# 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.

User-Defined	Field and Table Maintenance (ABC) 8/28/2014	_ 🗆
ar m	o add or modify user-defined fields, double-click the corresponding m nd table. To add a user-defined table, right-click on the UDT module. aintain or delete a user-defined table, right-click on the UDT.	odule To
Accounts	Payable	7
🔲 Accounts	Receivable	ា
🛄 Bank Rec	onciliation	
🛅 Bar Code		
🛅 Bill of Mat	erials	-
🔲 Business I	Insights	
🛄 Common I	nformation	
📋 eBusiness	Manager	_
🛄 General L	edger	
📋 Inventory	Management	,
🛅 Job Cost		1.7
🔲 Paperless	Office	
🛄 Payroll		[
📋 Purchase	Order	
🔲 Return Me	erchandise Authorization	65
🛅 Sales Ord	er	
🔲 Work Ord	er	
🛄 System Ta	ables	
🔲 [Recent]		

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.

🤓 User-Defi	ned Fields	
<b>7</b>	Module Sales Order Table SO Sales Order Header [ SO_SalesOrderHeader ]	UDFs0 Fields Used 105 of 1,000 Bytes Used 1,336 of 20,000
Field Nam	e Description	Type Length
		<u></u>

# Enter the new field name, click OK.

SO_SalesOrderHe	der : Add Field ? _ 🗆 🗙
<u>F</u> ield Name	UDF_ORDER_TYPE
Source	<u>Manual Entry</u>
Business Object	Business Object
Data Source	
Column Column Information	
	<u>v</u>
~	<u>DK</u> <u>Cancel</u>

## 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).

O Sales Order H Field Name	leader: Add Field UDF_ORDER_TYPE	?
De <u>s</u> cription	Order Type	Bytes Used 1,356 of 20,000
Control Type	Multi-Line     Image: Constraint of the second secon	Name Space Used 1,481 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.
<u>1</u> . Attributes	2. Validation 3. Data Sources	
Data Type Maximum <u>L</u> eng Display Attribut	String     Numeric     Date     Date     Dete     String     Date     Date     Dete     Detete     Detete     Detetee     Detete     Detetet     Detetee     Det	lerless
Mask Dgfault Va ✓_Caption	lue Type	
		<u> </u>

#### 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.

0 Sales Order He	eader: Add Field		? _ [
Eield Name	IDF_ORDER_TYPE Drder Type MultiLine Drop-Box List-Box Check_Box 2. Validation 3. D	ata Sources	Field in Use
<u>N</u> one <u>R</u> ange List	PHONE WEB FAX	ough	
Reguired Field			
			<u> </u>

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.

🤓 User-Defi	ned Fields				
<b>7</b>	Module Sales Ord Table SO Sales [SO_Sale	er Order Header esOrderHeader ]	UDFs Fields Used Bytes Used	1 106 of 1,000 1,356 of 20,000	
Field Nam	ie TYPE	Description Order Type	Type Drop Box	Length 20	
` <u> </u>			<u> </u>	Cancel Upda	ate 🕜 👔

<sup>sage</sup> Sage	e 100 ERP Customizer	×
⚠	Changes have been made to the user-defined fields for the SO Sales Order 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.	

Select the SO Sales Order Work table.

Ż	To add or modify user-defined fields, double-click the correspon- and table. To add a user-defined table, right-click on the UDT n maintain or delete a user-defined table, right-click on the UDT.	ding module nodule. To	
🔒 Si	) Sales History		
🖷 SC	) Sales Journal Work	1	6
🔒 S(	) Sales Order Defaults	6	
🔒 SC	) Sales Order Detail	5	Ż
🔒 SC	) Sales Order Header		
🔒 SC	) Sales Order History Detail	-	
🔒 SC	) Sales Order History Header		
🔒 SC	) Sales Order History Memo		
🔒 SC	) Sales Order History Payment		-
🔒 SC	) Sales Order History Tax Summary		,
🔒 SC	) Sales Order Memo	r í	
🔒 S(	) Sales Order Payment		
🔒 S(	) Sales Order Quote History Work	ſ	
🔒 S(	) Sales Order Recap		
🔒 S(	) Sales Order Tax Detail		2
🔒 SC	) Sales Order Tax Summary		
🔒 S(	) Sales Order Tier Distribution		
🔒 SC	) Sales Order Work		
🔒 S(	) Sales Recap By Division Work		
🔒 SC	) Sales Recap By Product Line Work		
er 🤗	Colos Piscop Pult (probouso Product Line ) ( fork	-	

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

<u>F</u> ield Name	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
Source for UDF Data	
Source	O Manual Entry
	Business Object
Bu <u>s</u> iness Object	S0_SalesOrderPrinting_rpt
Da <u>t</u> a Source	SO_SalesOrderHeader
Column	UDF_ORDER_TYPE
Column Information	Desc Order Type Type String Length 20 Notes udfCTLTYP\$="M".udfCAPVAL\$="Order Type"

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.

