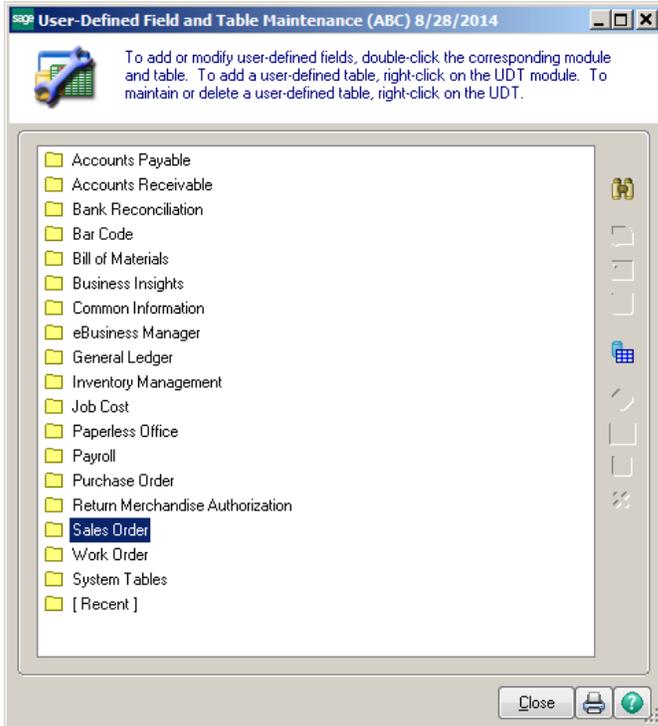
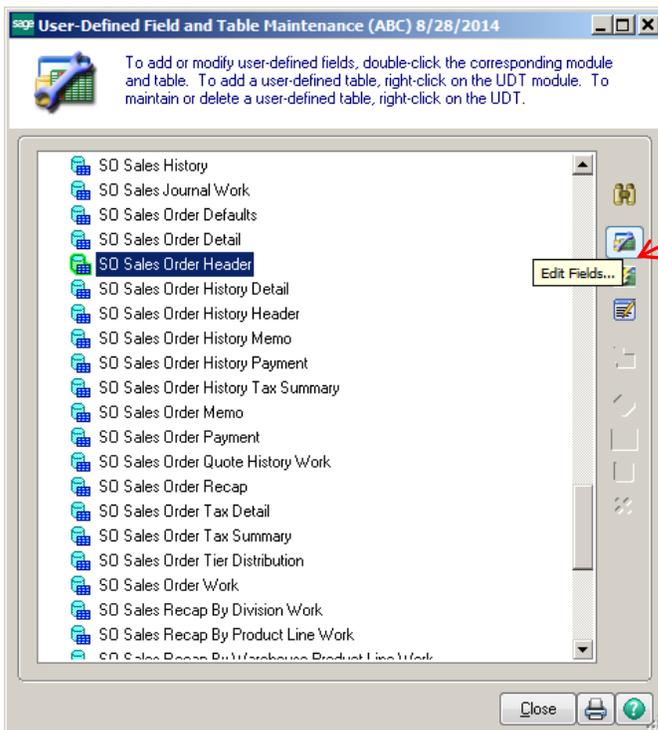


## How to Add a Custom Office Field that Posts Through to History Files

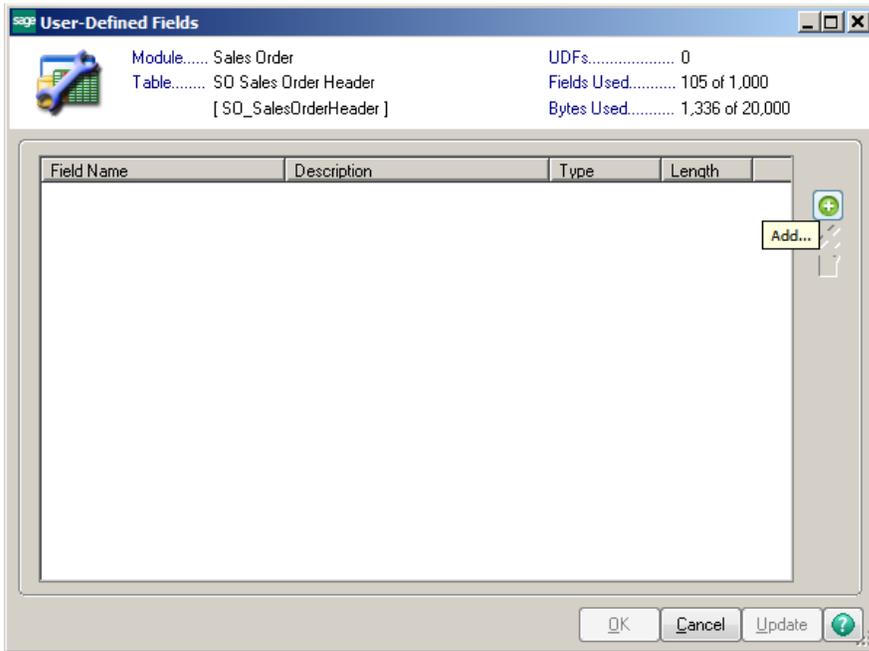
Click on Custom Office. Then select User-Defined Field and Table Maintenance. Select the Module that you would like to add the fields too.



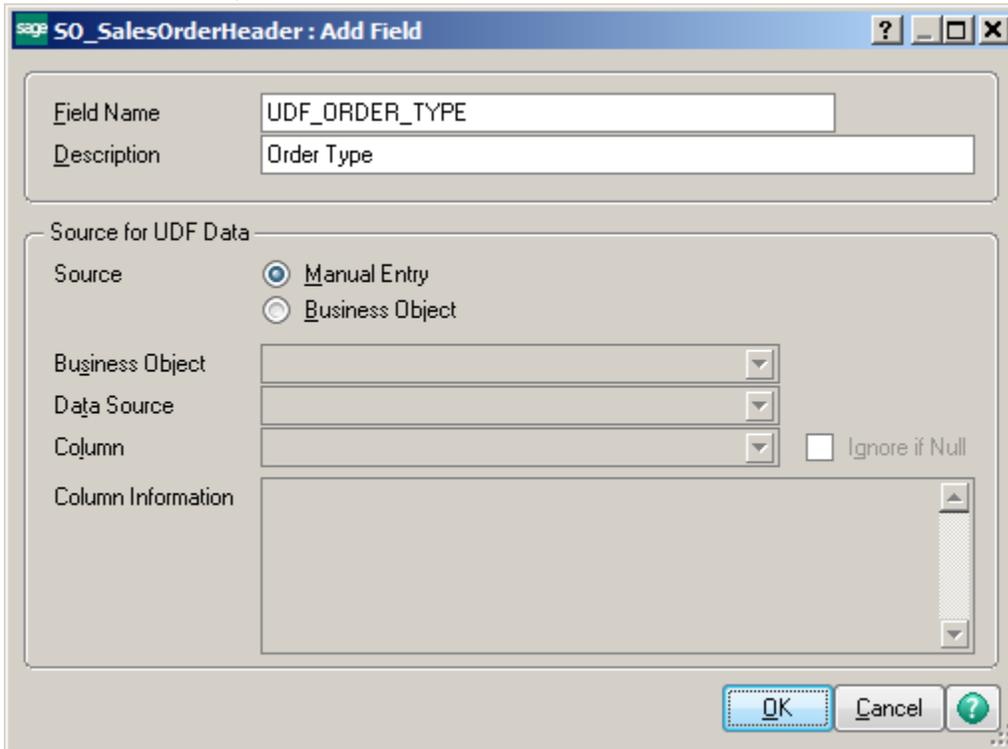
Select the File that you are adding the fields to, Double click on the file name, then click Edit Fields or click the Edit Fields icon.



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).

The screenshot shows a dialog box titled "SO Sales Order Header: Add Field" with three tabs: "1. Attributes", "2. Validation", and "3. Data Sources". The "Attributes" tab is active. It contains the following fields and options:

- Field Name:** UDF\_ORDER\_TYPE
- Description:** Order Type
- Control Type:** Radio buttons for Multi-Line, Drop-Box (selected), List-Box, and Check-Box.
- Data Type:** Radio buttons for String (selected), Numeric, and Date.
- Maximum Length:** A spinner box set to 20.
- Display Attributes:** Checkboxes for Uppercase, Fixed Font, Center Text, Right-Justify, and Borderless.
- Mask:** A checkbox and an empty text box.
- Default Value:** A checkbox and a dropdown menu.
- Caption:** A checked checkbox and a text box containing "Order Type".

On the right side of the dialog, there is a summary box with the following information:

- Field in Use..... No
- Bytes Used..... 1,356 of 20,000
- Name Space Used..... 1,481

A note below this box states: "Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names."

At the bottom right, there are buttons for "OK", "Cancel", and a help icon.

