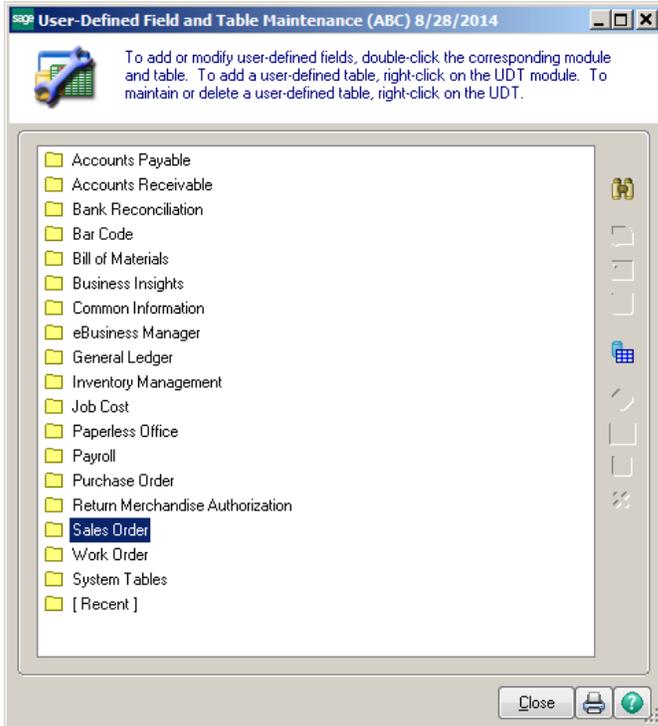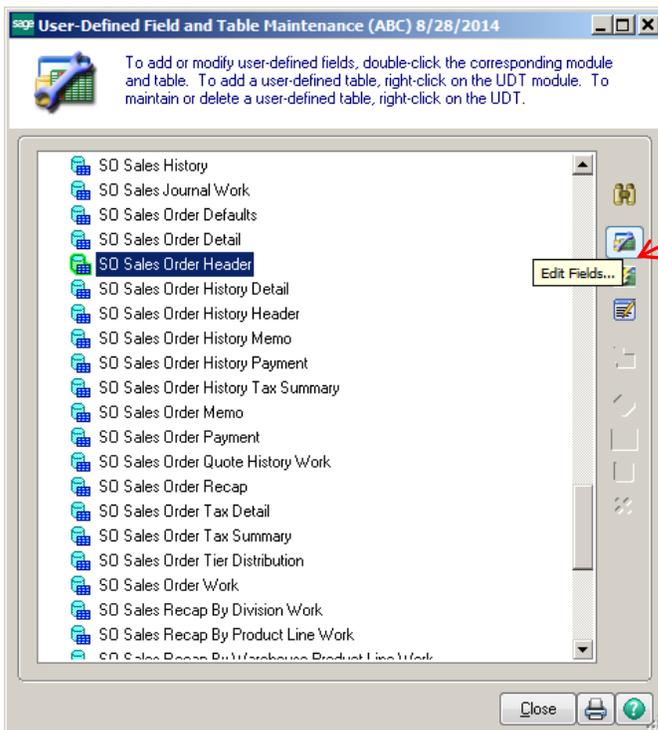# How to Add a Custom Office Field that Posts Through to History Files
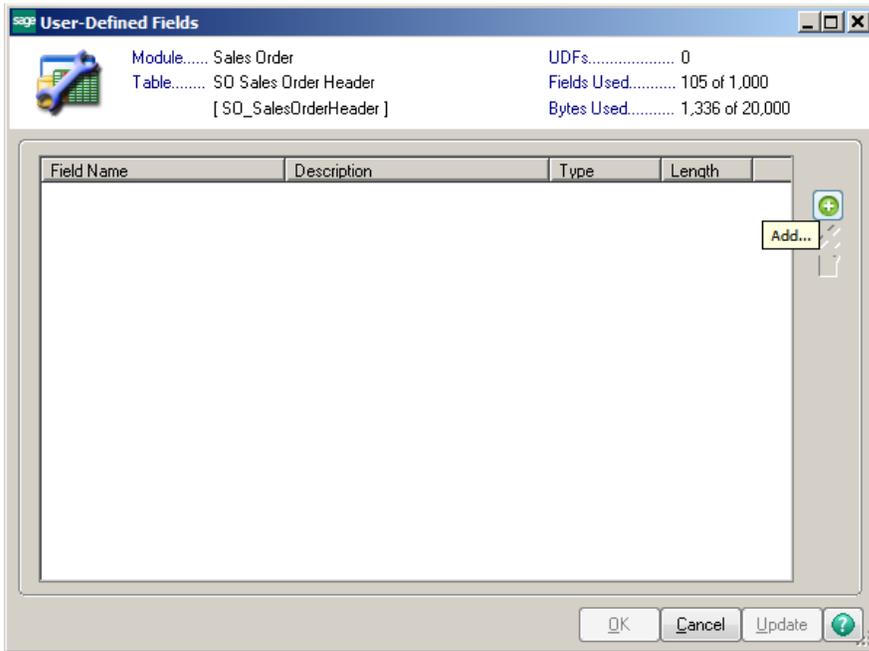
Click on Custom Office. Then select User-Defined Field and Table Maintenance. Select the Module that you would like to add the fields too.
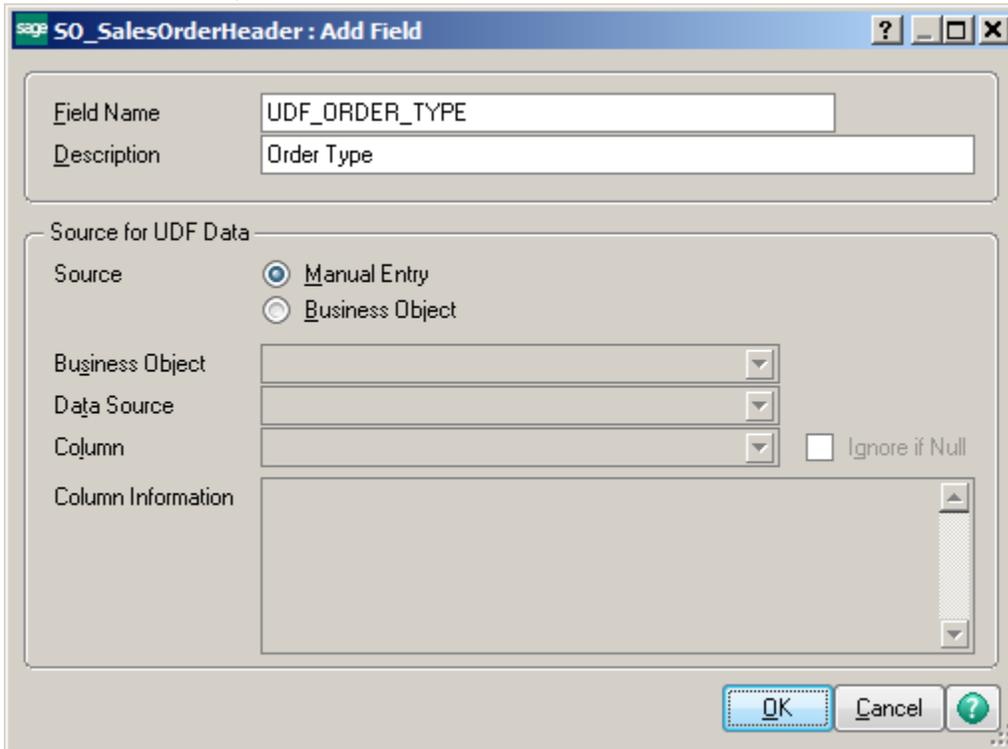

Select the File that you are adding the fields to, Double click on the file name, then click Edit Fields or click the Edit Fields icon.

Click the Add button.

Enter the new field name, click OK.

Attributes Tab -

Data Type:
Select a data type. The data type determines the type of data that can be stored for a user-defined field (UDF).

- A multi-line UDF can use any data type.
- A drop box and list box can use a string data type.
- A check box can use only a string data type.

The data type cannot be changed after data is entered for the UDF; however, you can delete and redefine the UDF (all data associated with the UDF will be deleted).

Maximum Length:
Type the maximum length field value. The maximum length specifies the maximum number of characters allowed for the user-defined field (UDF).

- For date type fields, the length is set at 10, and this field is not available.
- For numeric type fields, the length is set to 15, and this field is not available.
- For check box type fields, the length is set to 1, and this field is not available.

The total number of characters for all UDFs for an entity cannot exceed 20,000. The maximum length cannot be reduced after data is entered for the UDF; however, you can delete and redefine the UDF (all data associated with the UDF will be deleted).

Validation Types

Select a validation type for the user-defined field (UDF).

