

Custom Reporting Fields

Custom reporting fields enable users to capture, analyse, and report on data that isn't already included in our Contract Management module. Enhance your team's experience with VendorPanel by driving more informed decision-making and better insights into business performance.

Follow the simple steps below to enable Custom Reporting Fields.

Setting up questions

On the contracts and vendor settings form there is a new section called Custom Reporting Fields. Enable custom reporting fields" is off by default. It is advised that you create your questions before turning on this setting (which can be done by clicking the "View/Setup custom reporting fields" button).



Custom Reporting Fields

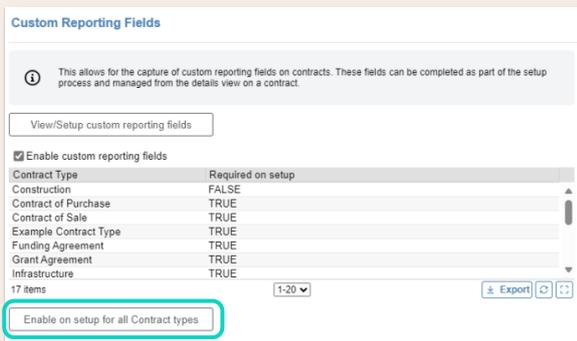
i This allows for the capture of custom reporting fields on contracts. These fields can be completed as part of the setup process and managed from the details view on a contract.

[View/Setup custom reporting fields](#)

Enable custom reporting fields

You have the option to mandate if the Custom Reporting Fields are on all contract types as part of setup or just on some contract types. All contracts will have custom reporting fields available once the contract is active.

Option 1: Enable setup for all Contract types



Custom Reporting Fields

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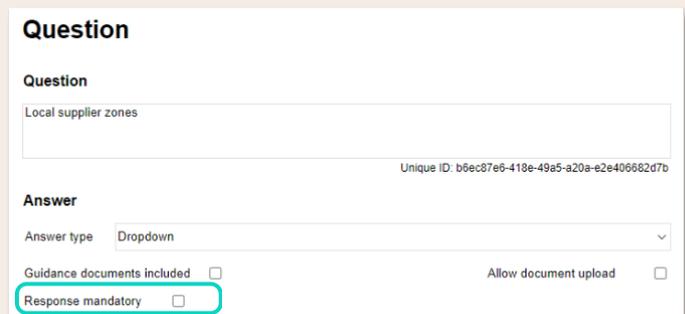
[View/Setup custom reporting fields](#)

Enable custom reporting fields

Contract Type	Required on setup
Construction	FALSE
Contract of Purchase	TRUE
Contract of Sale	TRUE
Example Contract Type	TRUE
Funding Agreement	TRUE
Grant Agreement	TRUE
Infrastructure	TRUE

17 items | 1-20 | [Export](#) [Refresh](#)

Enable on setup for all Contract types



Question

Question

Local supplier zones

Unique ID: b6ec87e6-418e-49a5-a20a-e2e406682d7b

Answer

Answer type: Dropdown

Guidance documents included

Response mandatory

Allow document upload

Option 2: Select a specific contract type. Under 'Other setup details' enable "Custom Reporting Fields"



Other setup details

You may specify which additional information is able to be added during the setup process.

Enabled Information type [Refresh List](#)