## Validation Types

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

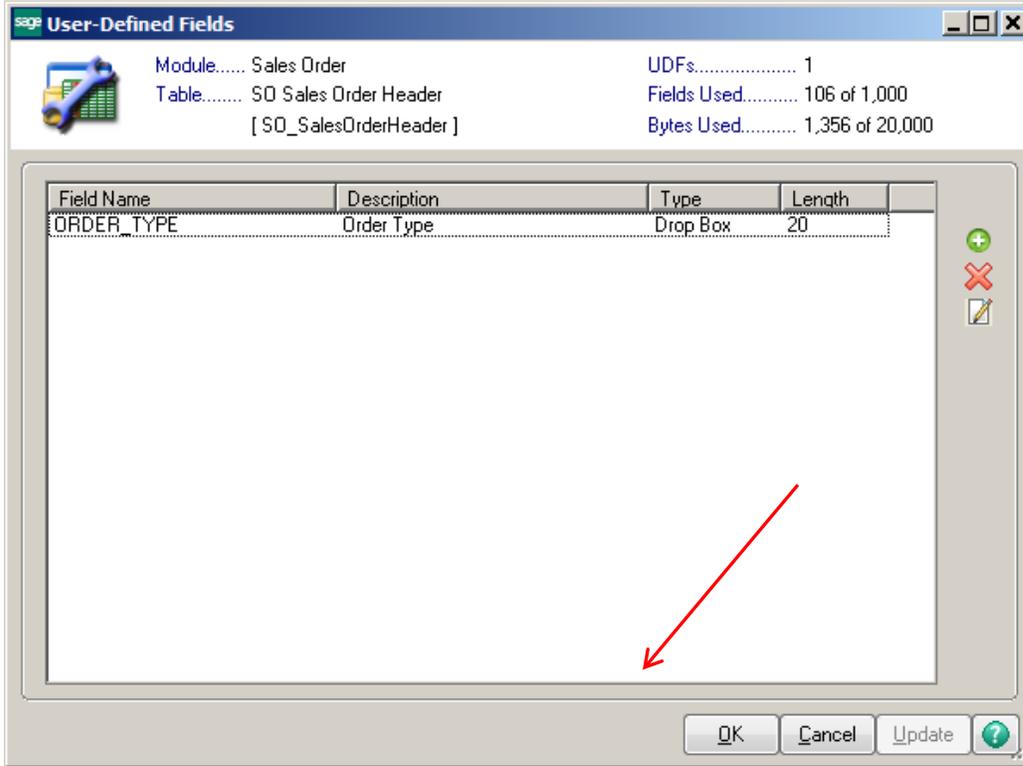
- Select None if validation is not performed for the UDF. This field is available only if Multi-Line is selected in the Control Type field.
- Select Range to specify the minimum and maximum values allowed for the UDF. This field is available only if Multi-Line is selected in the Control Type field.
- 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.

The screenshot shows the '50 Sales Order Header : Add Field' dialog box with the 'Validation' tab selected. The 'Field Name' is 'UDF\_ORDER\_TYPE' and the 'Description' is 'Order Type'. The 'Control Type' is 'Drop-Box'. The 'Validation' section has 'List...' selected, with a list box containing 'PHONE', 'WEB', and 'FAX'. The 'Required Field' checkbox is unchecked. The 'Field in Use' status is 'No', 'Bytes Used' is '1,356 of 20,000', and 'Name Space Used' is '1,481'. A note at the bottom of the dialog states: 'Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.' The dialog has 'OK', 'Cancel', and a help icon at the bottom right.

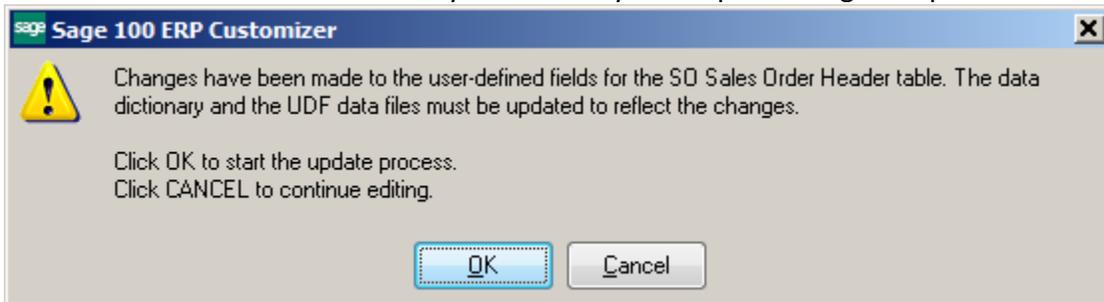
Click Ok, when done entering values.

**\*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.

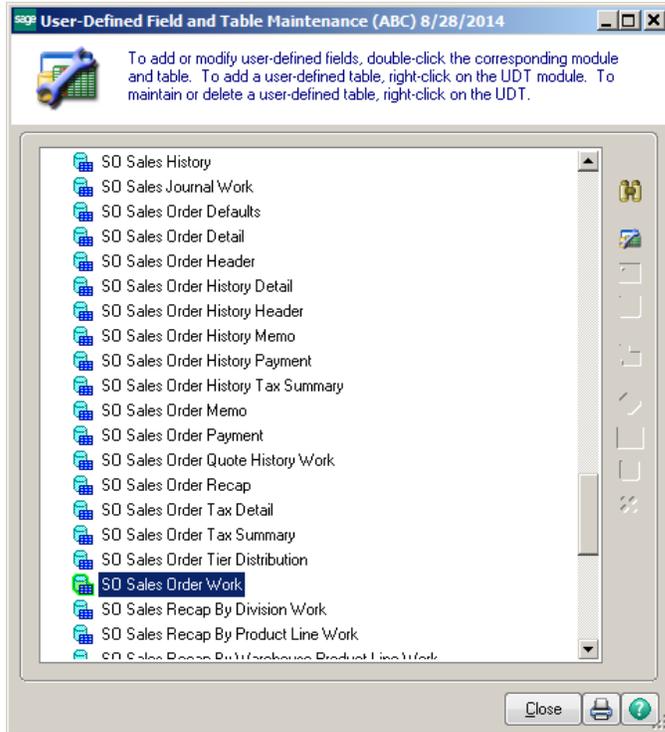


Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.



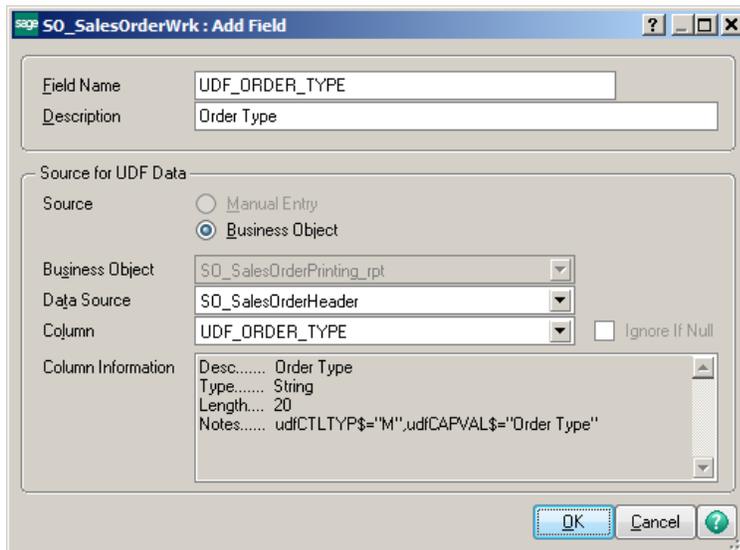
## To Add UDF to Sales Order form:

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.

SO Sales Order Work : Add Field

Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box

Field in Use..... No  
 Bytes Used..... 9,737 of 20,000  
 Name Space Used..... 2,525

Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

1. Attributes | 2. Validation | 3. Data Sources

Data Type:  String [ Sourced ]  
 Numeric  
 Date

Maximum Length: 20 [ Sourced ]

Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]

Mask  
 Default Value  
 Caption: Order Type

OK Cancel ?

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

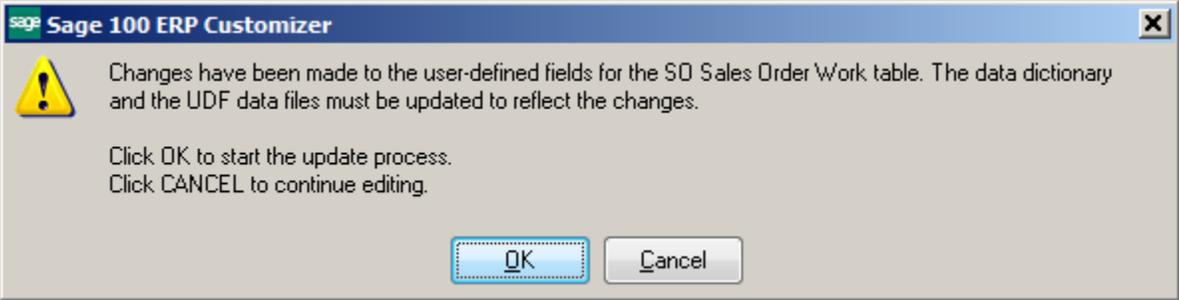
User-Defined Fields

Module..... Sales Order UDFs..... 1  
 Table..... SO Sales Order Work Fields Used..... 192 of 1,000  
 [ SO\_SalesOrderWrk ] Bytes Used..... 9,737 of 20,000

Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

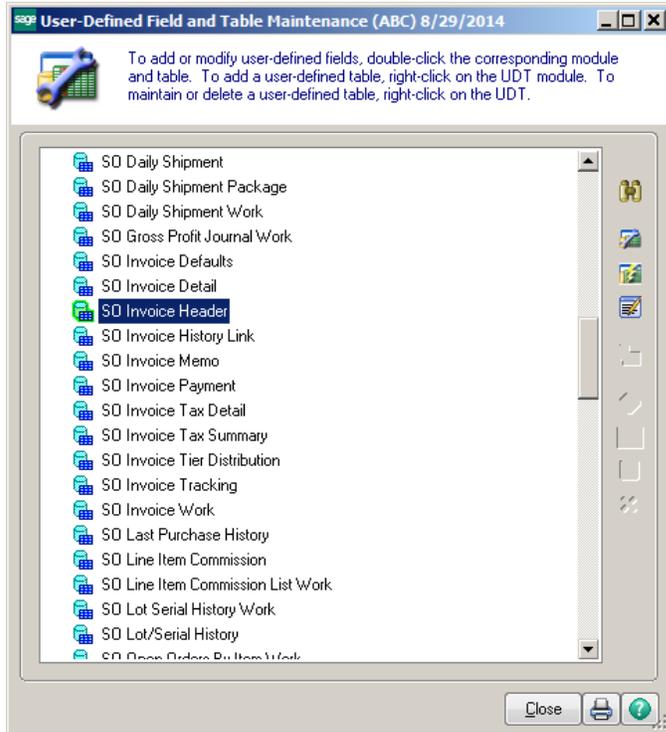
OK Cancel Update ?

