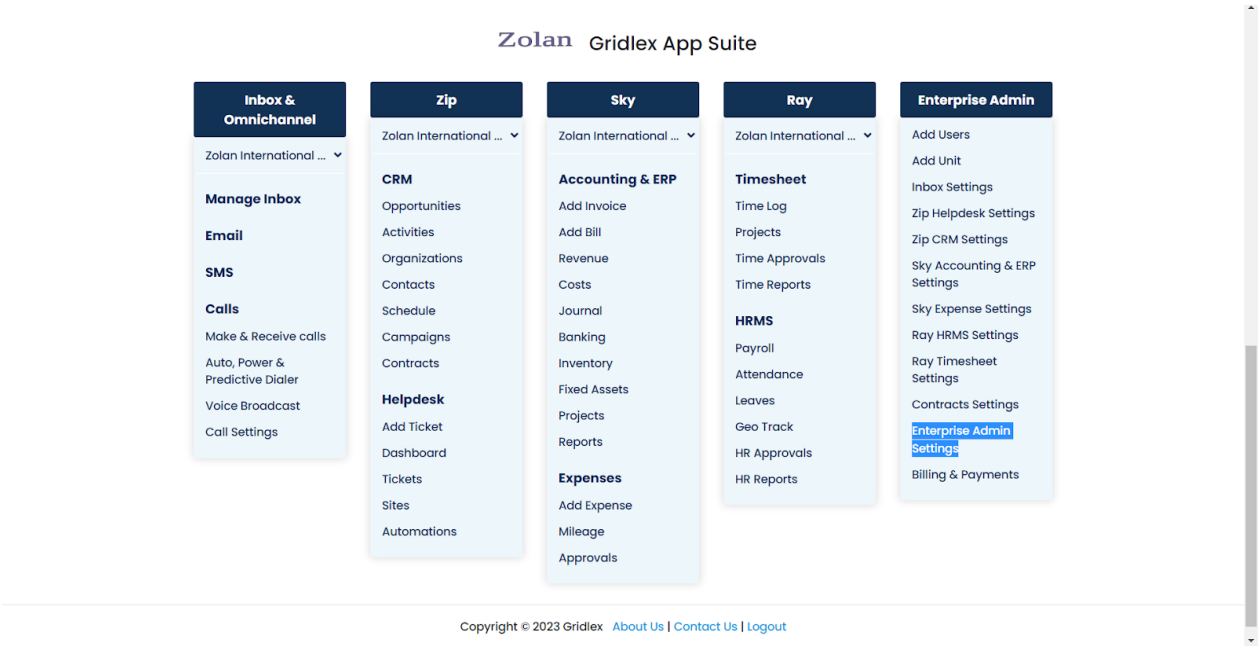
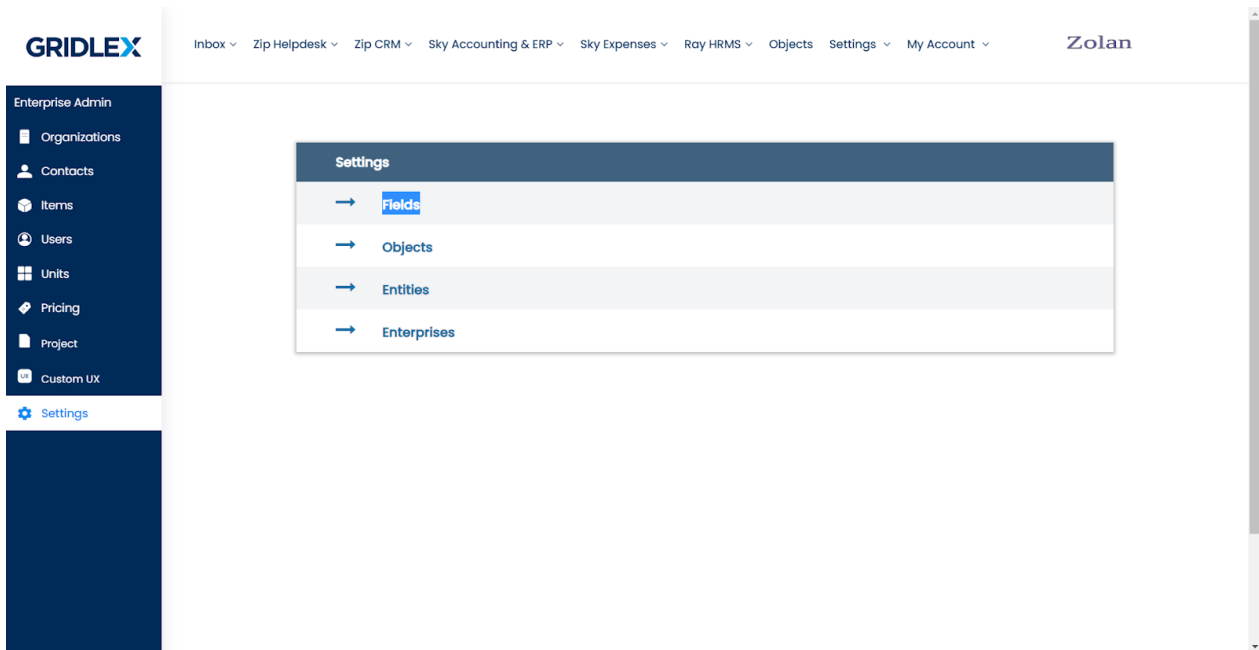