- Select None if validation is not performed for the UDF. This field is available only if Multi-Line is selected in the Control Type field.

- Select Range to specify the minimum and maximum values allowed for the UDF. This field is available only if Multi-Line is selected in the Control Type field.

- Select List to specify a list of values allowed for the UDF. Each line of text represents a separate, valid value. The values established in this field determine the valid values for drop-box and list-box fields. A list is limited to 900 bytes and is automatically truncated to this size if the limit is exceeded.

- Select User-Defined Table to validate the UDF against the key to an existing user-defined table (UDT). You can only validate against a UDT whose key length and type are the same as the UDF key length and type. On the Attributes tab, the UDF key length is entered in the Maximum Length field, and the UDF key type is selected in the Data Type field. This field is available only if Multi-Line is selected in the Control Type field.
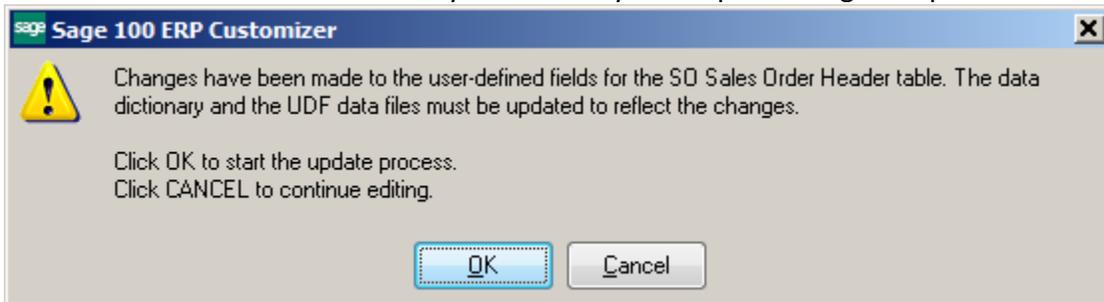
Click Ok, when done entering values.

*Note – use caution when making a field required.

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.
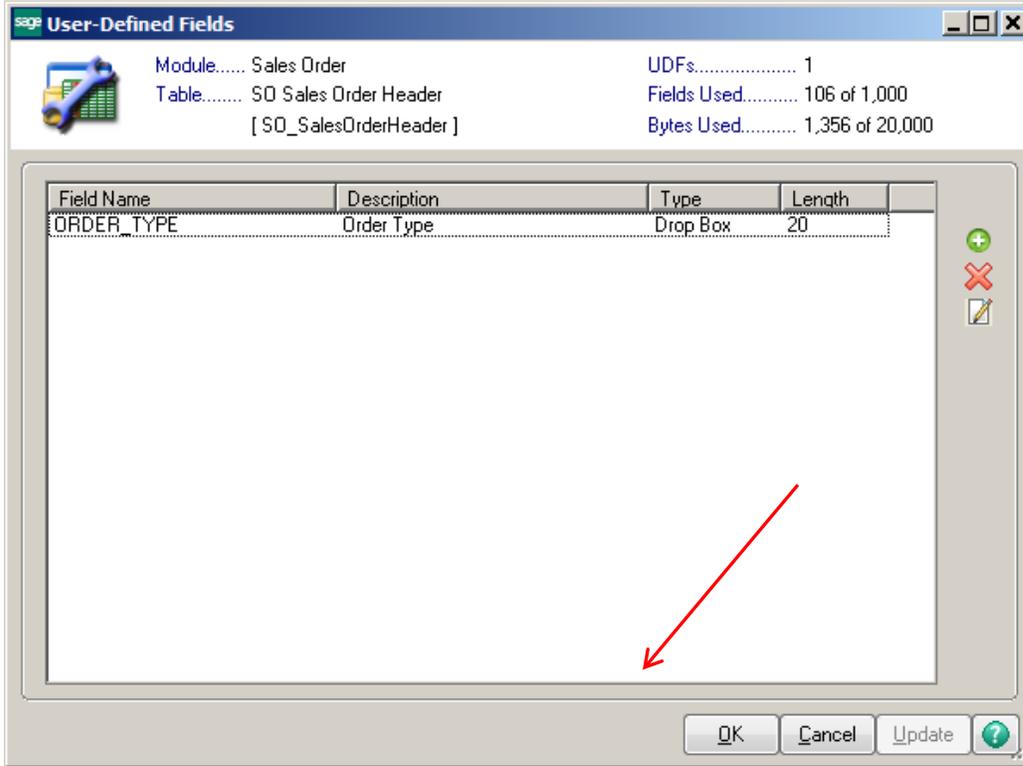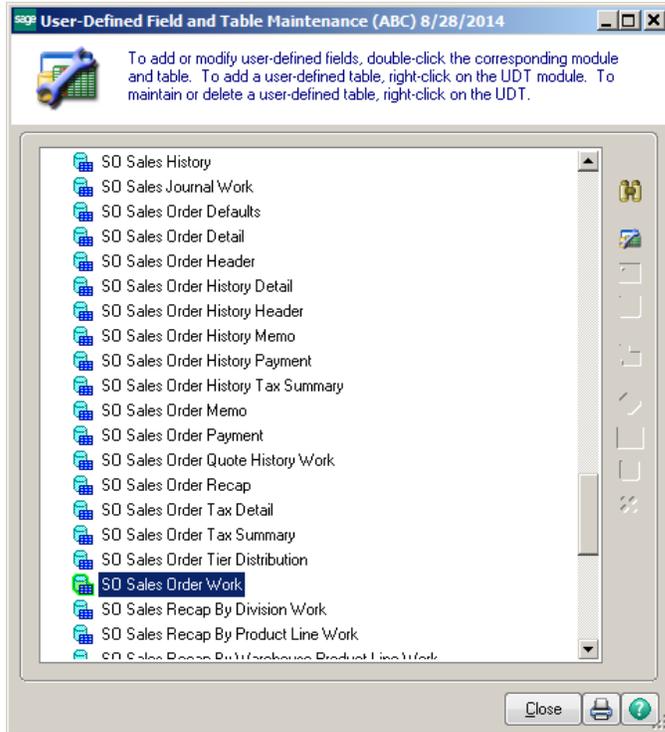

Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.
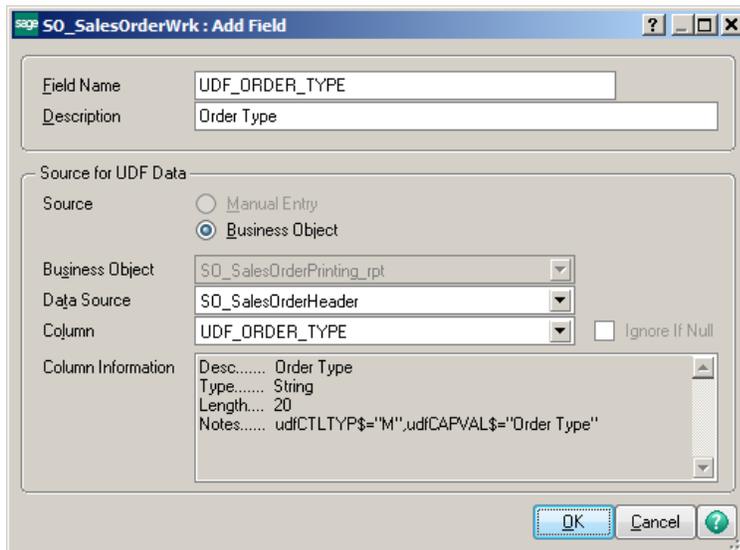
To Add UDF to Sales Order form:

Select the SO Sales Order Work table.

Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Data Source – select SO_SalesOrder Header
- Column – select the UDF field created for the Sales Order Header

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Header file. Click OK.