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.



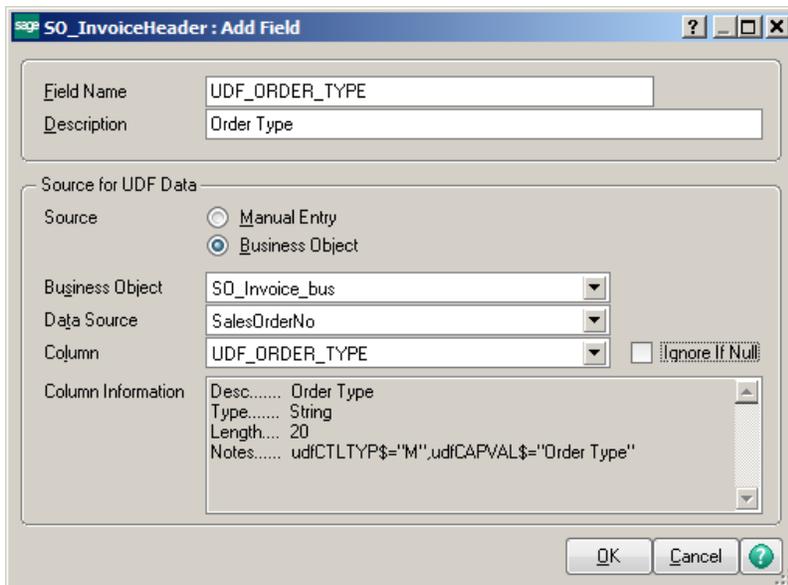
## To Add UDF to Sales Order Invoice:

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.

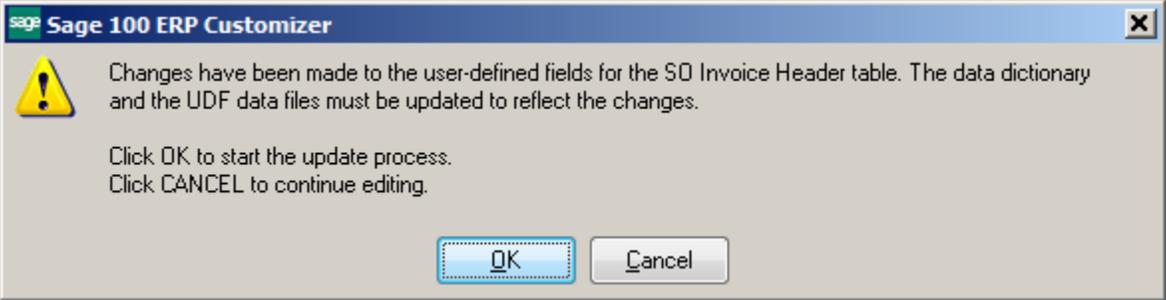
Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box  
 Data Type:  String [ Sourced ]  
 Numeric  
 Date  
 Maximum Length: 20 [ Sourced ]  
 Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]  
 Mask  
 Default Value  
 Caption: Order Type  
 Field in Use: No  
 Bytes Used: 1,491 of 20,000  
 Name Space Used: 1,748  
 Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

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

Module: Sales Order  
 Table: SO Invoice Header [ SO\_InvoiceHeader ]  
 UDFs: 1  
 Fields Used: 124 of 1,000  
 Bytes Used: 1,491 of 20,000

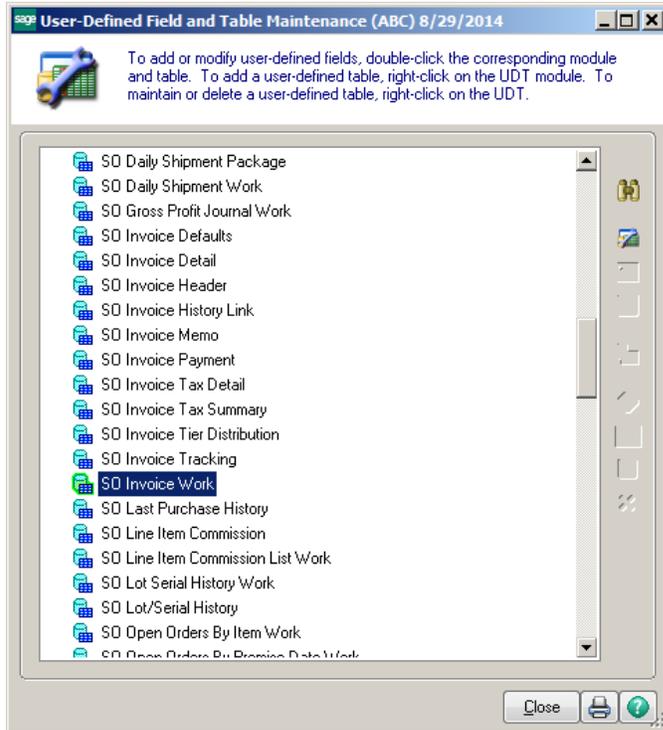
Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

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.



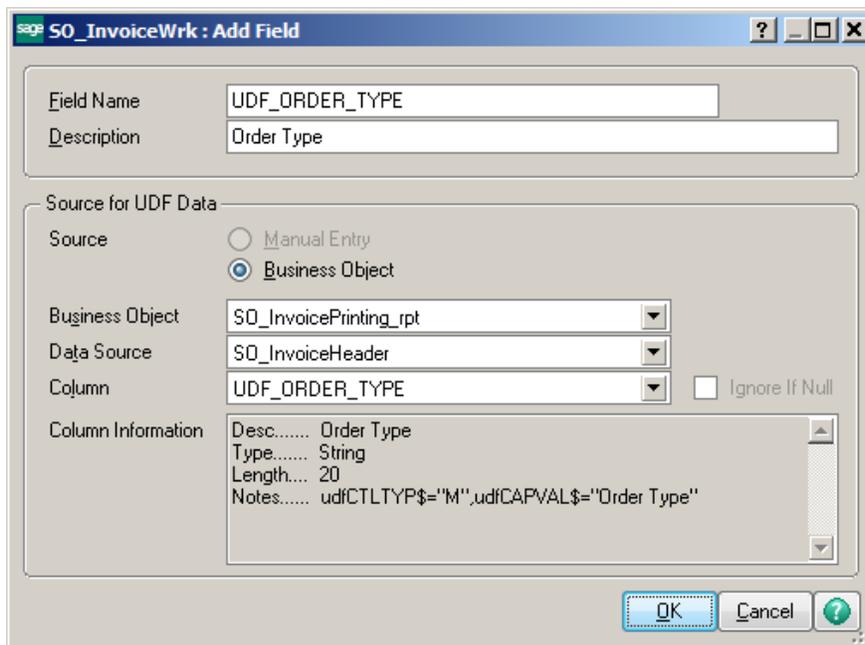
## To Add UDF to Sales Order Invoice form:

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.

**SO Invoice Work : Add Field**

Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box

Field in Use..... No  
 Bytes Used..... 9,711 of 20,000  
 Name Space Used..... 2,367

Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

1. Attributes | 2. Validation | 3. Data Sources

Data Type:  String [ Sourced ]  
 Numeric  
 Date

Maximum Length: 20 [ Sourced ]

Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]

Mask  
 Default Value  
 Caption: Order Type

OK Cancel ?

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

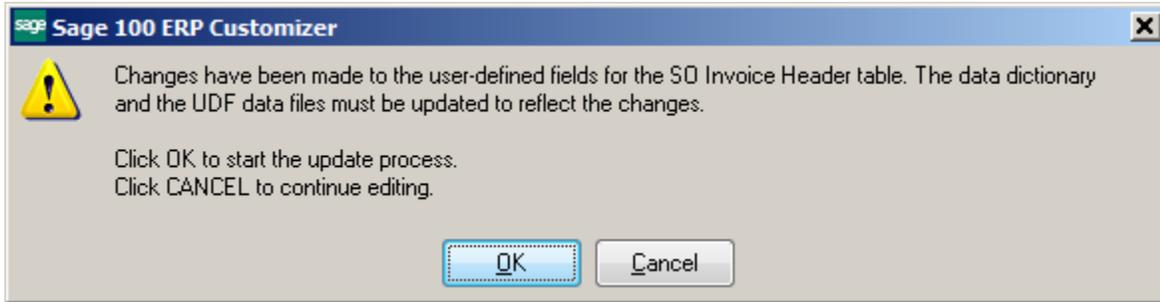
**User-Defined Fields**

Module..... Sales Order UDFs..... 1  
 Table..... SO Invoice Work Fields Used..... 187 of 1,000  
 [ SO\_InvoiceWrk ] Bytes Used..... 9,711 of 20,000

Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

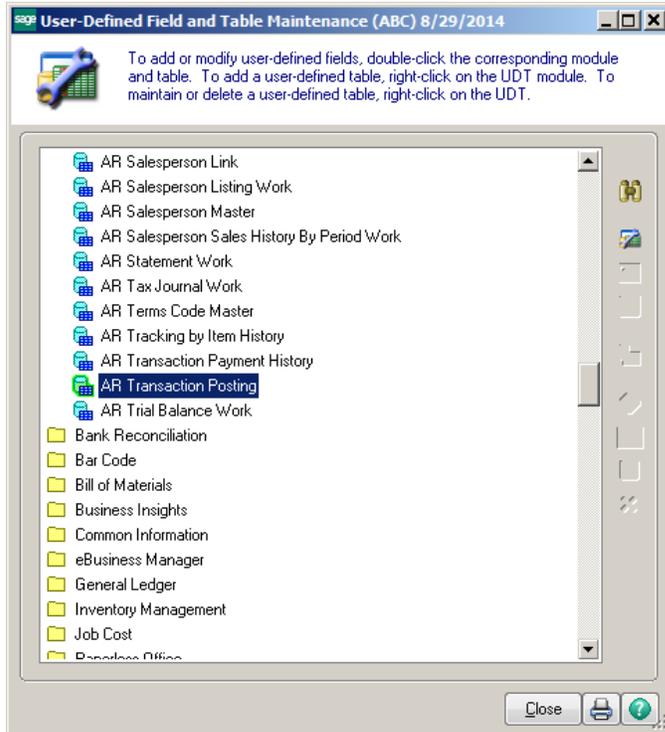
OK Cancel Update ?

