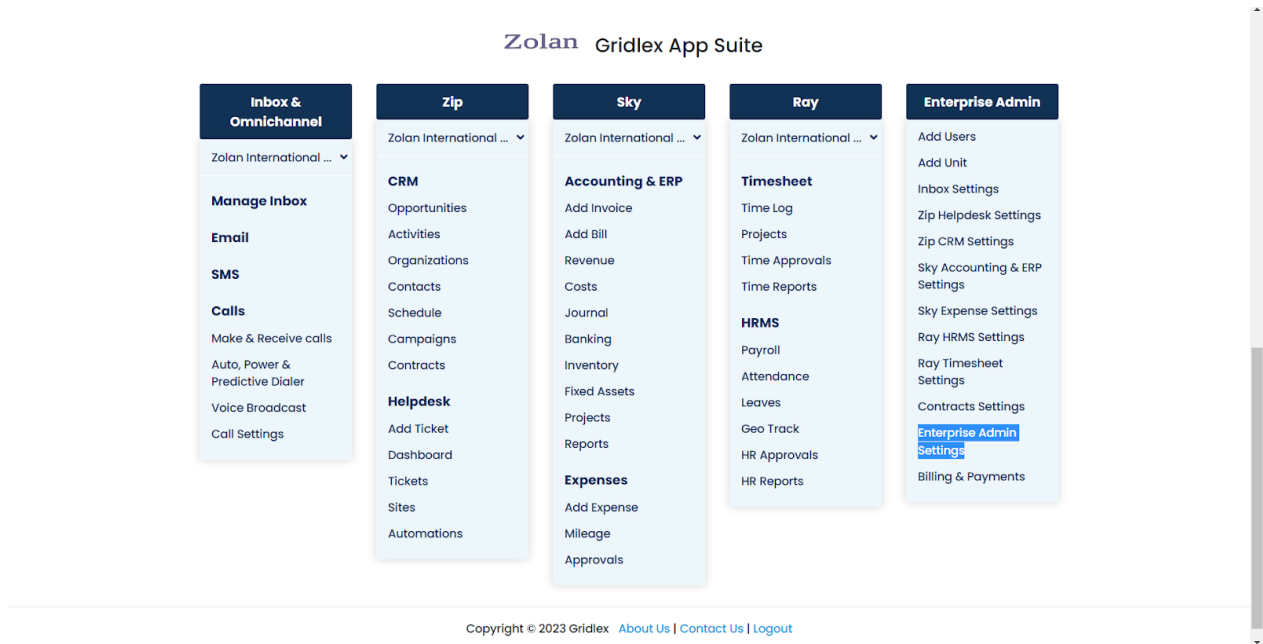
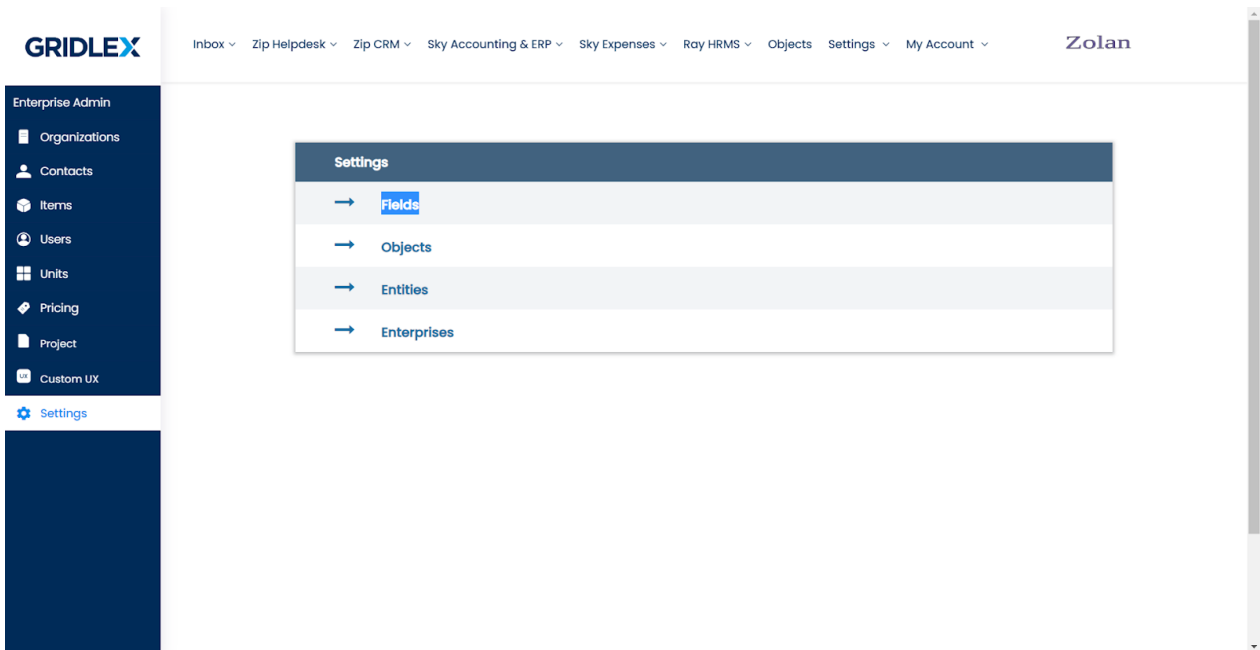


This guide will walk you through the process of creating a custom field in Gridlex App Suite in master data management.