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.
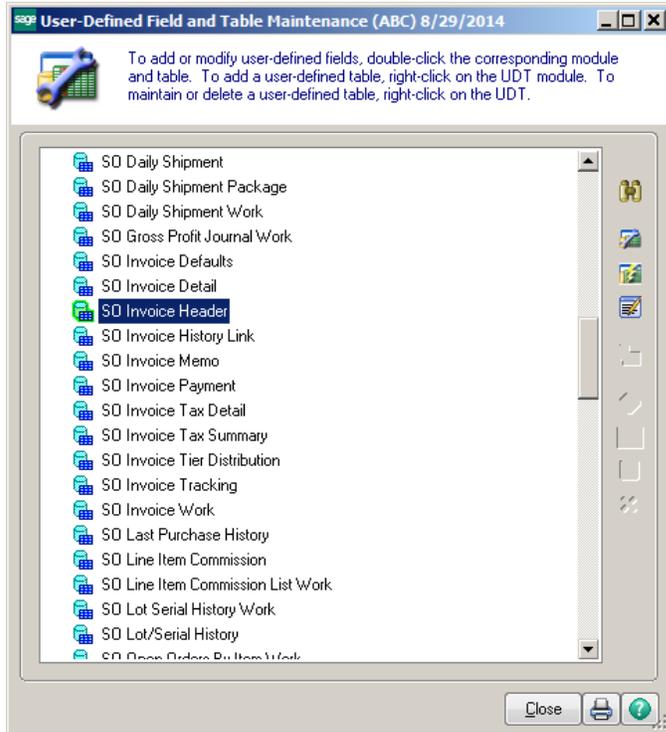
Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.
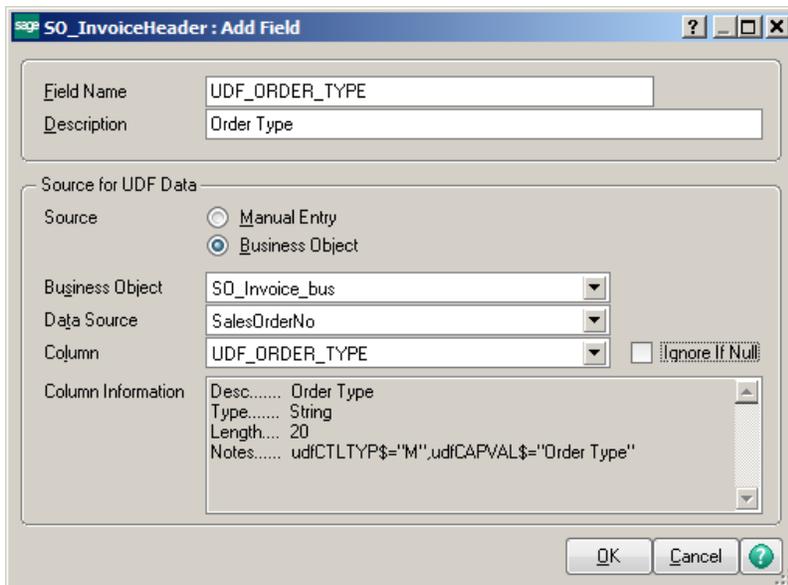

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⚠ Changes have been made to the user-defined fields for the SO Sales Order Work table. The data dictionary and the UDF data files must be updated to reflect the changes.

Click OK to start the update process.
Click CANCEL to continue editing.

[OK]   [Cancel]

To Add UDF to Sales Order Invoice:

Select the SO Invoice Header table.

Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Business Object – select SO_Invoice_bus
- Data Source – select SalesOrderNo
- Column – select the UDF field created for the Sales Order Header

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Header file. Click OK.
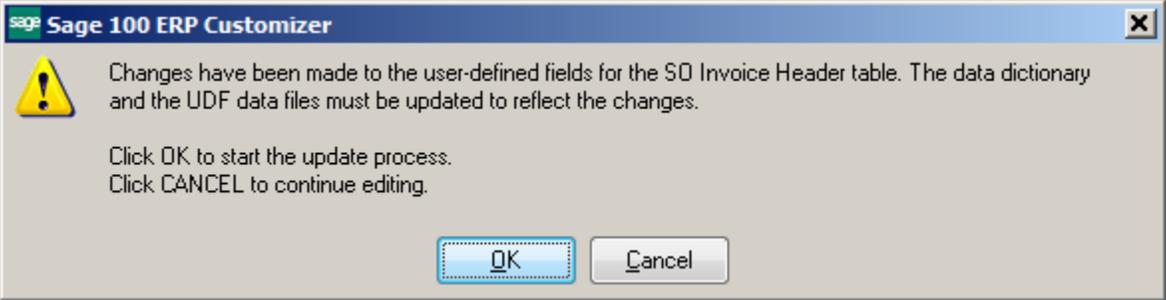

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.

Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.
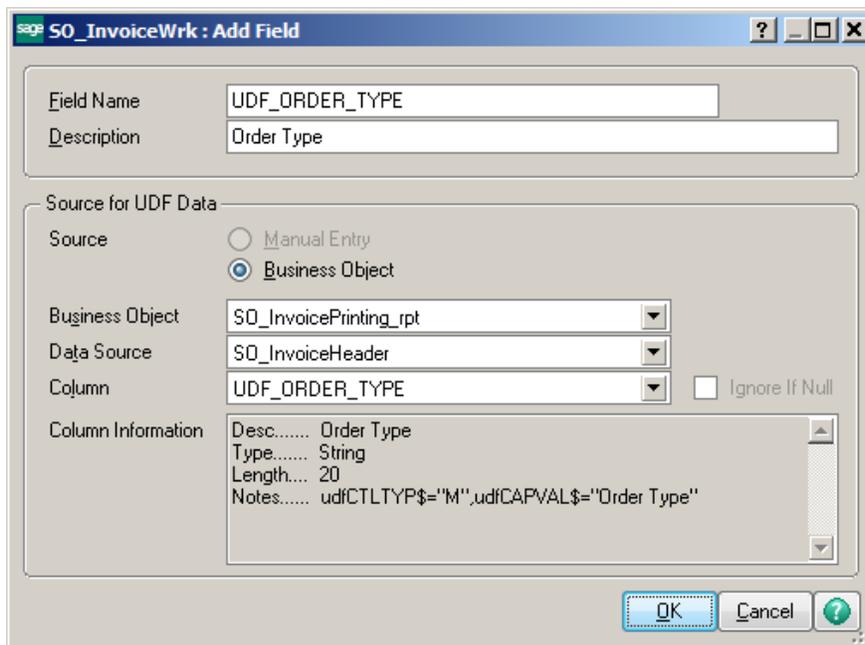

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Changes have been made to the user-defined fields for the SO Invoice Header table. The data dictionary and the UDF data files must be updated to reflect the changes.

Click OK to start the update process.
Click CANCEL to continue editing.

[OK]   [Cancel]

To Add UDF to Sales Order Invoice form:

Select the SO Invoice Work table.
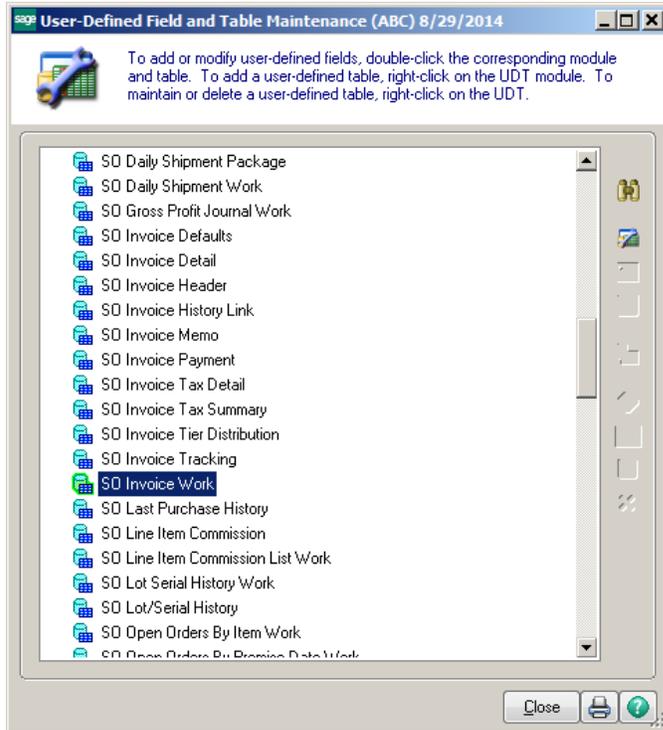
Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Business Object – SO_InvoicePrinting_rpt
- Data Source – select SO_Invoice Header
- Column – select the UDF field created for the Sales Order Header

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Header file. Click OK.

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.

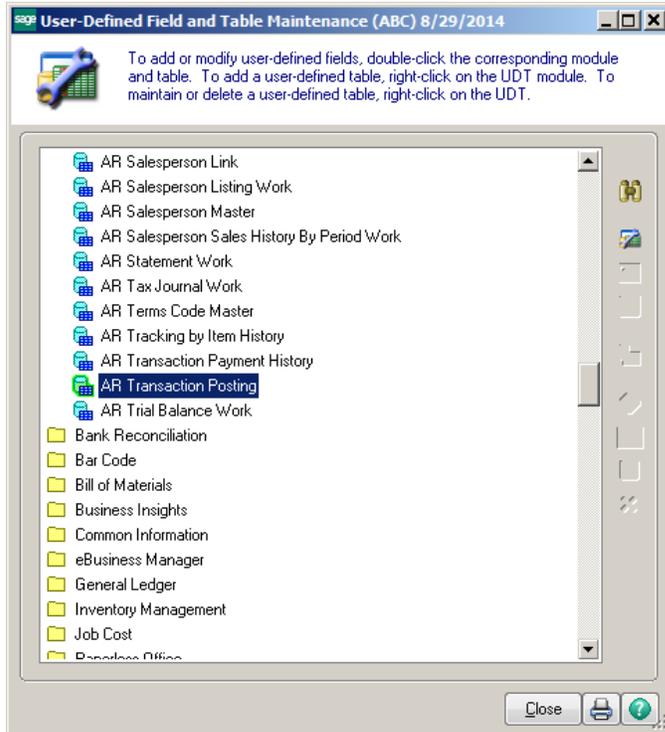Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.