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.



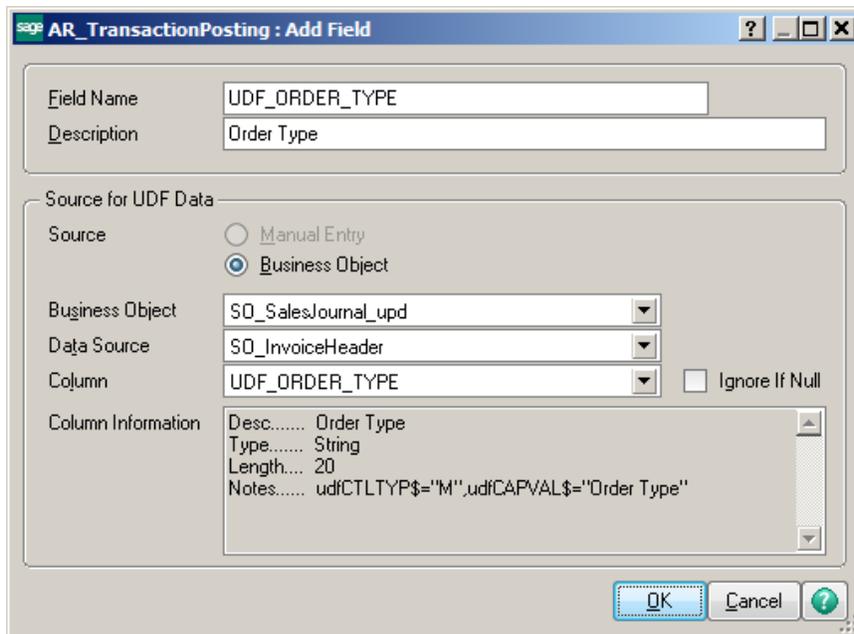
## To Post it to the AR Files:

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.

**AR Transaction Posting : Add Field**

Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box

Field in Use..... No  
 Bytes Used..... 2,059 of 20,000  
 Name Space Used..... 1,950

Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

1. Attributes | 2. Validation | 3. Data Sources

Data Type:  String [ Sourced ]  
 Numeric  
 Date

Maximum Length: 20 [ Sourced ]

Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]

Mask  
 Default Value  
 Caption: Order Type

OK Cancel ?

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

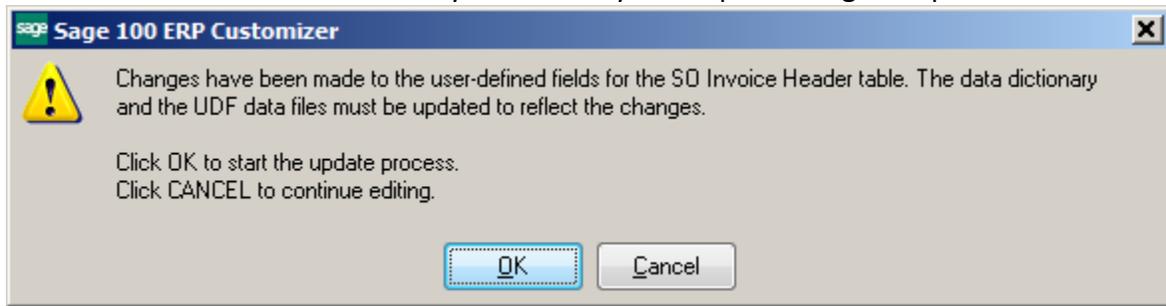
**User-Defined Fields**

Module..... Accounts Receivable UDFs..... 1  
 Table..... AR Transaction Posting Fields Used..... 133 of 1,000  
 [ AR\_TransactionPosting ] Bytes Used..... 2,059 of 20,000

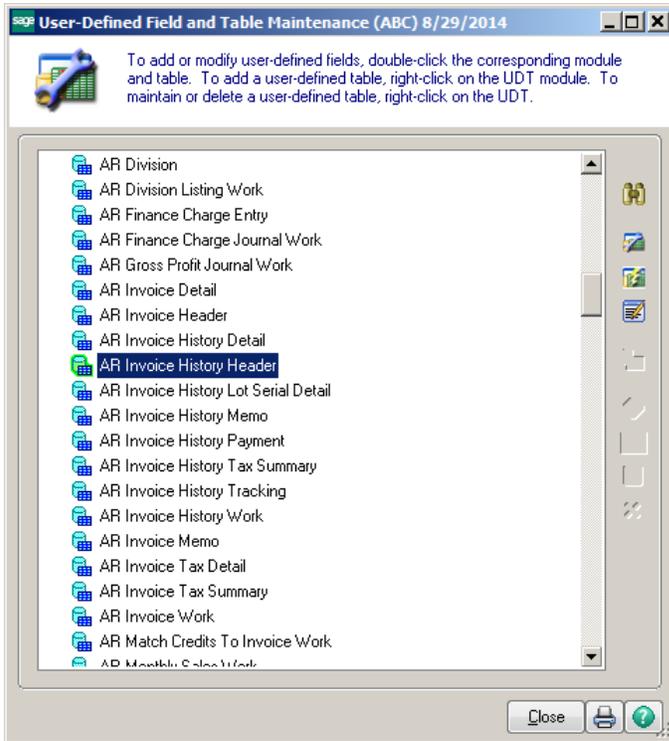
Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

OK Cancel Update ?

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.

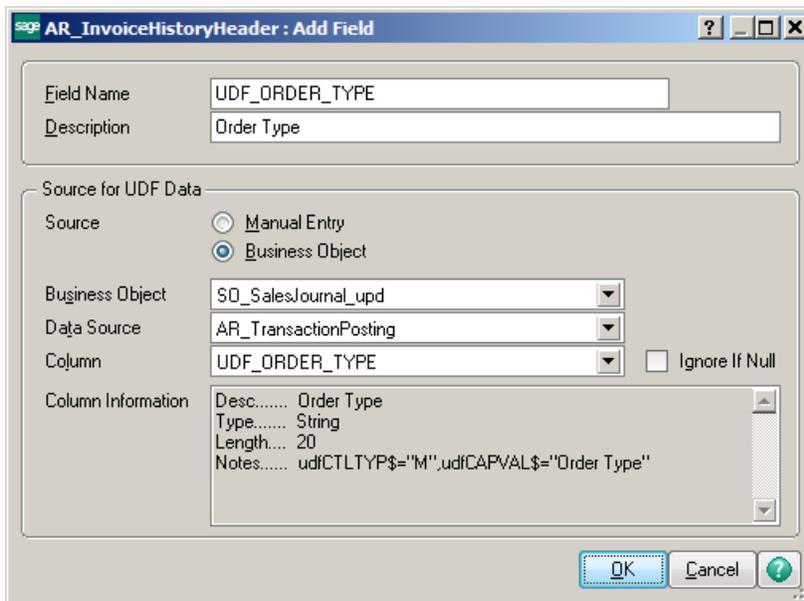


## To Add the field to the Invoice History File:



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.

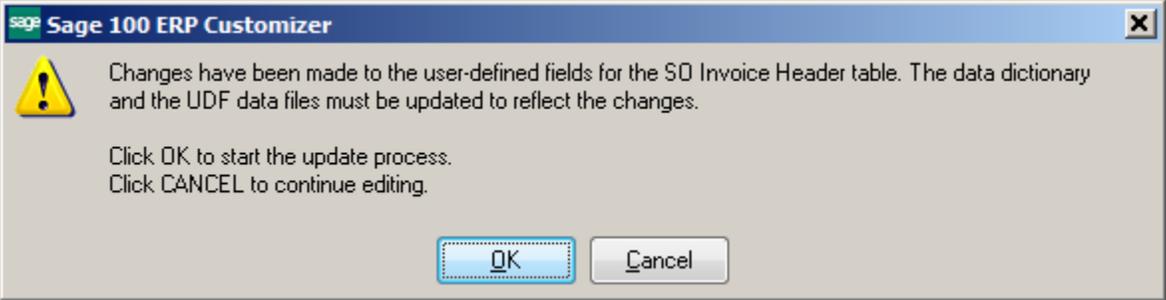
Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box  
 Data Type:  String [ Sourced ]  
 Numeric  
 Date  
 Maximum Length: 20 [ Sourced ]  
 Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]  
 Mask  
 Default Value  
 Caption: Order Type  
 Field in Use: No  
 Bytes Used: 1,396 of 20,000  
 Name Space Used: 1,358  
 Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.