50 Sales Order Work	Add Field	2 _ [
Field Name     UDF_       Description     Order       Control Type     Image: Margin of the second seco	ORDER_TYPE Type] ulti-Line Surced] rop-Box St-Box st-Box Mathematical heck-Box Mathematical	Field in Use
<u>1</u> . Attributes	2. Validation <u>3</u> . Data Sources	
Data Type	String     [Sourced]     Numeric     Date	
Maximum <u>L</u> ength	20 = [Sourced]	
Display Attributes	Uppercase Fixed Font Center Text Right-Justify Border	less [Sourced]
<u>M</u> ask D_fault Value C_aption	Order Type	
		<u> </u>

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

🤓 User-Defi	ned Fields				<u>_   X</u>
<b>Z</b>	Module Sales Ord Table SO Sales [SO_Sale	er Order Work ssOrderWrk]	UDFs Fields Used Bytes Used	1 192 of 1,000 9,737 of 20,000	
Field Nam	e YPE	Description Order Type	Type Multiine	Length 20	
<u>`</u>			<u>o</u> k	<b><u>C</u>ancel</b> <u>U</u> pda	ite 🕜



#### To Add UDF to Sales Order Invoice:

Select the SO Invoice Header table.

-	To add or modify user-defined fields, double-click the corresponding m	odule
μ	and table. To add a user-defined table, right-click on the UDT module maintain or delete a user-defined table, right-click on the UDT.	e To
🔒 SC	Daily Shipment	<b>▲</b>
🔚 SC	) Daily Shipment Package	- 1
🖷 SC	Daily Shipment Work	UT UT
🖷 SC	) Gross Profit Journal Work	
🖷 SC	) Invoice Defaults	
🖬 SC	) Invoice Detail	
🔒 SC	) Invoice Header	
🖬 SC	) Invoice History Link	
🖬 SC	) Invoice Memo	
🖬 SC	) Invoice Payment	
🖬 SC	) Invoice Tax Detail	- 1
🖬 SC	) Invoice Tax Summary	
🖬 SC	Invoice Tier Distribution	r
🛱 SC	) Invoice Tracking	- I - I
🛱 SC	) Invoice Work	1
🛱 SC	) Last Purchase History	
🛱 SC	) Line Item Commission	
🛱 SC	) Line Item Commission List Work	
🛱 SC	) Lot Serial History Work	
🖬 SC	Lot/Serial History	
no 🤗	) Open Orders Pullton ) / ork	▼

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

<sup>8398</sup> 50_InvoiceHeade	r : Add Field ? 📃 🗙
<u>F</u> ield Name	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
- Source for UDF Data	
Source	O Manual Entry
	Business Object     Direct     Direc
Bu <u>s</u> iness Object	SO_Invoice_bus
Da <u>t</u> a Source	SalesOrderNo
Column	UDF_ORDER_TYPE
Column Information	Desc Order Type  Type String Length 20 Notes udfCTLTYP\$="M",udfCAPVAL\$="Order Type"
·	<u>D</u> K <u>Cancel</u>

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.

ORDER_TYPE Type ulti-Line [Sourced] rop-Box [Sourced] st-Box []	Field in Use         No           Bytes Used         1,491 of 20,000           Name Space Used         1,748
rop-Box 📰 st-Box 📑	
nec <u>k</u> -Box 🛛 <u>A</u>	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.
2. Validation <u>3</u> . Data Sources	
String     [Sourced]     Numeric     Date	
20 # [Sourced]	
Uppercase Fixed Font Center Text Right-Justify B	Borderless [Sourced]
Order Type	
	2. Validation     3. Data Sources       ③ String     [Sourced]       Numeric     Data       20 2     [Sourced]       Uppercase     Fixed Font       Center Text     Right-Justify

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

sage	User-Defin	ed Fields							<u>_   X</u>
	7	Module Table	Sales Orde SO Invoice [SO_Invoi	r Header ceHeader]	UD Fiel Byte	Fs ds Used es Used	1 124 of 1,/ 1,491 of :	000 20,000	
	Field Name ORDER_T	; /PE		Description Order Type	<u>Tı</u> Mı	ype ultiline	Length 20		
						<u>0</u> K	<u>C</u> ancel	<u>U</u> pda	te 🕜 ;



