

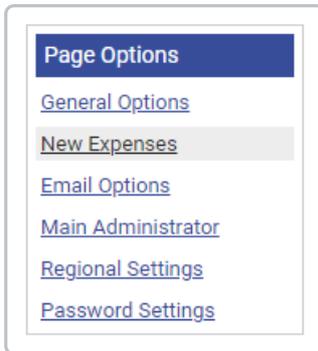
General Options - Field Settings

Last Modified on 10/11/2023 2:52 pm GMT

Permissions

You will require an Access Role with the following permissions:

- General Options
1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.
 2. Click **New Expenses** from the 'Page Options' menu.



3. From the 'General Options' menu, click **Field Settings**.

Tailoring
General Options

Field Settings Code Allocation Duty of Care Addresses & Distances Other Preferences

	Code ▲	Description	Display on item level	Display on cash items	Mandatory on cash items	Display on credit card items	Mandatory on credit card items	Display on purchase card items	Mandatory on purchase card items
	costcode	Cost Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	country	Country	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	currency	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	department	Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	from	From	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	organisation	Address Name / Company Visited	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	otherdetails	Other Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	projectcode	Project Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	reason	Reason	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	to	To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: Changing the settings on this page for Cost Codes, Project Codes and Departments will have no effect.

Each of the following can be renamed to display a different label by clicking  and then entering the new field label into the 'Display As' field.

Country	
Display on item level	-
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

Currency	
Display on item level	-
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page

Currency	
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

From	
Display on item level	Will display in the expense item specific details section (item details)
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

Organisation	
Display on item level	-
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page

Organisation	
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

Other Details	
Display on item level	Will display in the expense item specific details section (item details)
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

Reason	
Display on item level	Will display in the expense item specific details section (item details)
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page

Reason	
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

To	
Display on item level	Will display in the expense item specific details section (item details)
Display on cash items	Will make the field display on standard cash items (default)
Mandatory on cash items	Will make the field mandatory on standard cash items (default)
Display on credit card items	If expense is created or matched from a corporate card statement, this field will display on the Add/Edit Expense page
Mandatory on credit card items	If expense is created or matched from a corporate card statement, this field will be mandatory
Display on purchase card items	If expense is created or matched from a purchase card statement, this field will display on the Add/Edit Expense page
Mandatory on purchase card items	If expense is created or matched from a purchase card statement, this field will be mandatory

4. Click **Save** to confirm or **Cancel** to discard any changes and return to the Tailoring page.
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