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

Module: Accounts Receivable UDFs: 1  
 Table: AR Invoice History Header Fields Used: 103 of 1,000  
 [ AR\_InvoiceHistoryHeader ] Bytes Used: 1,396 of 20,000

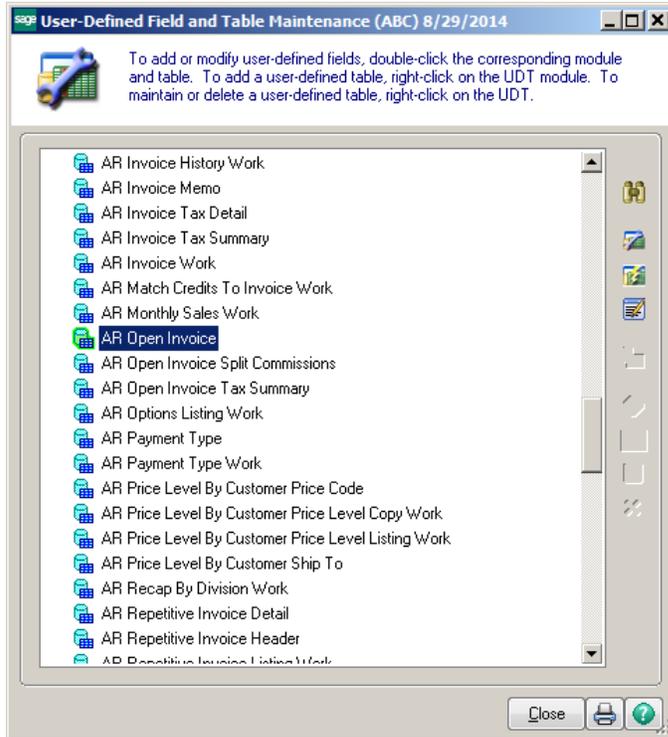
Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

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.



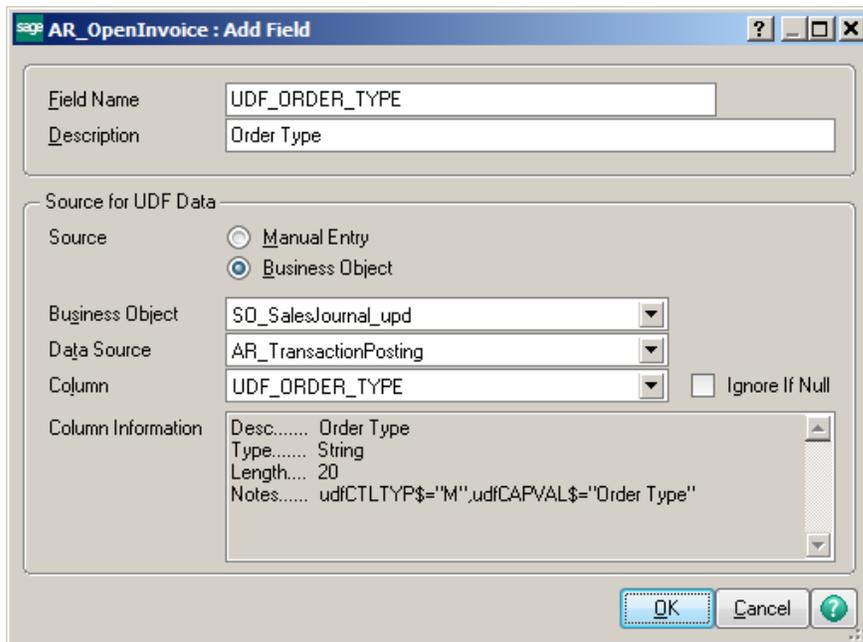
## To Add to Customer Maintenance Invoice Table:

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.

Field Name: UDF\_ORDER\_TYPE  
 Description: Order Type  
 Control Type:  Multi-Line [ Sourced ]  
 Drop-Box  
 List-Box  
 Check-Box  
 Data Type:  String [ Sourced ]  
 Numeric  
 Date  
 Maximum Length: 20 [ Sourced ]  
 Display Attributes:  Uppercase  Fixed Font  Center Text  Right-Justify  Borderless [ Sourced ]  
 Mask  
 Default Value  
 Caption: Order Type  
 Field in Use: No  
 Bytes Used: 446 of 20,000  
 Name Space Used: 522  
 Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.  
 OK Cancel ?

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

Module: Accounts Receivable UDFs: 1  
 Table: AR Open Invoice Fields Used: 39 of 1,000  
 [AR\_OpenInvoice] Bytes Used: 446 of 20,000

Field Name	Description	Type	Length
ORDER_TYPE	Order Type	Multiline	20

OK Cancel Update ?

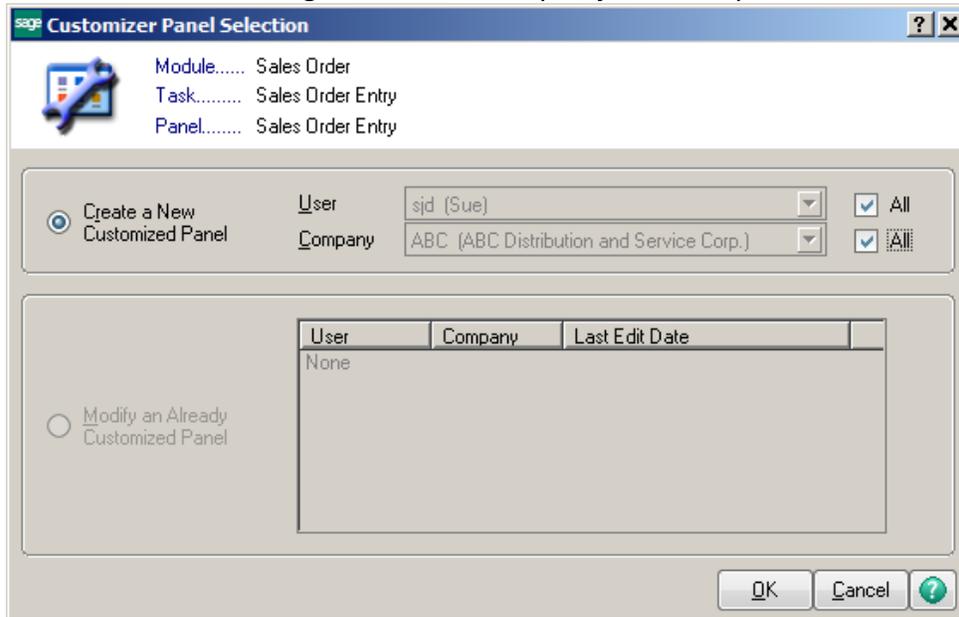
Once you click OK, the field will be added to the Data Dictionary and will be added to the table for ALL companies. All users must be out of the system when you are processing the update.



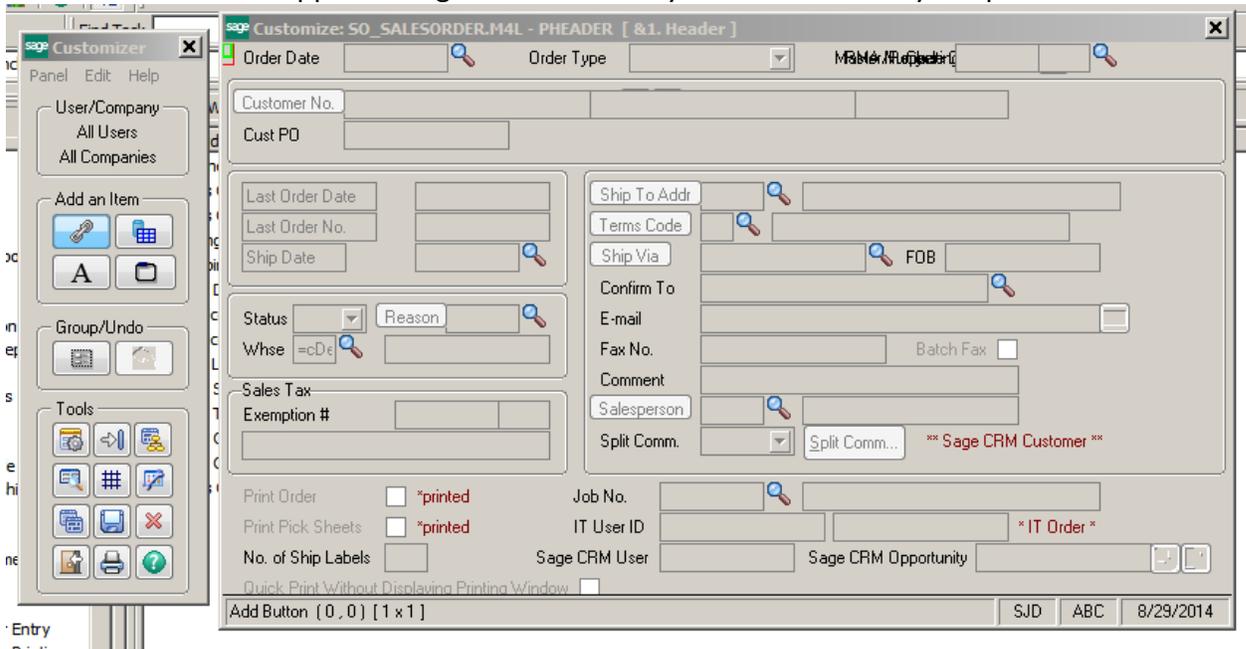
## Adding Field to Screens:

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.