This guide will walk you through the process of creating a custom field in Gridlex App Suite in master data management.

Step 1: Log in to Gridlex App Suite and click on "Enterprise Admin Settings" located under the Enterprise Admin section.



Step 2: After clicking on "Enterprise Admin Settings," you will be redirected to a new page. On this page, find and click on the "Fields" option to proceed.



Step 3: Click on "Add/Edit Custom Field". Fill in the required details for your custom field, such as the field name, description, and select the field type (e.g., text, time, date, image, checkbox, etc.). Once you have entered the necessary information, click on the "Add" button to create the custom field. If you wish to add more fields at once, click on "Add Another Field" and repeat the process.

Step 4: If you want to restrict the visibility of these custom fields to specific units or disable the ability to edit and delete the field's values, check the corresponding boxes next to the respective units.

Units	Cannot View the field	Cannot Edit & Delete the value of field
	<input type="checkbox"/> Select all	<input type="checkbox"/> Select all
Zolan Ray	<input type="checkbox"/>	<input type="checkbox"/>
Zip Helpdesk Demo	<input type="checkbox"/>	<input type="checkbox"/>
Super Admin	<input type="checkbox"/>	<input type="checkbox"/>
Tejaswini	<input type="checkbox"/>	<input type="checkbox"/>
Sandeep	<input type="checkbox"/>	<input type="checkbox"/>
Dua Unit – Ray	<input type="checkbox"/>	<input type="checkbox"/>

Step 5: To view the entire list of custom fields you have created, click on "View Custom Fields" on the same page.

The screenshot displays the Gridlex App Suite interface. The top navigation bar includes the Gridlex logo and a series of menu items: Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, and My Account. The Zolan logo is positioned on the right. A left sidebar under 'Enterprise Admin' lists various system components: Organizations, Contacts, Items, Users, Units, Pricing, Project, Custom UX, and Settings. The main content area is titled 'View Standard Fields' and 'View Custom Fields' (highlighted in blue). Below this, there is a search bar and a table of custom fields. The table has five columns: Field Name, Field Block, Field Type, Action, and Standard or Custom. The fields listed are Category, Date, District, HH/Hospice, Insurance, Marketing Campaign Type, Patient Address, Patient Name, Primary Care Physician, and Referral Source. Each field has an 'Edit' link in the Action column. At the bottom of the table, there is a 'Show 10 entries' dropdown menu.

You have successfully created custom fields in Gridlex App Suite. Your custom fields will now be available for use in your application. If you encounter any difficulties or have any questions, feel free to reach out to Gridlex support at apps@gridlex.com.