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⚠ Changes have been made to the user-defined fields for the SO Invoice Header table. The data dictionary and the UDF data files must be updated to reflect the changes.

Click OK to start the update process.
Click CANCEL to continue editing.
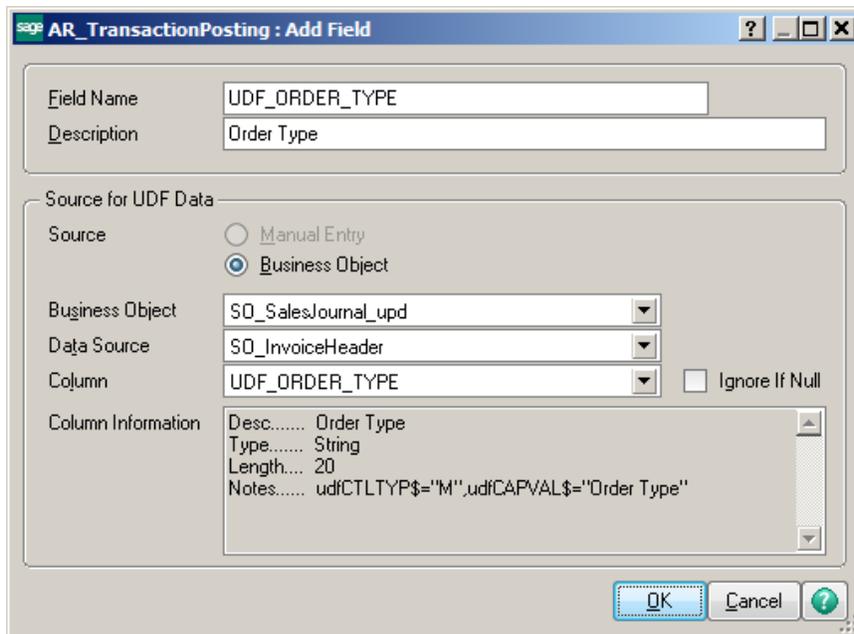
[OK]   [Cancel]

To Post it to the AR Files:

Select the AR Transaction Posting file.

Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Business Object – SO_SalesJournal_upd
- Data Source – select SO_InvoiceHeader
- Column – select the UDF field created for the Sales Order Invoice

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Invoice Header file. Click OK.

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.

Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.
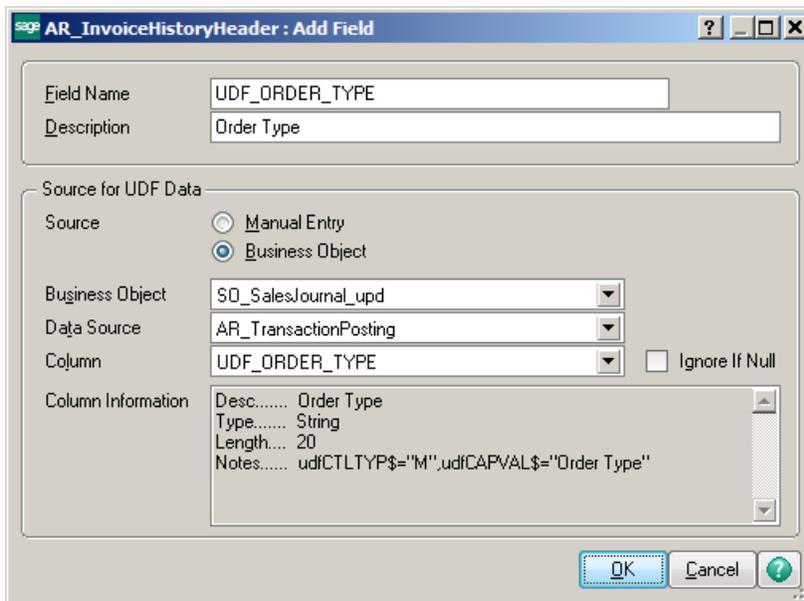
To Add the field to the Invoice History File:

Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Business Object – SO_SalesJournal_upd
- Data Source – select AR_TransactionPosting
- Column – select the UDF field created for the Sales Order Invoice

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Invoice Header file. Click OK.
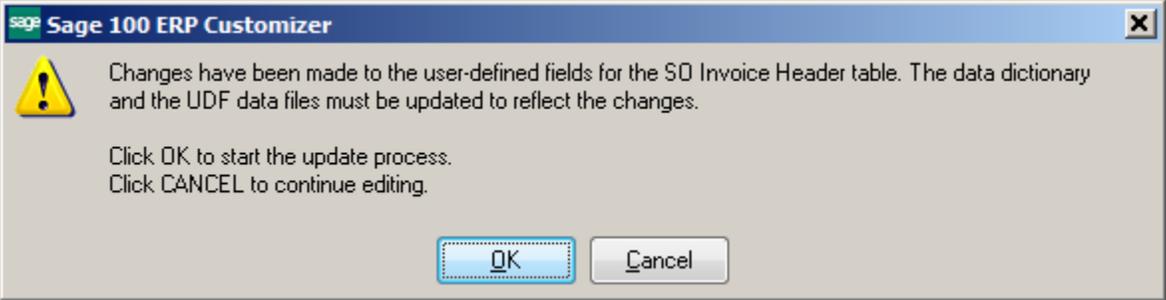

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.

Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.
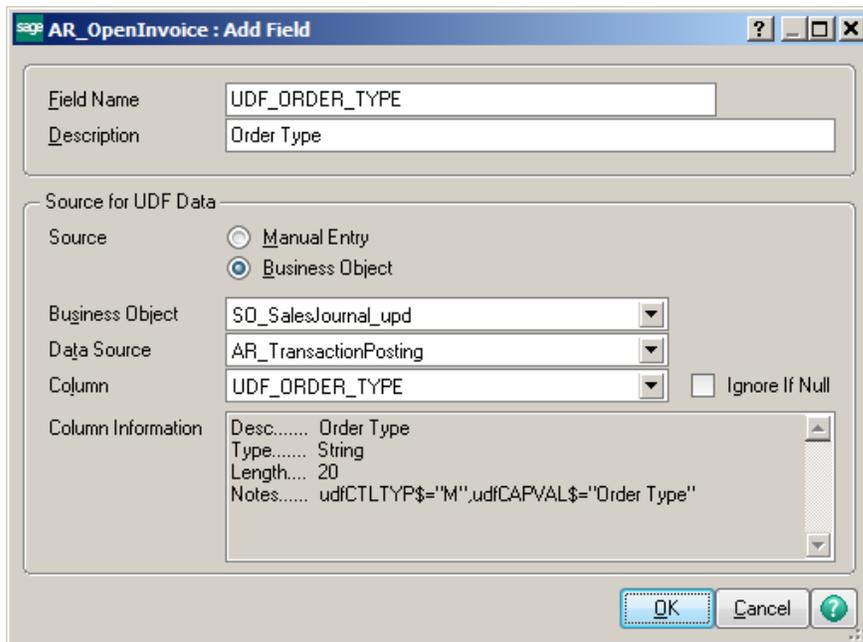

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Changes have been made to the user-defined fields for the SO Invoice Header table. The data dictionary and the UDF data files must be updated to reflect the changes.

Click OK to start the update process.
Click CANCEL to continue editing.

[OK] [Cancel]

To Add to Customer Maintenance Invoice Table:

Select the AR Open Invoice table.

Click the Add button and enter the Field Name.
- Source Field – select Business Object
- Business Object – SO_SalesJournal_upd
- Data Source – select AR_TransactionPosting
- Column – select the UDF field created for the Sales Order Invoice

Click OK.

The Attributes screen will default to the values set up for the original UDF that was set up in the Sales Order Invoice Header file. Click OK.

Click OK on the User-Defined Fields screen to Update the new field to the Data Dictionary.

Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.

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Changes have been made to the user-defined fields for the SO Invoice Header table. The data dictionary and the UDF data files must be updated to reflect the changes.