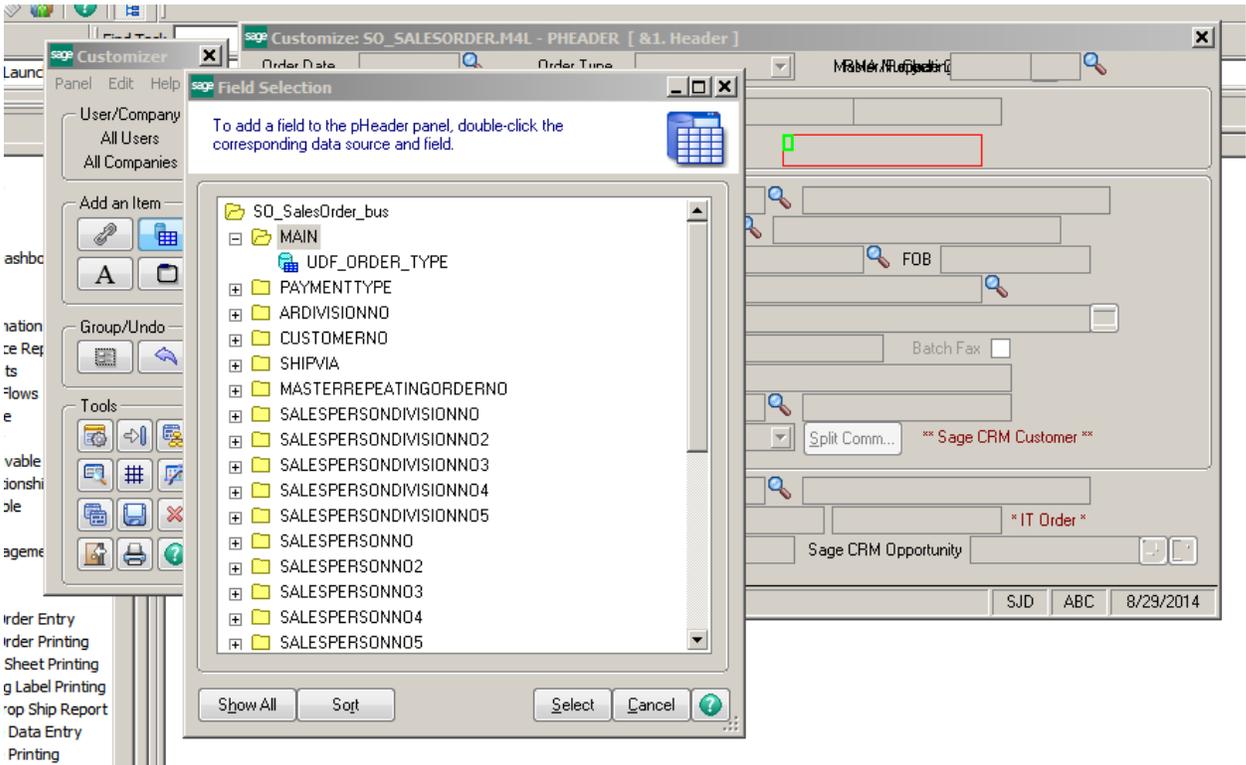
The Customizer Toolbox will appear along with the screen you were on when you opened Customizer.



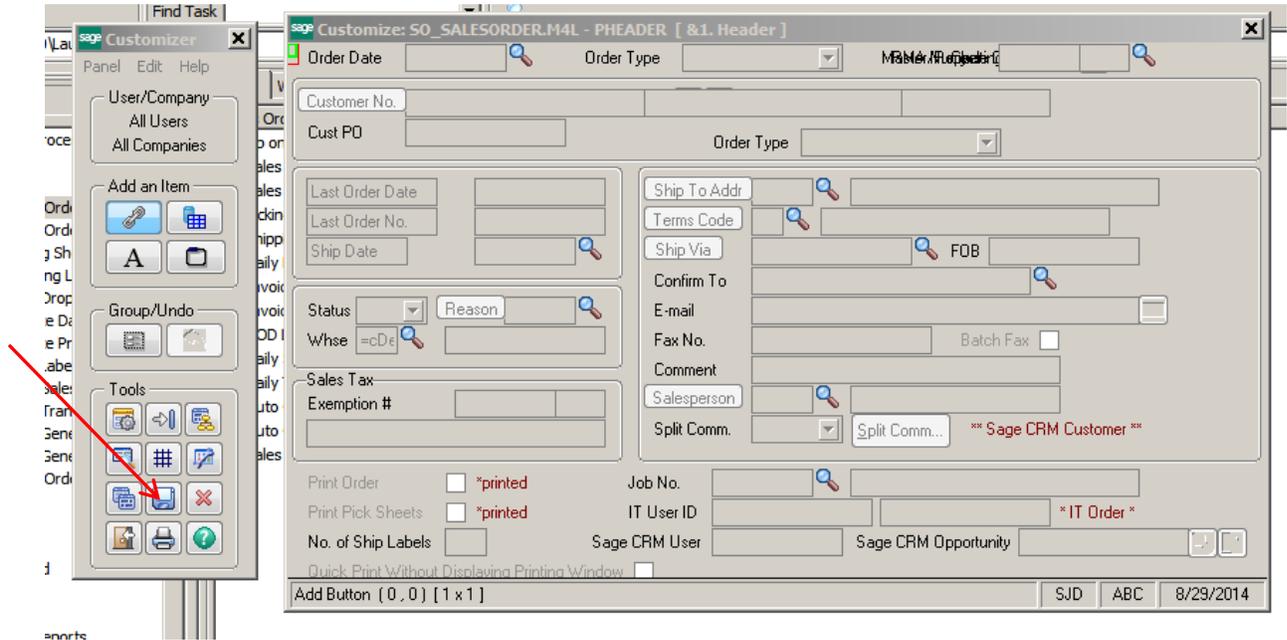
Determine where you want to add the field on the screen. Click the Add Field button on the Customizer Toolbox.



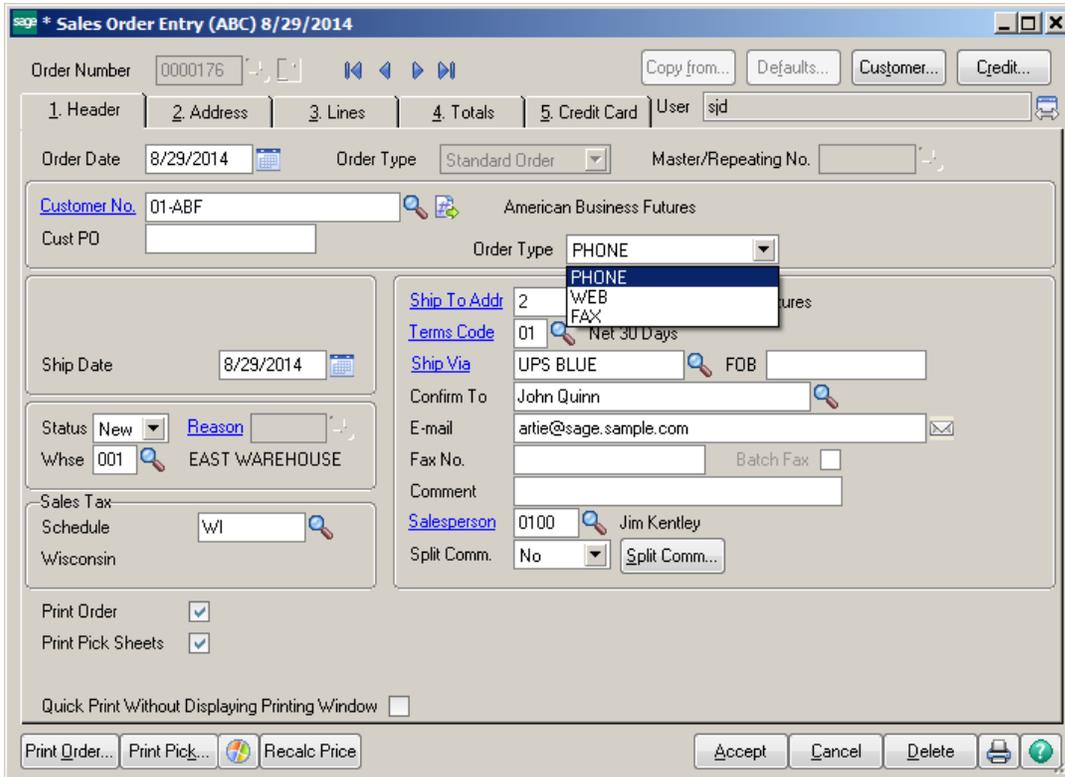
Draw the box where you want to put your field, then choose the field from the Field Selection pop-up window.