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

<sup>sege</sup> 50_InvoiceWrk : A	Ndd Field
Field Name	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
- Source for UDF Data	
Source	O Manual Entry
	<u>B</u> usiness Object
Business Object	S0_InvoicePrinting_rpt
Da <u>t</u> a Source	S0_InvoiceHeader
Column	UDF_ORDER_TYPE
Column Information	Desc Order Type  Type String Length 20 Notes udfCTLTYP\$="M",udfCAPVAL\$="Order Type"
	<u>K</u> ancel

#### 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.

50 Invoice Work:Ad	d Field	?_0
Eield Name UDF Description Order Control Type O M C L	ORDER_TYPE Type ulti-Line [Sourced] rop-Box [Sourced] st-Box [An address of the state of the	Field in Use
<u>1</u> . Attributes	2. Validation 3. Data Sources	
Data Type	<ul> <li></li></ul>	
Maximum Length Display Attributes	20      [Sourced]       Uppercase     Fixed Font     Center Text     RightJustify	less [Sourced]
<u>M</u> ask Dgfault Value ✔Caption	Crder Type	
·		QK Cancel

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

🤓 User-Defin	ed Fields				<u>_   ×   ×</u>
7	Module Sale Table SO I [SO]	s Order nvoice Work _InvoiceWrk ]	UDFs Fields Used Bytes Used	1 187 of 1,000 9,711 of 20,000	
Field Name	3 YPE	Description Order Type	Type Multiline	Length 20	
` <u> </u>			<u></u> K	<u>C</u> ancel Upda	ite 🕜

<sup>sage</sup> Sage	e 100 ERP Customizer	×
⚠	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.	
	<u> </u>	

#### 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

<sup>sege</sup> AR_TransactionPo	osting : Add Field ? 📃 🗆 🗙
<u>F</u> ield Name	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
- Source for UDF Data	
Source	O Manual Entry
	Business Object
Bu <u>s</u> iness Object	S0_SalesJournal_upd
Da <u>t</u> a Source	S0_InvoiceHeader
Cojumn	UDF_ORDER_TYPE   Ignore If Null
Column Information	Desc Order Type Type String Length 20 Notes udfCTLTYP\$="M",udfCAPVAL\$="Order Type"
·	QK Cancel

# 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 Posti	ng: Add Field	<u>? _D</u>
Field Name     UDF_       Description     Index       Control Type     M       Control Type     L       Control Type     C	ORDER_TYPE  Ivpe  Lulti-Line  Sourced  rop-Box  StBox  heck-Box  A	Field in Use       No         Bytes Used
<u>1</u> . Attributes	2. Validation <u>3</u> . Data Sources	
Data Type	String     [Sourced]     Numeric     Date	
Maximum <u>L</u> ength	20 = [Sourced]	
Display Attributes	Uppercase Fixed Font Center Text Right-Justify Border	ess [Sourced]
<u>M</u> ask Dgfault Value Caption	Urder Type	
l		

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

🔓 User-Defir	ed Fields					
<b>7</b>	Module Accounts Table AR Trans [AR_Tran	Receivable action Posting IsactionPosting ]	UD Fie Byt	IFs Ids Used tes Used	1 133 of 1,000 2,059 of 20,00	0
Field Name	3 YPE	Description Order Type	T M	ype ultiline	Lenqth 20	
				<u> </u>	Cancel Up	date 🕜



🤓 User-Defi	ned Field and Table Maintenance (ABC) 8/29/2014	<u> </u>
<b>7</b>	To add or modify user-defined fields, double-click the corresponding modu and table. To add a user-defined table, right-click on the UDT module. T maintain or delete a user-defined table, right-click on the UDT.	ile o
AI	a Division	
📕 🖬 AF	R Division Listing Work	ങ
📕 🔒 AF	R Finance Charge Entry	9.0
🔒 🔒 Al	R Finance Charge Journal Work	<b>1</b>
🔒 🔒	R Gross Profit Journal Work	-
🔒 🔒 Af	R Invoice Detail	
🗧 🔒 Ał	R Invoice Header —	1
🔒 🔒 Al	R Invoice History Detail	
📄 🔒 🔒	R Invoice History Header	
📄 🔒 🔒	R Invoice History Lot Serial Detail	,
📄 🛛 🔒 Ał	R Invoice History Memo	~
📄 🔒 🔒	R Invoice History Payment	
🔰 🔒 Ał	R Invoice History Tax Summary	r I
🔰 🔒 Af	R Invoice History Tracking	
🔰 🔒 Af	R Invoice History Work	- 22
🔰 🔒 Ał	R Invoice Memo	
👘 🔒 Af	R Invoice Tax Detail	
📃 🛛 🔒 Af	R Invoice Tax Summary	
👘 🔒 Af	R Invoice Work	
🔒 🔒 Ał	R Match Credits To Invoice Work	
A 🖳	P Monthlu Colos V /ork	
<u> </u>		
		• <b>(</b> )