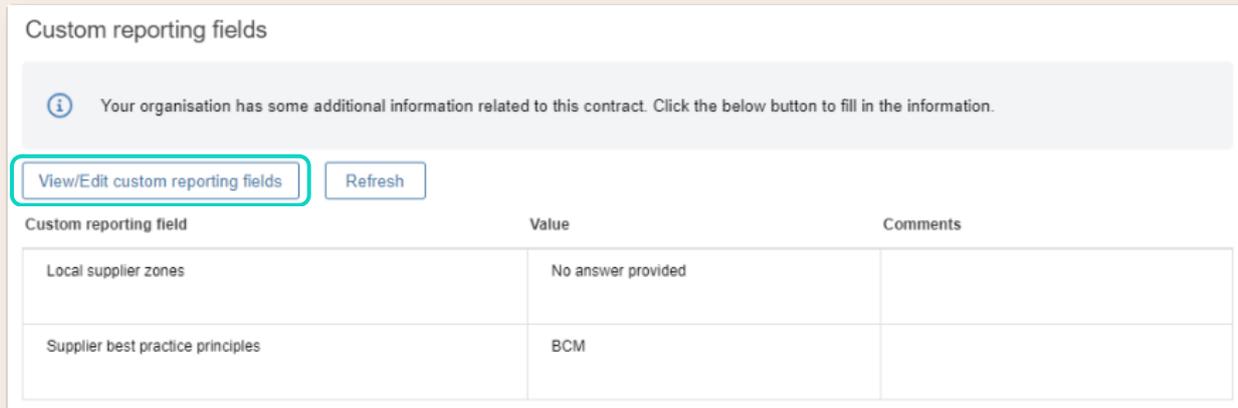
<input checked="" type="checkbox"/>	Custom Reporting Fields
<input type="checkbox"/>	Risks

PRO TIP:

On an individual field, if you enable "Response mandatory" then users will be required to fill it in before completing contract set up.

Entering Data

On contract setup there will be a new section called Custom Reporting Fields under the Other Details tab. On an individual contract at the bottom of the Details tab there will be a new section called Custom Reporting Fields.



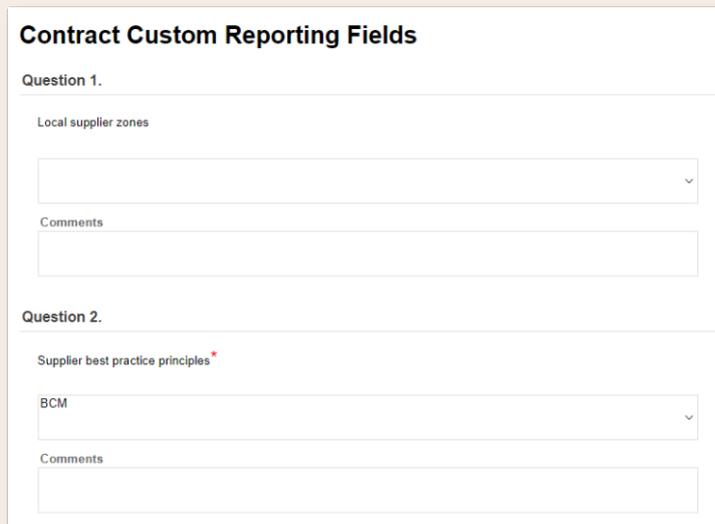
Custom reporting fields

i Your organisation has some additional information related to this contract. Click the below button to fill in the information.

View/Edit custom reporting fields Refresh

Custom reporting field	Value	Comments
Local supplier zones	No answer provided	
Supplier best practice principles	BCM	

The first time you enter data, clicking the "View/Edit Custom Reporting Fields" button will open up the custom fields popup. Once in the popup, you will be presented with all the questions you may need to answer (questions with a red asterisk* are mandatory).



Contract Custom Reporting Fields

Question 1.

Local supplier zones

Comments

Question 2.

Supplier best practice principles*

BCM

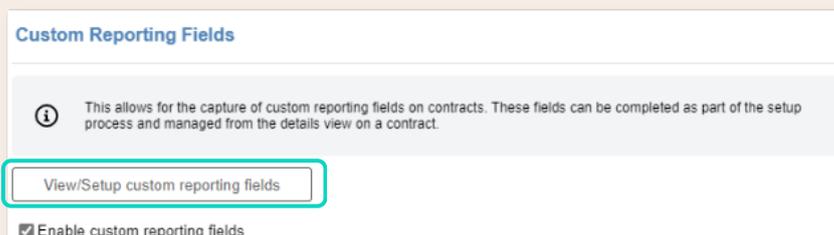
Comments

Once data is entered you will be able to view the answers without opening the pop-up.