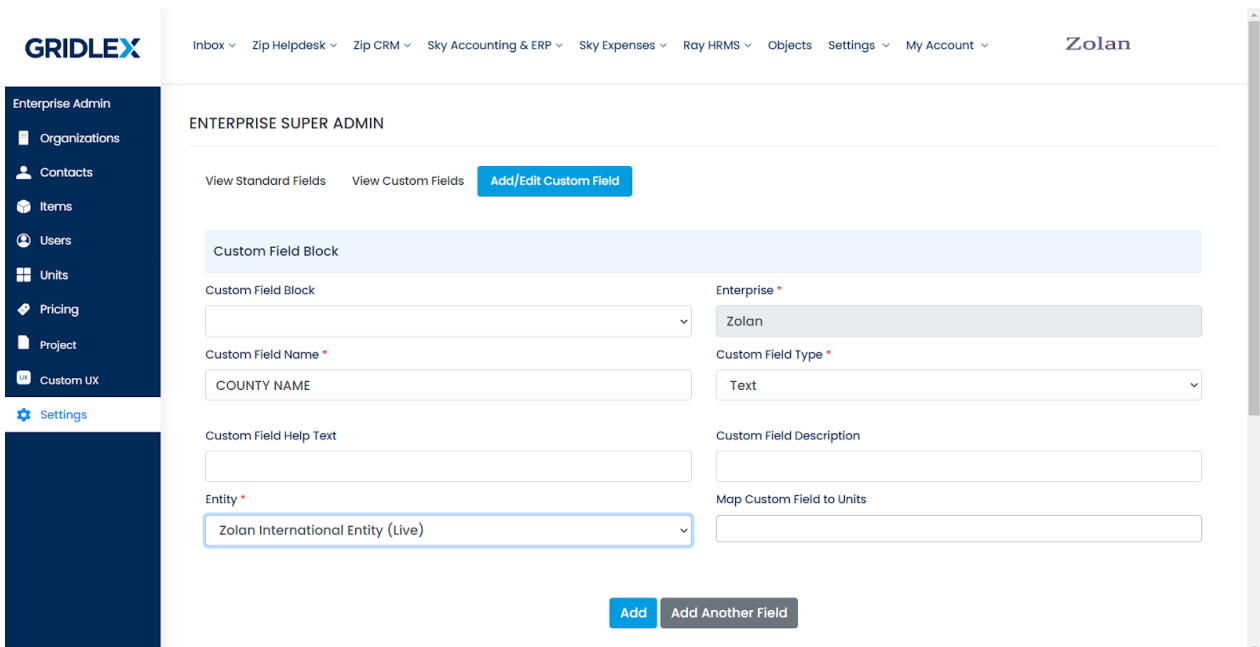
Step 1: Log in to Gridlex App Suite and click on "Enterprise Admin Settings" located under the Enterprise Admin section.



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<br><input type="checkbox"/> Select all | Cannot Edit & Delete the value of field<br><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 'View Custom Fields' interface in the Gridlex App Suite. The page features a top navigation bar with the Gridlex logo and various application modules (Inbox, Zip Helpdesk, Zip CRM, Sky Accounting & ERP, Sky Expenses, Ray HRMS, Objects, Settings, My Account) and the Zolan logo. A left sidebar provides navigation for Enterprise Admin, including Organizations, Contacts, Items, Users, Units, Pricing, Project, Custom UX, and Settings. The main content area shows a table of custom fields with columns for Field Name, Field Block, Field Type, Action, and Standard or Custom. The 'View Custom Fields' button is highlighted in blue. Below the table, there is a search bar and a 'Show 10 entries' indicator.

| Field Name              | Field Block | Field Type | Action | Standard or Custom |
|-------------------------|-------------|------------|--------|--------------------|
| Category                |             | Text       | Edit   | Custom Fields      |
| Date                    |             | Date       | Edit   | Custom Fields      |
| District                |             | Text       | Edit   | Custom Fields      |
| HH/Hospice              |             | Radio      | Edit   | Custom Fields      |
| Insurance               |             | Dropdown   | Edit   | Custom Fields      |
| Marketing Campaign Type |             | Dropdown   | Edit   | Custom Fields      |
| Patient Address         |             | Text       | Edit   | Custom Fields      |
| Patient Name            |             | Text       | Edit   | Custom Fields      |
| Primary Care Physician  |             | Text       | Edit   | Custom Fields      |
| Referral Source         |             | Text       | Edit   | Custom Fields      |

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](mailto:apps@gridlex.com).