Click OK to start the update process.
Click CANCEL to continue editing.
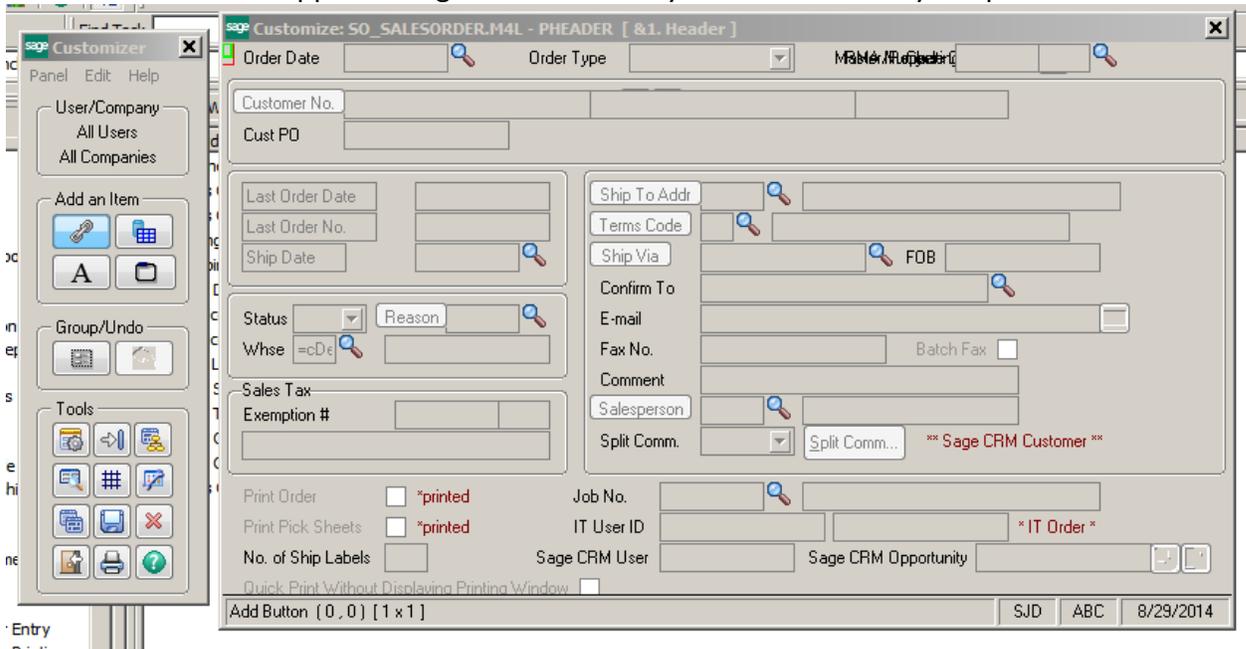
[OK]   [Cancel]

Adding Field to Screens:

Open Sales Order Entry. Right click on the screen and select Panel Settings. Click Customizer. Select All User and All Companies. Click OK.

**Note:** You can make this change for a User Group or just for a Specific User.
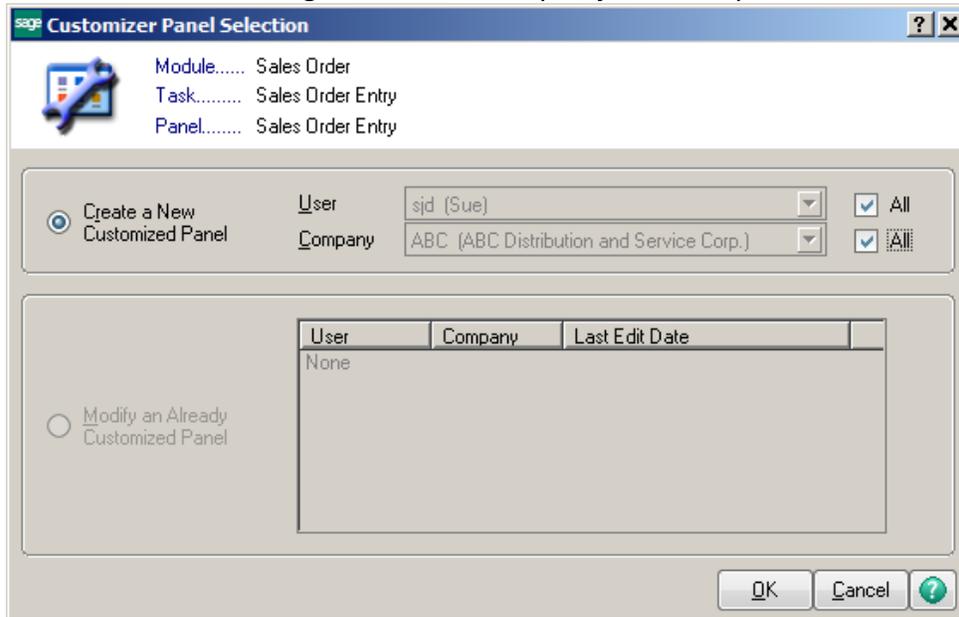
The Customizer Toolbox will appear along with the screen you were on when you opened Customizer.
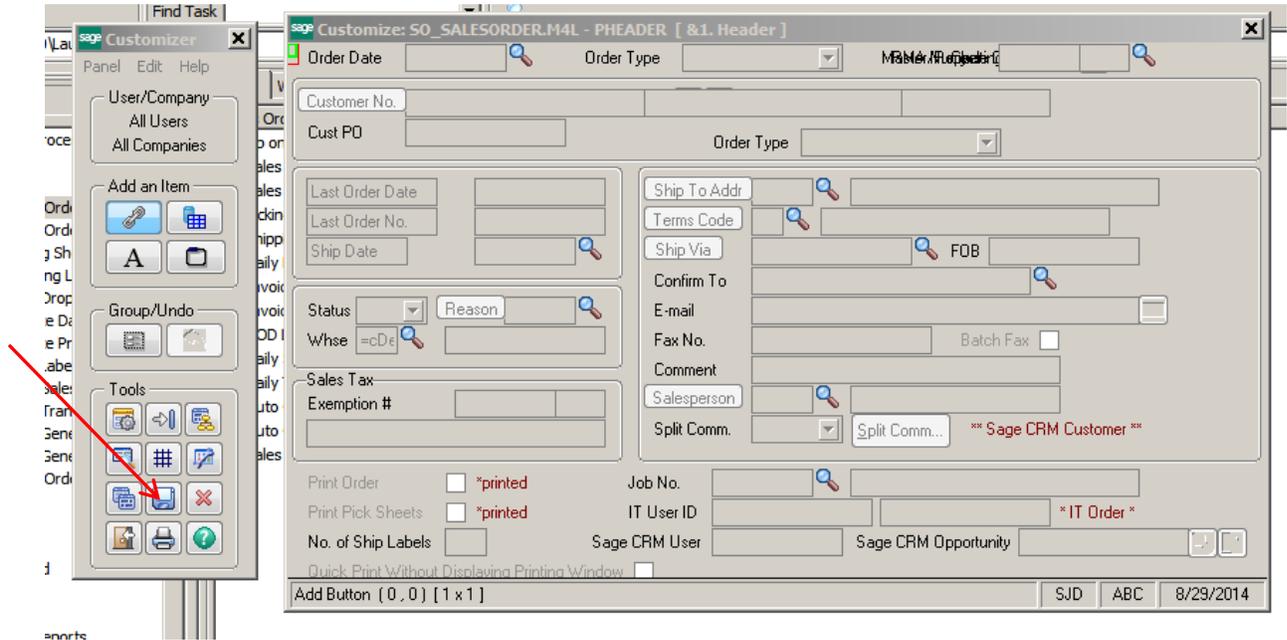
Determine where you want to add the field on the screen. Click the Add Field button on the Customizer Toolbox.
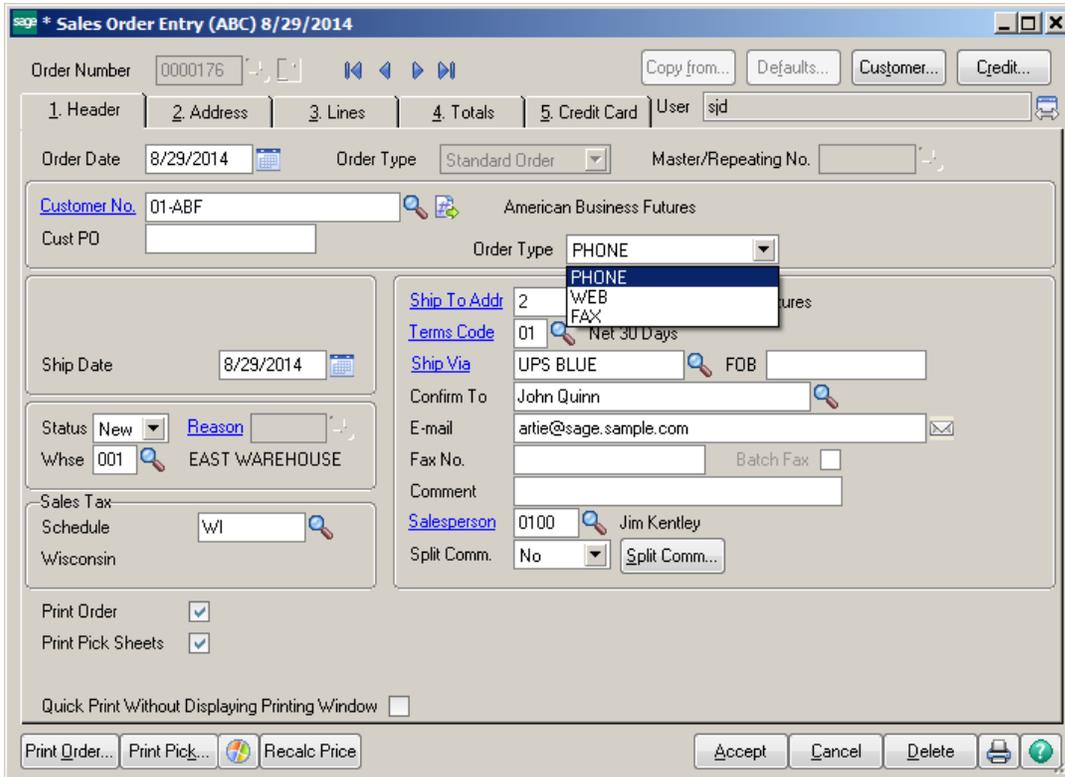