Adding your Custom Reporting Fields to Tabular Reports

You can add these custom reporting fields to any of your existing tabular reports using the steps below:

- 1 In Contracts settings, there is a new section called Custom Reporting Fields. Click on 'View/Setup custom reporting fields'.



Custom Reporting Fields

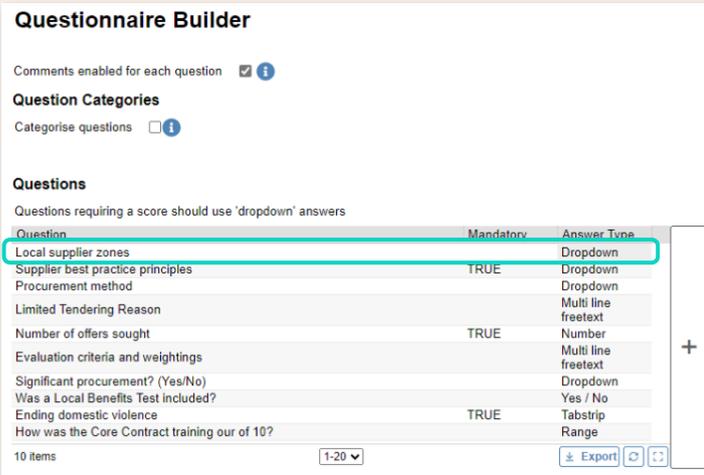
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View/Setup custom reporting fields

Enable custom reporting fields

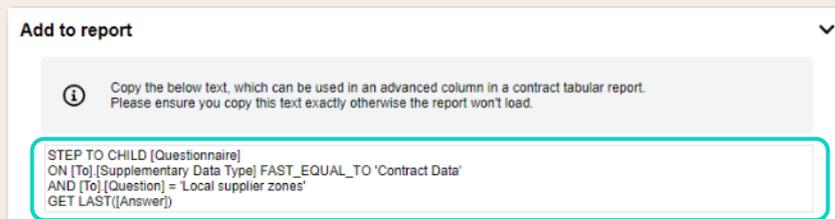
2

In Questionnaire Builder, open the question you want to add to your tabular report.



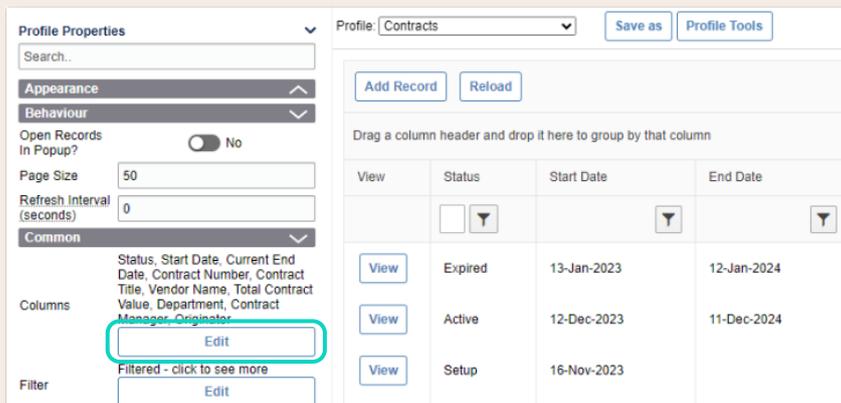
3

Open Add to report section and copy the 'code'.



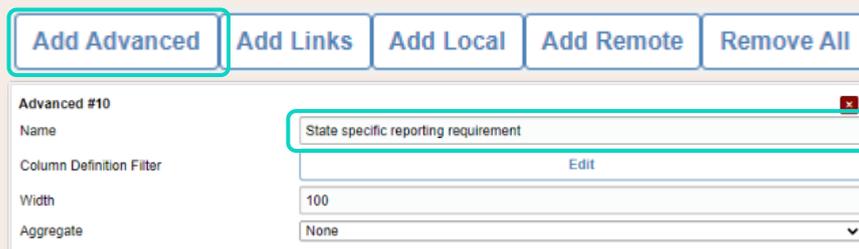
4

Go to the tabular report you want to edit and click edit under columns.

