



REQUIRED CONTRACT CUSTOM FIELDS

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Overview

In Lease, the administrator manages custom fields.

There are two kinds of custom fields in Lease:

- Entity custom field
- Contract custom field

The new functionality introduced by the April 2020 release relates to the **Contract custom field**.

Application of a required Contract custom field

This explanatory note provides you with the instructions to apply and understand the notion of the required custom field in the Lease.

Repository

Creation of a required custom field

In the Lease repository (as illustrated in the screenshot below), the field is created via the “Champs personnalisés” (Custom fields) menu, and then the “Contrats de location” (Lease contracts) sub-menu.



Customer
VIAREPORT

Environment
KM

Search in menu

 Go to homepage

 Assistance

 Master data

 Period-end closing

 Entries

 Statements

ADMINISTRATION

- API tokens management
- Data access rights
- Standard management
- Users management
- Full Details

METADATA

- Legal entities
- Currencies
- Assets categories

CUSTOM FIELDS

- Legal entities
- Lease

The  button lets you create a new custom field.

New custom field

Information

Code *

Label *

Required field

Required field

Description

Type *

Boolean

Alphanumeric

Date

List of values

☐ Mandatory

Cancel

Create

4

Viareport Copyright

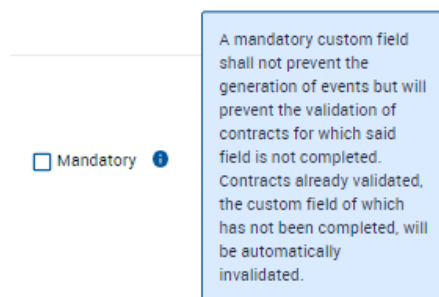
insightsoftware.com

Attention

It is important to remember what the different types of fields mean:

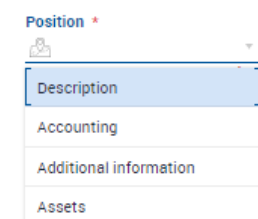
- Boolean => YES or NO switch
- Alphanumeric => Free text field up to 256 characters
- Date => Choice from a calendar
- List of Values => Choice from the values maintained by the administrator

The notion of required field when inputting a contract will be managed in this area, which should be checked or left unchecked.



Attention

Activating this choice will invalidate contracts for which the field has not been input. If the field has been input, there will be no effect on the contract. The field will be positioned in one of the 4 zones available to be able to complete it in the contracts. This choice is made via the position menu.

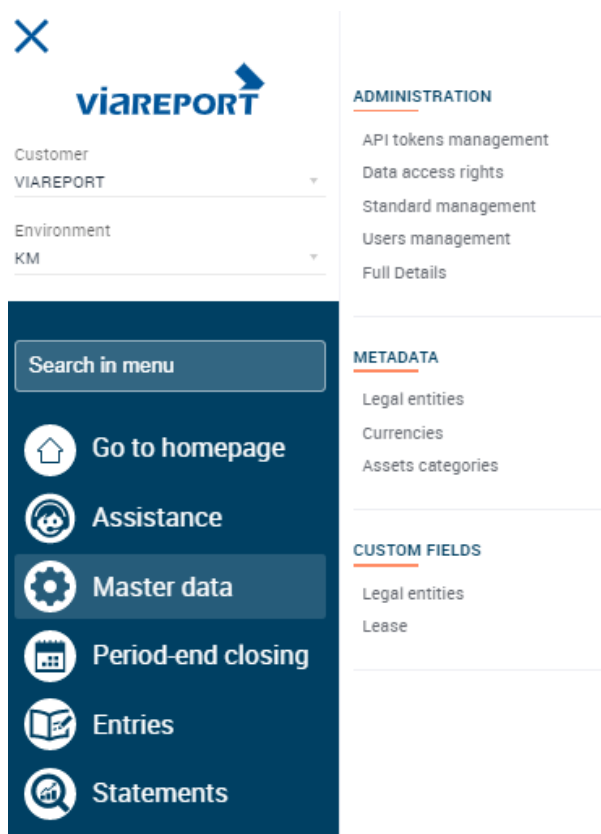


Update of an existing field

This new functionality also lets you modify the settings of existing custom fields so as to make them required or not required.

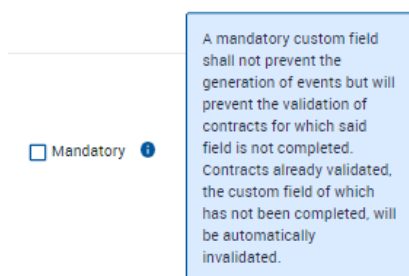
For this, the administrator performs the following actions:

In the Lease repository (as illustrated in the screenshot below), a field is modified via the “Champs personnalisés” (Custom fields) menu, and then the “Contrats de location” (Lease contracts) sub-menu.



