

Custom Data Sets

You can define custom location-specific data types that can then be used in filters, such as to reject locations with a particular value. Or, this data can be used as a sort option in scenarios to compare the locations. This may be hourly rates, staff levels, or other attributes that apply to every location but may vary in value.

Data types can also be populated in many APIs as a `customData` object with the configured name and a value appropriate to the data type.

Note that changes to Order Routing settings may not immediately take effect when processing orders. It may take up to 15 minutes for updates to be reflected in the system while the cache refreshes.

Data Sets Page

All existing data types are listed under the **Custom Data Sets** page, under the **Data Types** tab shown below.

On this page, an additional list of Actions will appear under the side navigation menu.

Data Set Table

The custom data types will be reflected in the table under the Data Set tab, with a row for each location and all custom data types listed as columns so that they can be modified for each location. Click the pencil icon to edit a row or click **Add Location** to add an empty row for a new location with custom data.

Adding and Editing Data Types

New data types can be added under the **Add Data Type** action. That form will prompt you to enter the name, whether it can be filtered or sorted by, the data type, optional unit of measurement if applicable to the data type, and an optional default value before clicking **Save** to create the data type.

These same options are displayed when editing an existing data type:

Uploading Data Sets

Data sets can be created as well as modified in bulk via the Upload data set action section listed under the navigation menu. This may be more efficient if a large amount of updates need to be made at once, rather than individually changing each location entry in the data set table.

The upload tool will accept a .CSV file to update any existing data types across the entire set of locations. New data types cannot be created via this file upload, however - they must be defined per the instructions above. A template for this .CSV can be downloaded from the action menu as well.