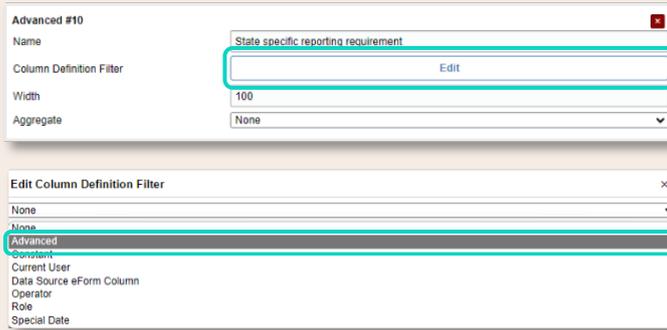


5

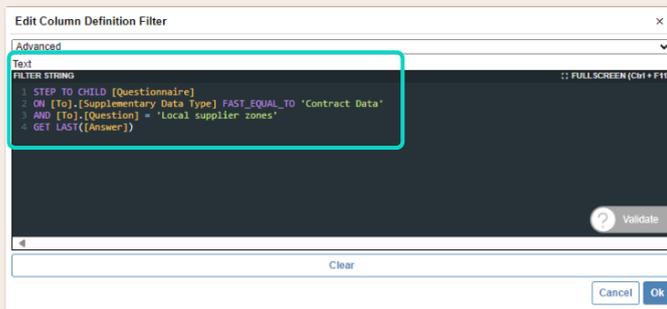
Click 'Add Advanced' to add a new column and give the column a new name.



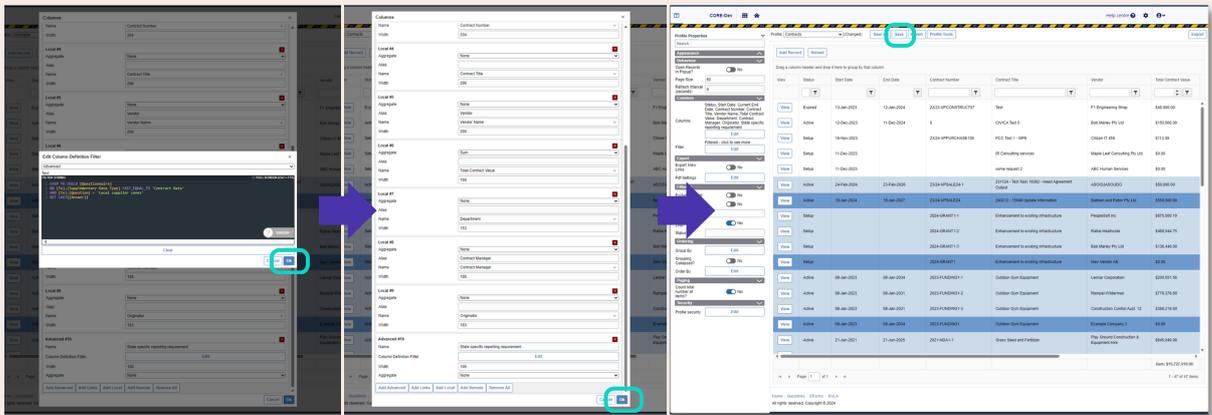
6 Click on Edit and Select Advanced.



7 Paste in “code.”



8 To finalise your change, select ‘Ok’ to get back to the dashboard where you will select ‘Save’.



Now that you’ve created your Custom Reporting Fields and presented your Tabular Reports you will enhance your team’s experience with VendorPanel by driving more informed decision-making and better insights into business performance.

**Want to learn more about
Custom Reporting Fields?
Get in touch today!**