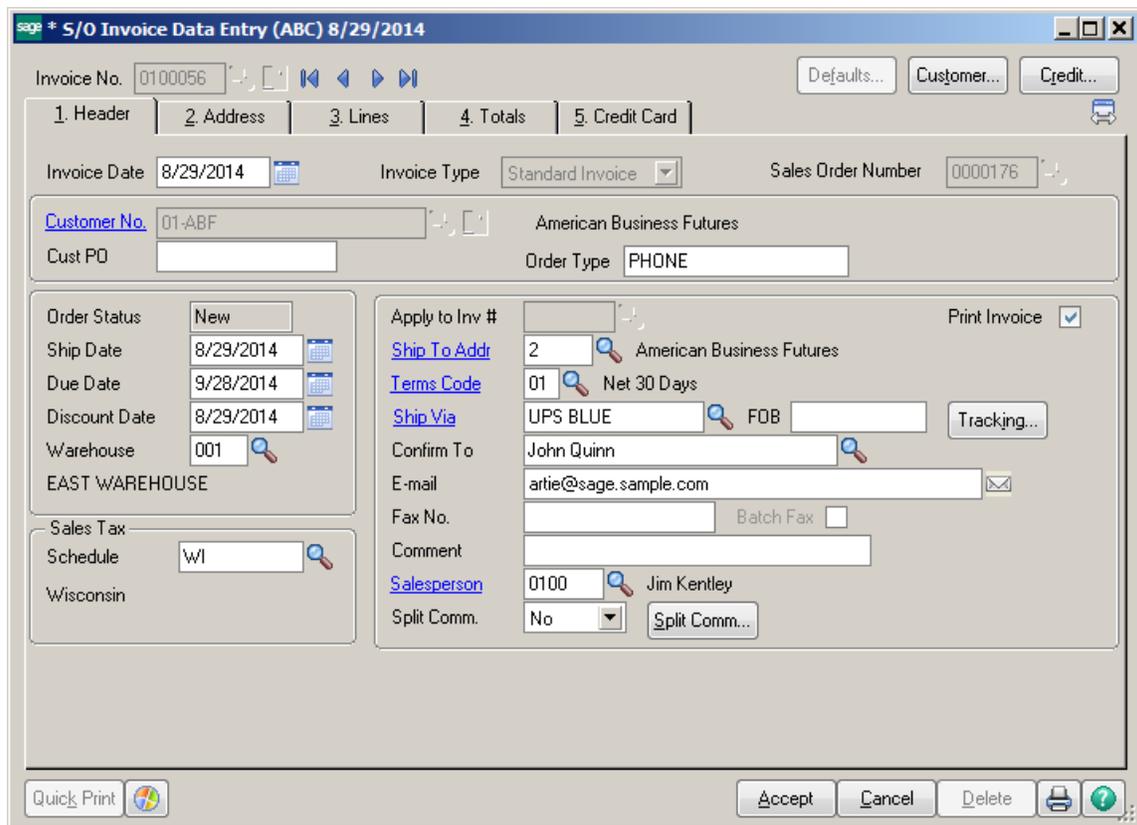
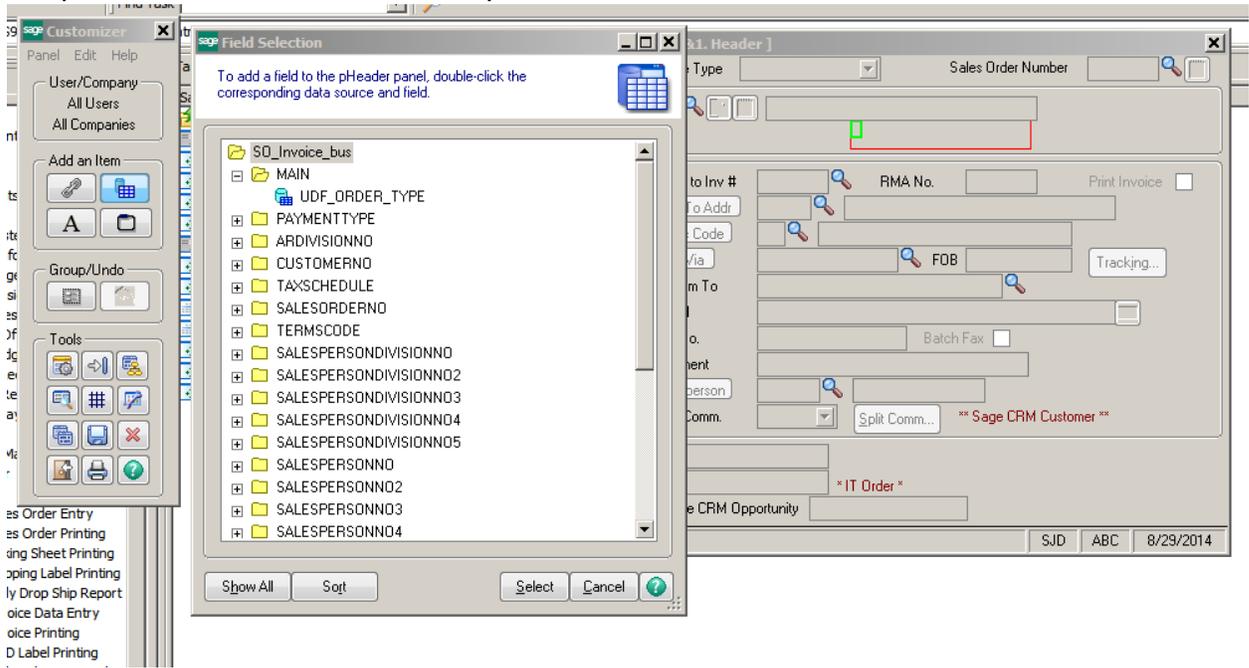
Click on the Save button.



Exit screen when done.

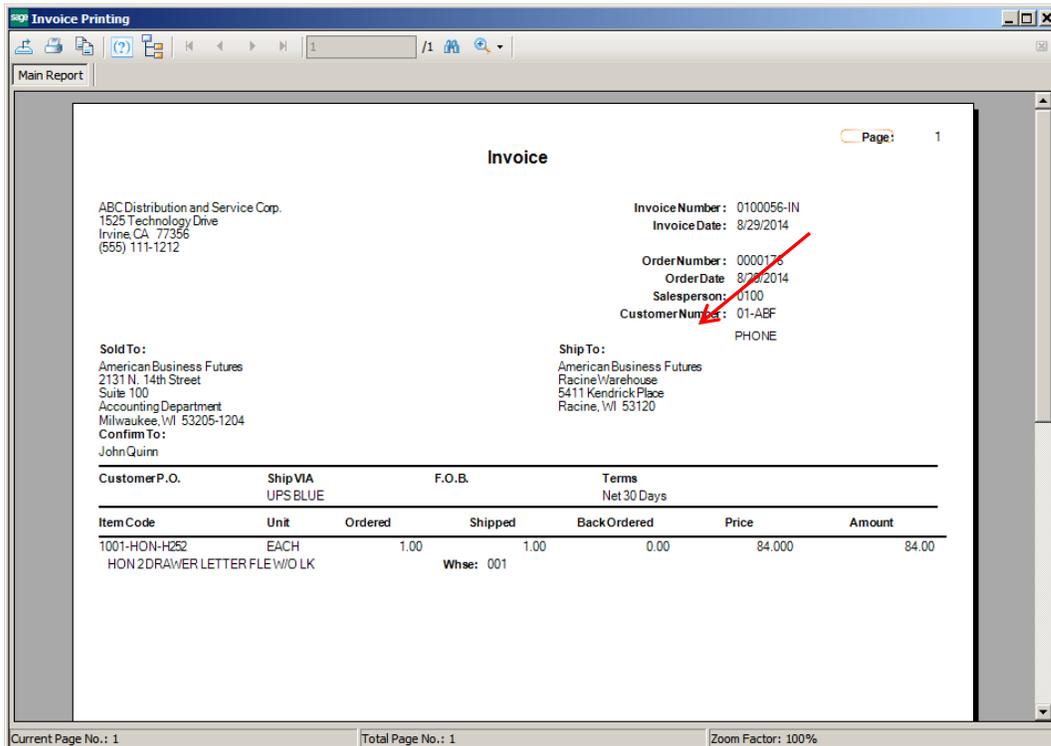
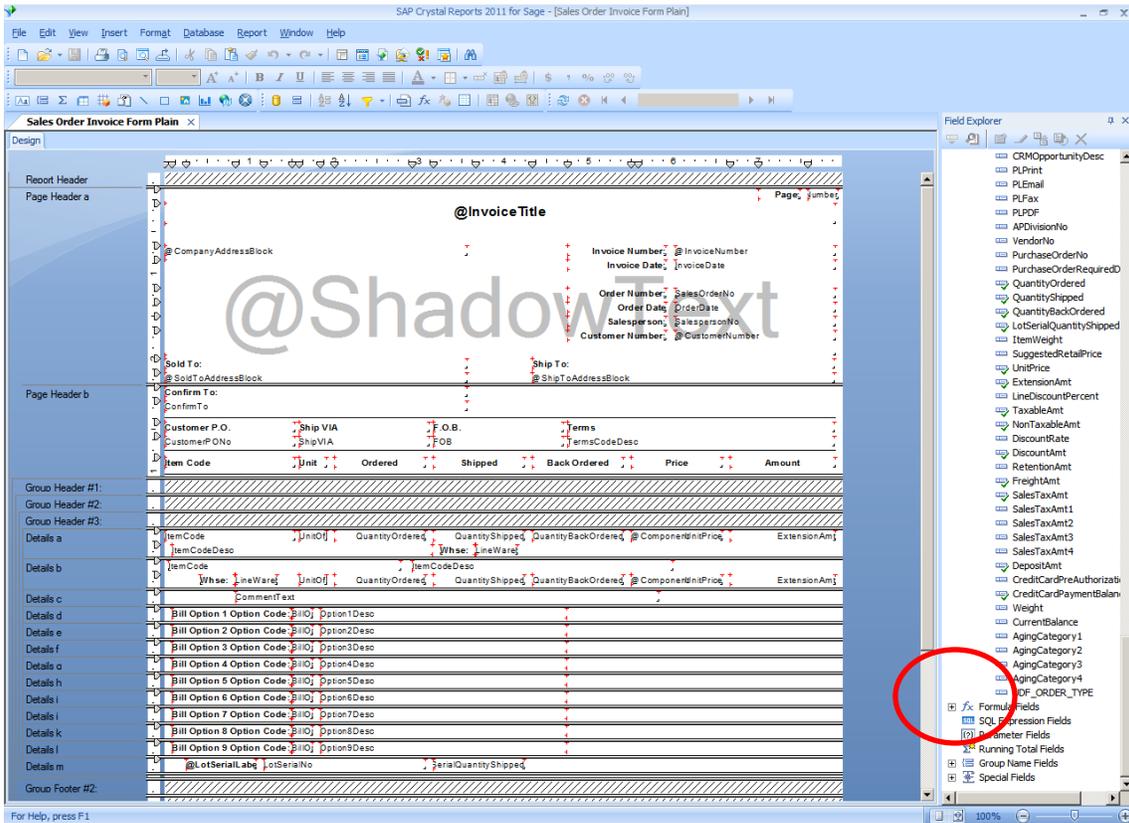


Repeat the process for the Invoice Data Entry screen.