Draw the box where you want to put your field, then choose the field from the Field Selection pop-up window.
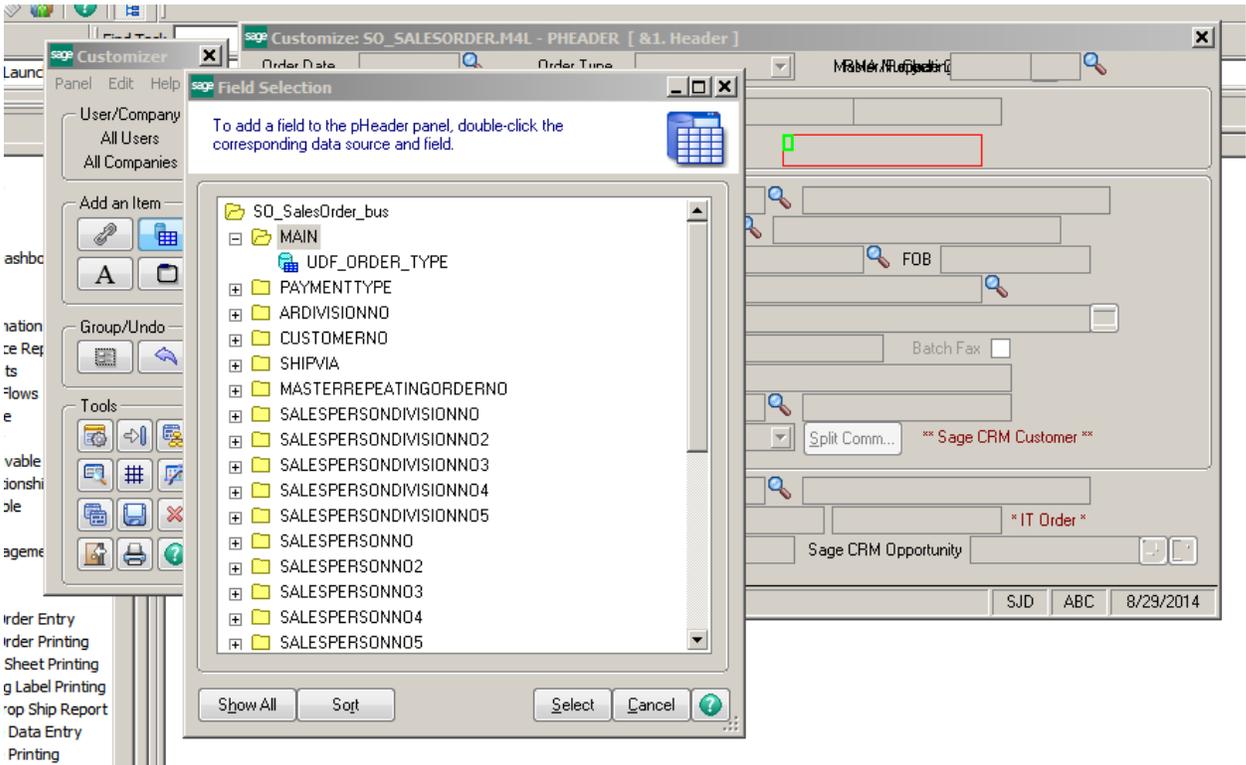