The custom field should be opened.

The notion of the required field when inputting a contract will be managed in this area, which should be checked or left unchecked.



Attention

Activating this choice will invalidate contracts for which the field has not been input. If the field has been input, there will be no effect on the contract.

The following message must be confirmed to make the field a required field.

Confirm the custom field is mandatory

Please note that the creation or modification of a mandatory custom field will automatically invalidate all contracts for which this field is not completed. Are you sure you want to continue?



Effect on the contracts

On “unvalidated” contracts

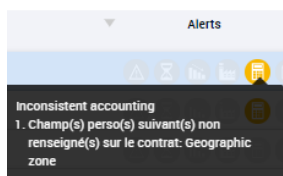
Below is an extract of the Contrathèque (Contract library) before the activation:

Reference	Lessor	Lessee	Created by	Modified	Alerts	Status	Actions
A - 1 LOY CERTAIN ↔ X LOY ↔ LOY CER...	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ X LOY ↔ INDICE	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ X LOY ↔ INDEX	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/15/2020			
A - 1 LOY CERTAIN ↔ X LOY + REDUCTIO...	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/15/2020			
A - 1 LOY CERTAIN ↔ X LOY	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ LEP ↔ INDEX	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ LEP ↔ INDEX	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ LEP ↔ 1LOY	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/15/2020			
A - 1 LOY CERTAIN ↔ LEP + REDU SURF...	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ LEP	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			

After the required notion is activated, a “comptabilité incomplete” (accounting incomplete) alert is set up to warn the user that a field required for the contract is missing.

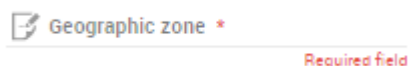
Reference	Lessor	Lessee	Created by	Modified	Alerts	Status	Actions
A - 1 LOY CERTAIN ↔ X LOY ↔ LOY CER...	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ X LOY ↔ INDICE	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/10/2020			
A - 1 LOY CERTAIN ↔ X LOY ↔ INDEX	BNP - Bnp paribas	NON_REG - Test de non regression	BOREBI	04/15/2020			

You can see the reason for the alert by hovering over the alert icon.



The user must input the field to cancel the alert.

The field to be input is identified by an asterisk and the note “Champs requis” (Required field), as shown in the screenshot below.



Note that a custom field can be imported. In this case, see the explanatory note “How do I import custom fields to my Lease contracts?”.

On “validated” contracts

Below is an extract of the Contrathèque (Contract library) before the activation:

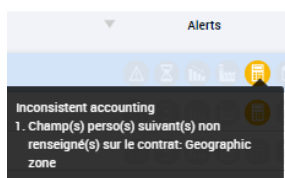
Reference	Lessor	Lessee	Created by	Modified	Alerts	Status	Actions
A- 1 LOY CERTAIN ↔ X LOY + REDUCTIO...	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/15/2020			
A- 1 LOY CERTAIN ↔ LEP ↔ 1 LOY	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/15/2020			

After the required notion is activated, a “comptabilité incomplete” (accounting incomplete) alert is set up to warn the user that a field required for the contract is missing.

The contract that was “validé” (validated) has been invalidated by the administrator’s action.

Reference	Lessor	Lessee	Created by	Modified	Alerts	Status	Actions
A- 1 LOY CERTAIN ↔ X LOY ↔ LOY CER...	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ X LOY ↔ INDEX	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ X LOY ↔ INDEX	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/15/2020			
A- 1 LOY CERTAIN ↔ X LOY + REDUCTIO...	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/15/2020			
A- 1 LOY CERTAIN ↔ X LOY	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ LEP ↔ INDEX	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ LEP ↔ INDEX	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ LEP ↔ 1 LOY	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/15/2020			
A- 1 LOY CERTAIN ↔ LEP + REDU SURF...	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ LEP	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ INDEX + REDU SU...	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			
A- 1 LOY CERTAIN ↔ INDEX	BNP - Bnp paribas	NOHL_REO - Test de non regression	BOREBI	04/10/2020			

You can see the reason for the alert by hovering over the alert icon.



The user must input the field to cancel the alert.

The field to be input is identified by an asterisk and the note “Champs requis” (Required field), as shown in the screenshot below.

 Geographic zone *

Required field

Note that a custom field can be imported. In this case, see the explanatory note “How do I import custom fields to my Lease contracts?”.