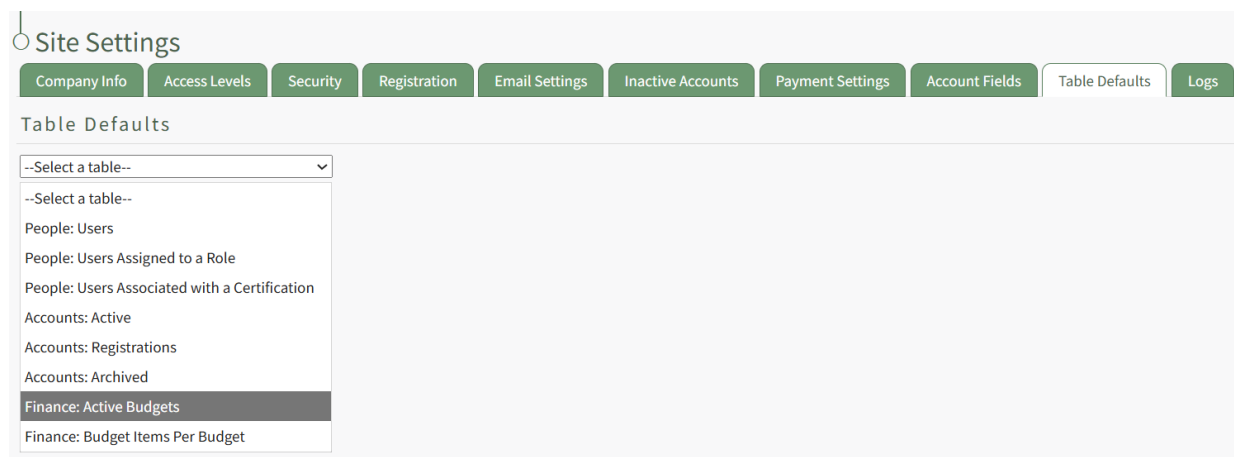


Customizable Tables in the Finance Module

There are two tables in the Finance Module than can be customized for your organization's specific needs.

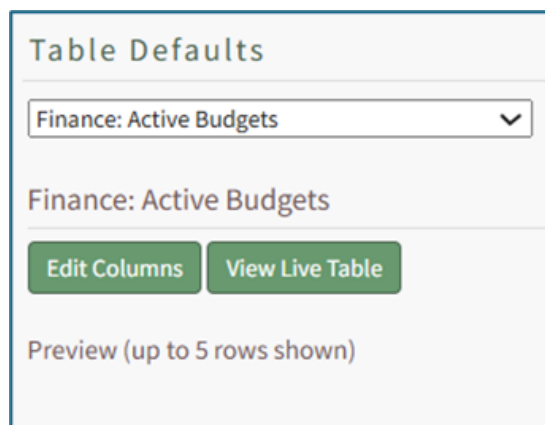


The Active Budgets Table (on the Active Tab of the Budgets Page of the Finance Module), the Budget Items per Budget Table (on a specific budget's Details Page) are customizable.

How To: Edit the Finance Module Active Budgets Table

To edit the Active Budgets Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Finance: Active Budget” from the dropdown menu.



Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: account, name, most recent activity, outstanding items, attachments, pending approvals, total budget, amount used, amount remaining, actions, description, system notes, username, email, first name, last name, phone, Address 1, and Address 2, employee ID and any customized account fields.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.

Site Settings

Company Info

Access Levels

Security

Registration

Email Settings

Inactive Accounts

Payment Settings

Account Fields

Table Defaults

Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
≡ Drag Me	Employee ID	No	Edit Delete
≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.

Add Field
X

Label *

Type *
Text
▼

☐ Allow multiple values

☐ Required

☐ Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save
Cancel

Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

Click "Cancel" to return to the Table Defaults Tab without making any changes.

Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

How To: Edit the Finance Module Budget Items Per Budget Table

To edit the Budget Items per Budget Table in the Finance Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Finance: Budget Items Per Budget” from the dropdown menu.

Table Defaults

Finance: Budget Items Per Budget ▼

Finance: Budget Items Per Budget

Edit Columns View Live Table

Preview (up to 5 rows shown)

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: item name, date, invoice number, attachment(s), amount, remaining funds, notes, approval status, approve / reject, paid, actions, username, email, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

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Site Settings

Company Info Access Levels Security Registration Email Settings Inactive Accounts Payment Settings Account Fields Table Defaults Logs

System User Account Information Fields

Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

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≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
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Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

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Select the "Save" button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the "View Live Table" button to be directed to the live table in the Finance Module.

Customizable user account information fields can be created and utilized in the tables as needed.

How To: Add a Custom / Additional User Account Information Field

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Email Settings

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First Name	No	Permissions
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Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

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≡ Drag Me	Address 1	No	Edit Delete
≡ Drag Me	Address 2	No	Edit Delete
≡ Drag Me	Phone	No	Edit Delete
≡ Drag Me	Supplier	No	Edit Delete

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Add Field

X

Label *

Type *

Text

▼

☐

Allow multiple values

☐

Required

☐

Sensitive field

Accounts Module Level	View Own	View Other	Edit Own	Edit Other
Admin	☒	☒	☒	☒
Supervisor	☒	☒	☒	☒
Employee	☒	☐	☒	☐
Observer	☒	☒	☐	☐
Logged out user	☒	☒	☒	☒

Save

Cancel

Input the label for the field.

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Use the Drag Me icon to drag and drop the field into your desired position of choice.

Revision #1

Created 2026-01-28 21:59:15 UTC by Mitzi Orkus

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