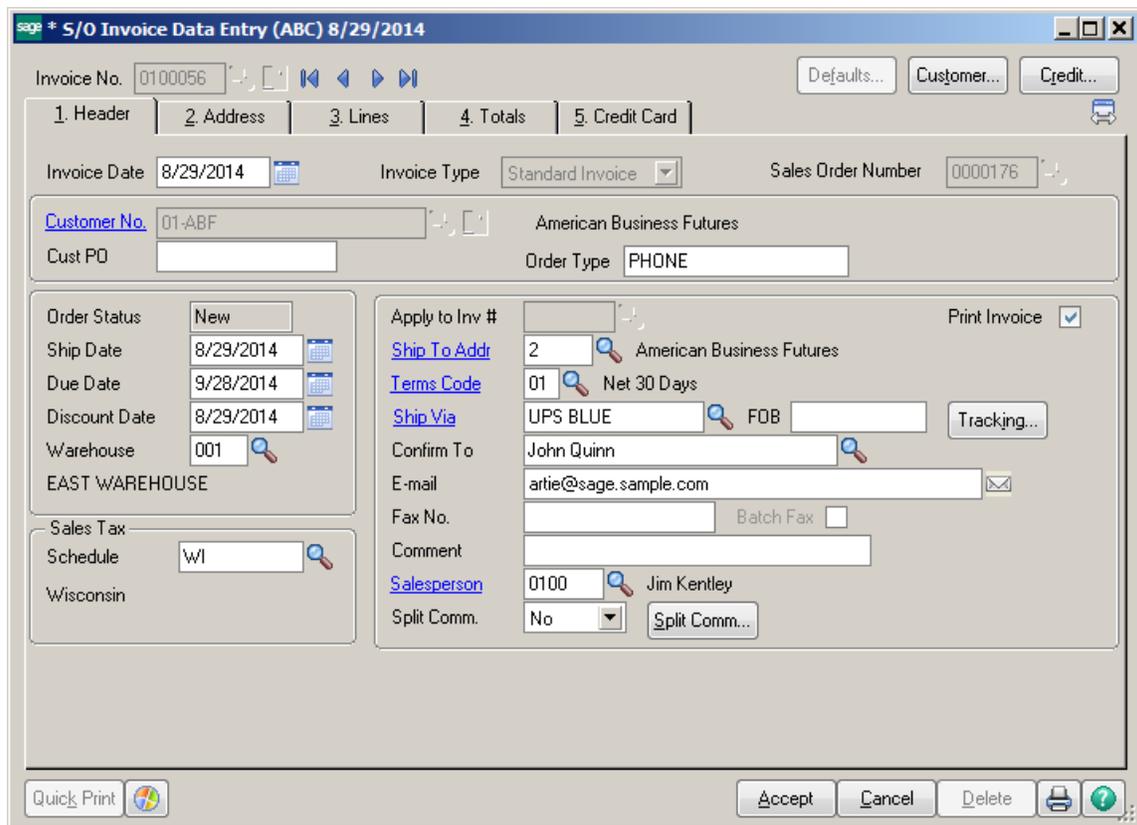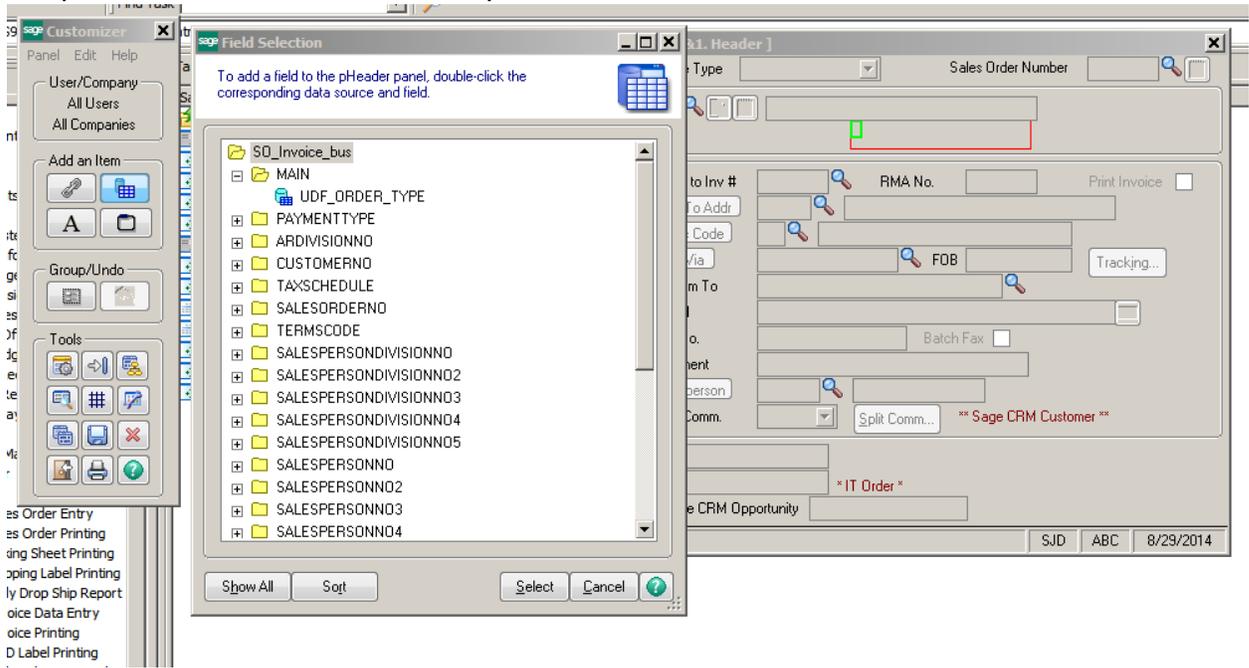
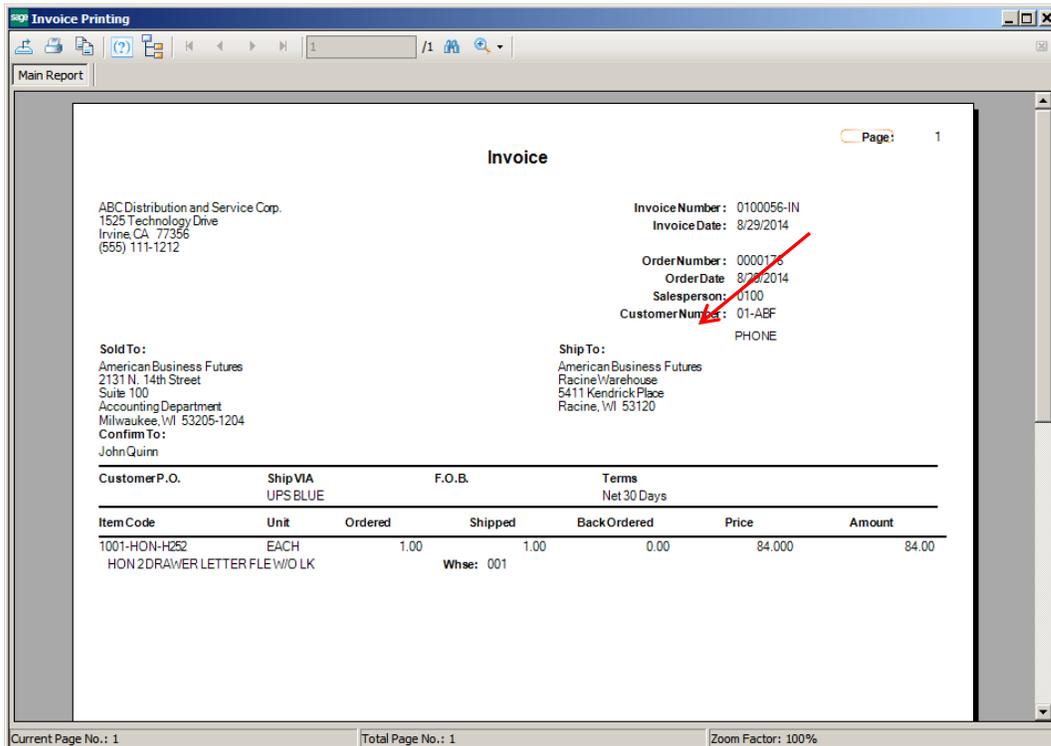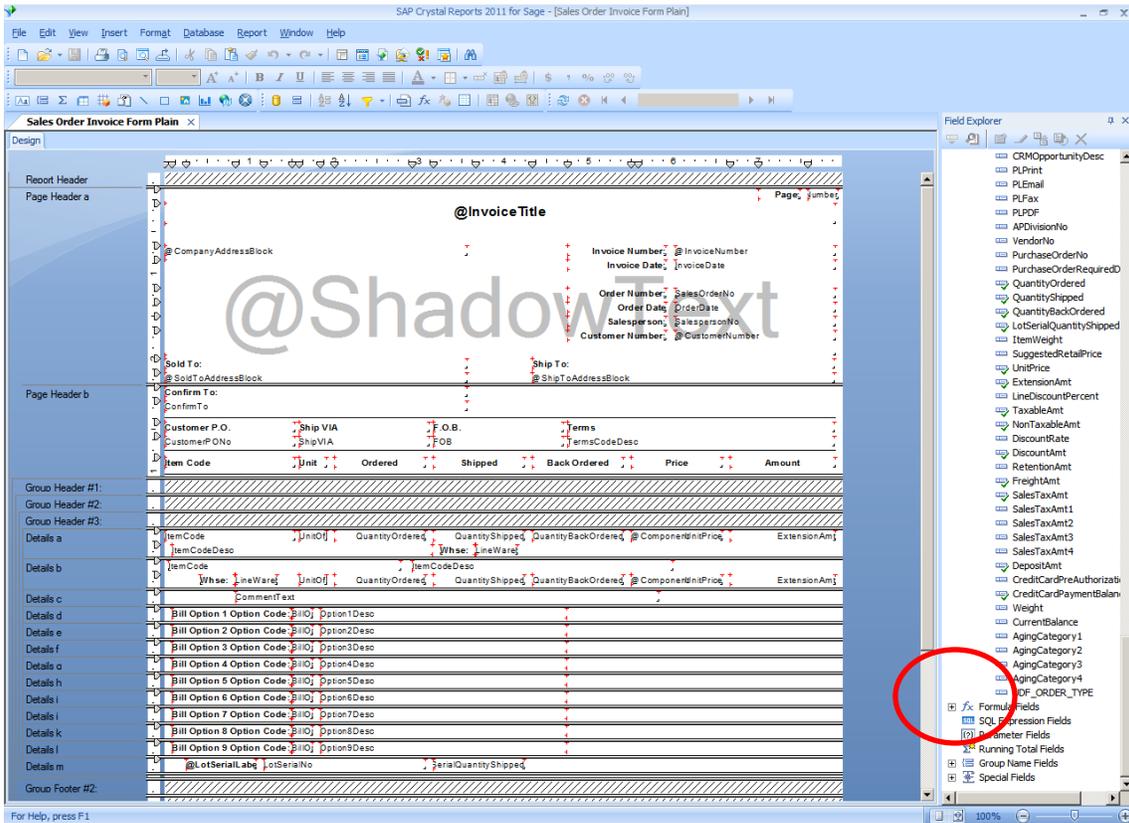Click on the Save button.

