Item Categories

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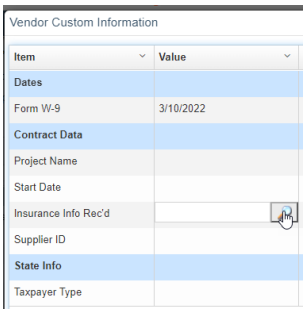
The option exists to add custom fields to various maintenance screens, such as Vendors, Payers, Accounts, Objects, etc. Any custom information fields can be edited and viewed on the (vendor, payer, account, object) maintenance screen, as well as included in a custom report. Click on the Custom Info button on any of those screens. Here's an example of a vendor screen.



Setup of Custom Information

Custom Information fields are added under the Settings menu. Once setup here, the custom fields are available on any vendor/payer, account, object maintenance screen. Select the view type. View Type Vendors applies to both AP vendors and AR payers. For object tracking, view types are specified by the object type.

Category: this allows various rows to be grouped under a category header (shown in blue above). Categories will be displayed in the order shown, but can be repositioned simply by clicking the category to be moved and using the up/down buttons.

- **Items:** Click to highlight a category and click Items to see the various custom fields within the selected category. (These would be the white rows in the example above.)

- **Data Codes:** option to add a defined selection of choices that apply to this Item. Note in the Insurance Info Rec'd row above, a search icon exists where a data code can be selected (Yes or No in this case).

Deleting a Category

If you wish to delete a category, you will not be able to delete a category that still has items in it. To delete a category delete all the items within it first, then delete the category.