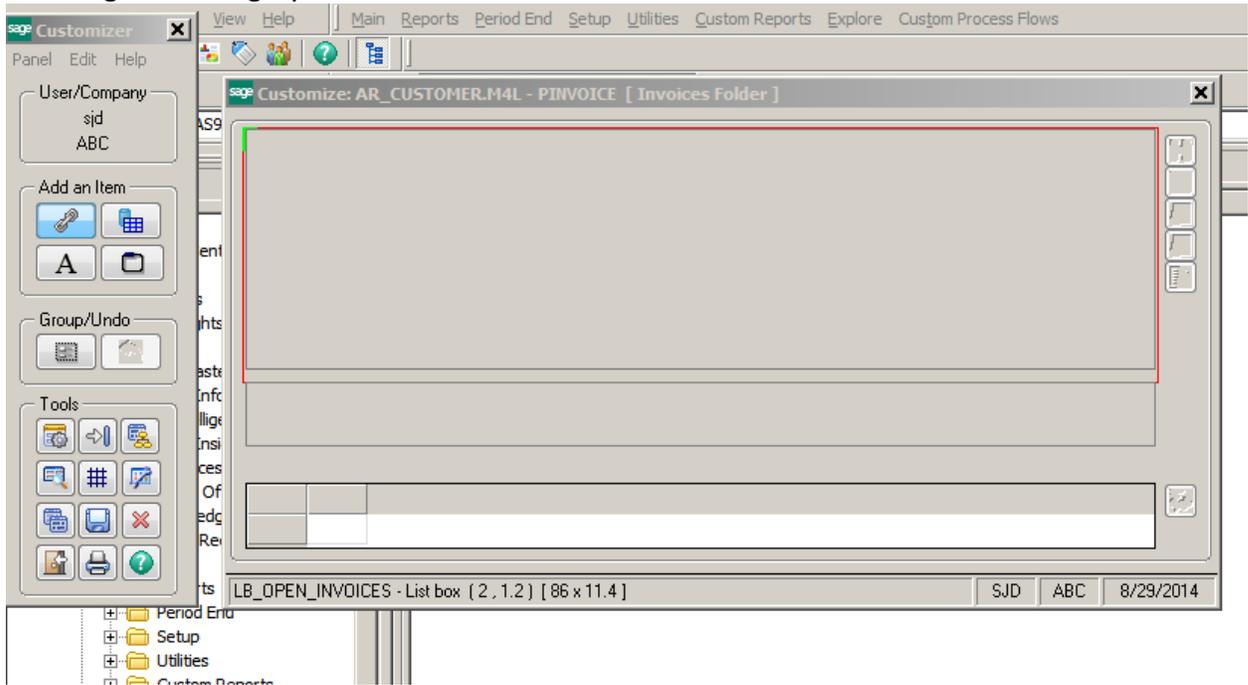
## To Add field to Actual Form:

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.

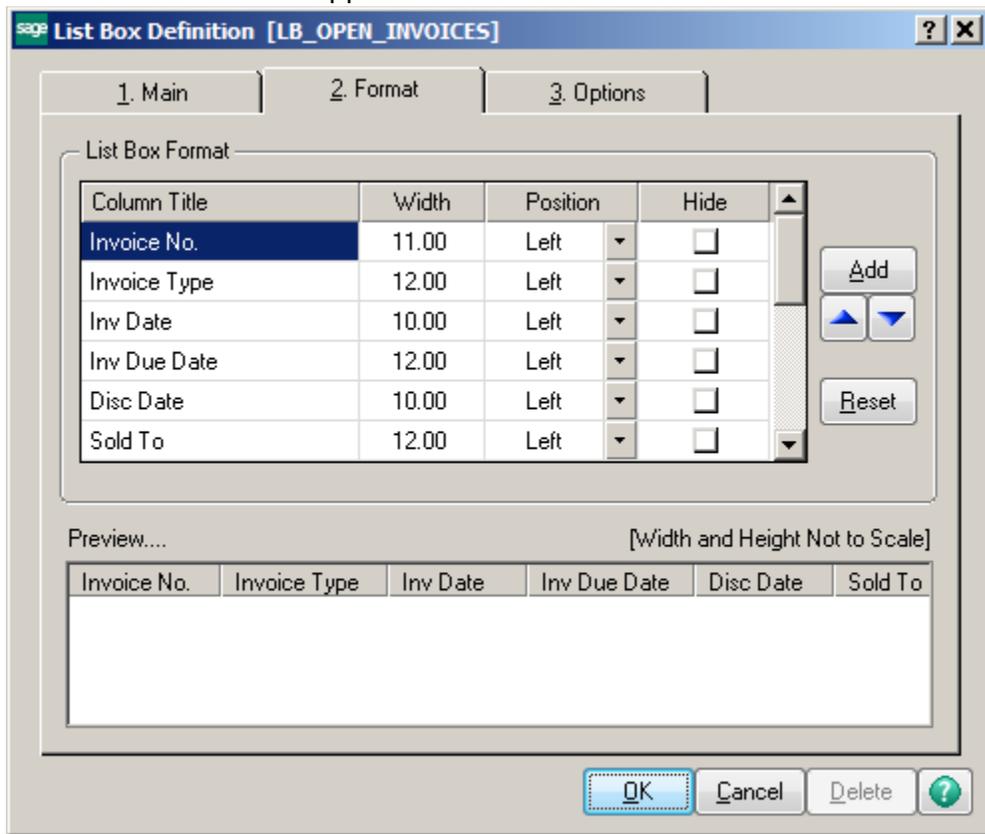


**Add field to Customer Maintenance screen:**

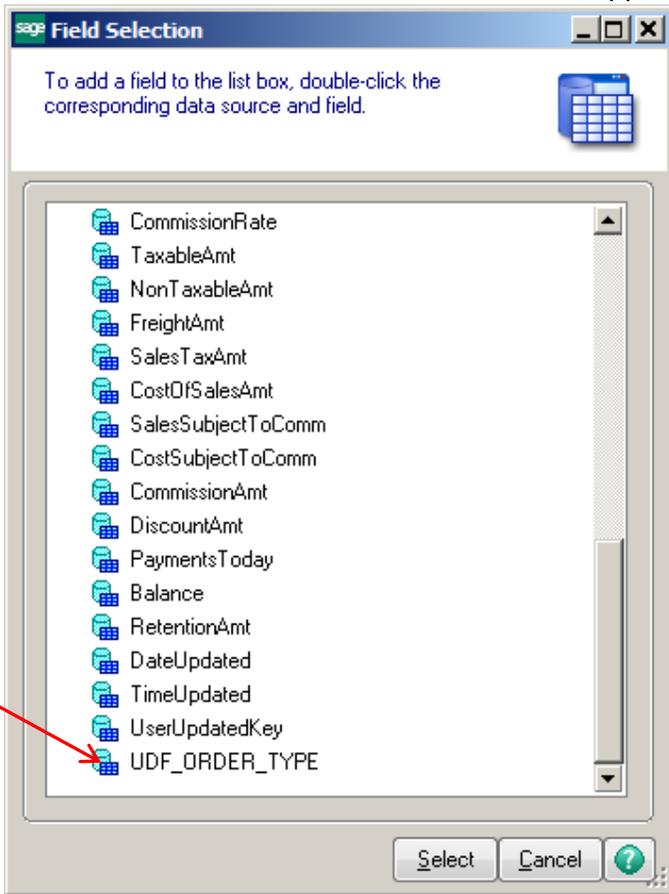
Open Customer Maintenance. Select the Invoices tab. Right click, choose Panel Settings and Customizer. Right click in gray box.



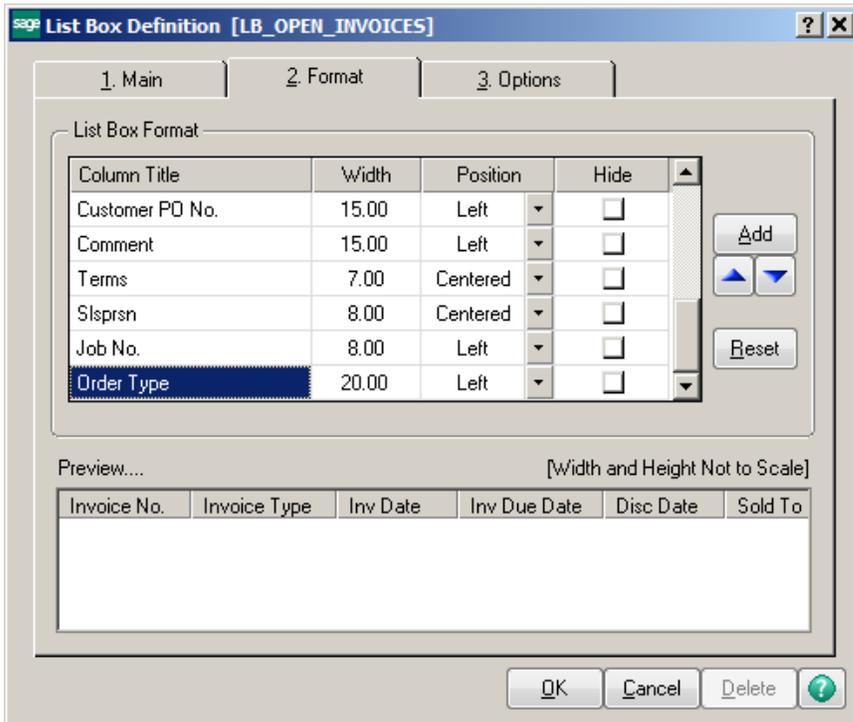
The List Box Definition box will appear. Click on the Format Tab.



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.

sage \* Customer Maintenance (ABC) 8/29/2014

Customer No. 01-ABF    Copy From...    Renumber...    More...

Name American Business Futures

1. Main    2. Additional    3. Statistics    4. Summary    5. History    6. Invoices    7. Transactions    8. S/Os

Disc Date	Amount	Discount	Balance	Order Type	Customer PO No.	
	84.00	0.00	84.00	PHONE		
	2,416.25	0.00	0.00			M
	38.20	0.00	38.20		789	
	130.00	0.00	130.00		789	
	2,416.25	0.00	0.00			M
	265.86	0.00	0.00			R
	666.53	0.00	0.00			R
	2,032.54	0.00	0.00			R
	864.25	0.00	0.00			S

Trans Date	Trans Type	Trans Amount	Pay Date	Check No.	Payment Ref	Cr Card	RMA N
8/29/2014	Invoice	84.00					

Balance	Current	30 Days	60 Days	90 Days	120 Days
5,816.36	5,816.36	0.00	0.00	0.00	0.00

Accept    Cancel    Delete    [Print]    [Help]