Exit screen when done.

Repeat the process for the Invoice Data Entry screen.

To Add field to Actual Form:

Click the Designer button on the Sales Order or Invoice printing screen. Confirm that the field is showing in the Database Fields selection area. If not, click the Database tab at top and then click Verify Database. Add field to form and Save.
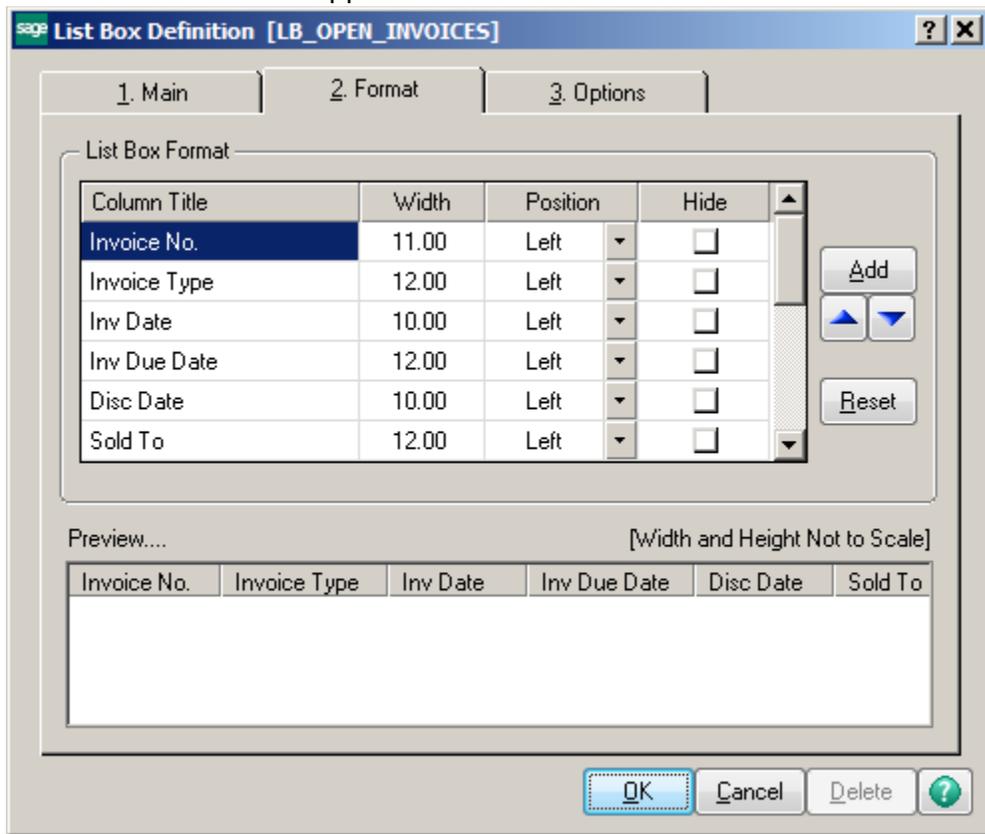
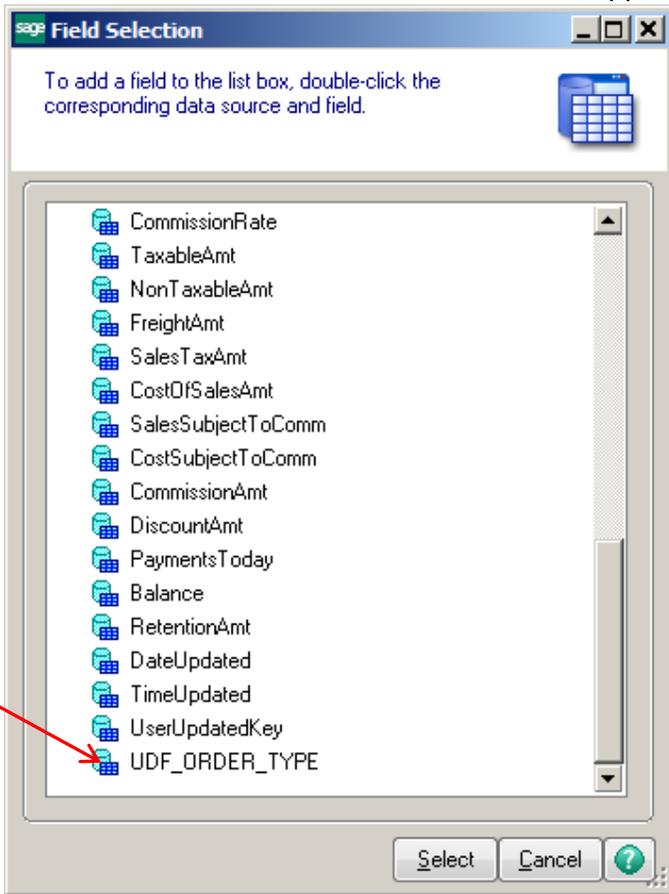## Add field to Customer Maintenance screen:

Open Customer Maintenance. Select the Invoices tab. Right click, choose Panel Settings and
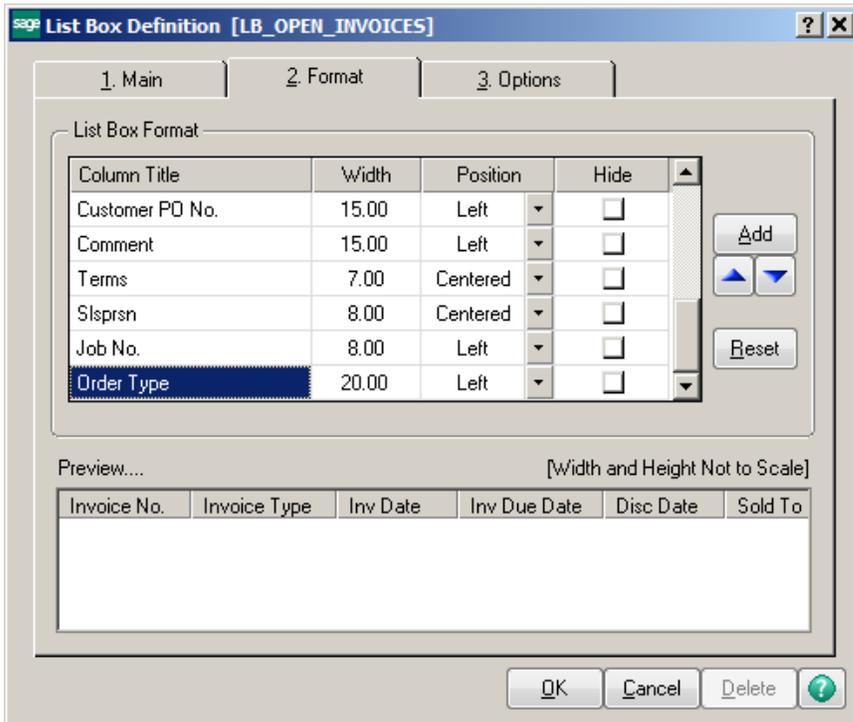Customizer. Right click in gray box.
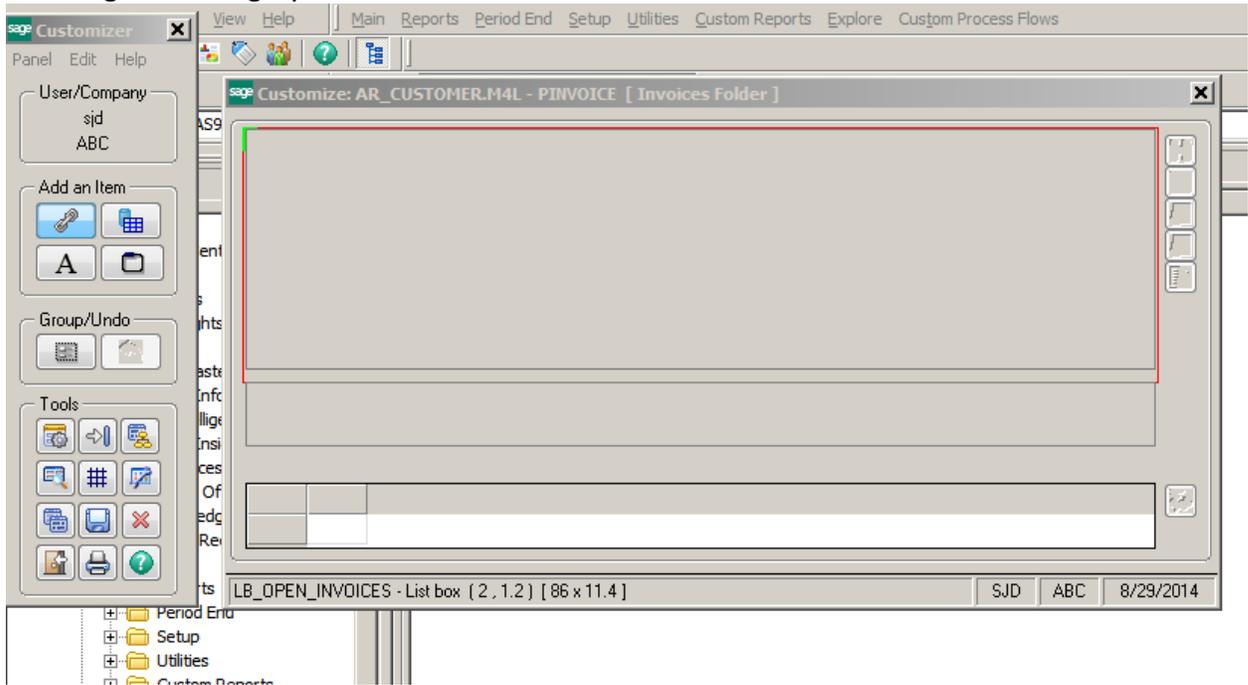
The List Box Definition box will appear. Click on the Format Tab.

Click on the Add button. The Field Selection box will appear. Scroll down and choose your field.

You can move the field up or down on the screen, depending on the order you wish to see it. Click Ok, then click the Save button on the Customizer toolbar. Exit the screens.

You will now be able to see the field from the Invoices tab in customer maintenance/inquiry.