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

<sup>e</sup> AR_InvoiceHistor	yHeader : Add Field
<u>F</u> ield Name	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
Source for UDF Data	
Source	🔿 <u>M</u> anual Entry
	Business Object
Bu <u>s</u> iness Object	S0_SalesJournal_upd
Da <u>t</u> a Source	AR_TransactionPosting
Column	UDF_ORDER_TYPE Ignore If Null
Column Information	Desc Order Type Type String Length 20 Notes udfCTLTYP\$="M",udfCAPVAL\$="Order Type"
	<u>K</u> ancel

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 Invoice History H	eader: Add Field	<u>? _ </u>
Eield Name UDF Description Drde Control Type O L O L	_ORDER_TYPE r Type fulti-Line IS [Sourced] Prop-Box IS ist-Box IS theok-Box ISA	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.
<u>1</u> . Attributes	<u>2</u> . Validation <u>3</u> . Data Sources	<u></u>
Data Type	String     [Sourced]     Numeric     Date	
Maximum Length Display Attributes	20 [Sourced]	ss [Sourced]
<u>M</u> ask Dgfault Value ✔ C <u>a</u> ption		
		<u> </u>

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

4	🤓 User-Defin	ied Fields					<u>_   X</u>
	<b>Z</b>	Module Ac Table AR [A	counts Receivable Invoice History Header R_InvoiceHistoryHeader ]	UD Fie Byt	IFs Ids Used ies Used	1 103 of 1,000 1,396 of 20,000	
	Field Name	3 YPE	Description Order Type	T Mi	vpe	Length 20	
	τ <u></u>				<u>O</u> K	<u>Cancel</u> Upda	te 🕐



Select the AR Open Invoice table.

Ż	To add or modify user-defined fields, double-click the corre and table. To add a user-defined table, right-click on the U maintain or delete a user-defined table, right-click on the UI	sponding module IDT module, To DT,	9
- 	3 Invoice History Work		
A 📾	Invoice Memo	-	æ
AF	B Invoice Tax Detail		J
AF	R Invoice Tax Summary		2
AF	R Invoice Work		_
AF	R Match Credits To Invoice Work		1¢
🔒 AF	8 Monthly Sales Work		7
🔒 AF	Open Invoice		
🔒 AF	R Open Invoice Split Commissions		1-
🔒 AF	Popen Invoice Tax Summary		
🔒 AF	P Options Listing Work		1
🔒 AF	R Payment Type		
🔒 AF	Payment Type Work		r
🔒 AF	Price Level By Customer Price Code		
🔒 AF	Price Level By Customer Price Level Copy Work		8
🔒 🗛	Price Level By Customer Price Level Listing Work		
🔒 🔒	Price Level By Customer Ship To		
🔒 AF	Recap By Division Work		
🔒 🔒	Repetitive Invoice Detail		
🔒 🔒	Repetitive Invoice Header		
🗎 A I	Papatitius Invoice Listing Mark	•	

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

<sup>8399</sup> AR_OpenInvoice :	Add Field
	UDF_ORDER_TYPE
<u>D</u> escription	Order Type
Source for UDF Data	
Source	<ul> <li><u>M</u>anual Entry</li> <li><u>B</u>usiness Object</li> </ul>
Bu <u>s</u> iness Object	S0_SalesJournal_upd
Da <u>t</u> a Source	AR_TransactionPosting
Column	UDF_ORDER_TYPE Ignore If Null
Column Information	Desc Order Type Type String Length 20 Notes udfCTLTYP\$="M",udfCAPVAL\$="Order Type"
·	<u>K</u> ancel

#### 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 Open Invoice : A	dd Field	2
Eield Name UDF Description Ord Control Type O O	E_ORDER_TYPE er Type Multi-Line III [Sourced] Drop-Box III List-Box III Check-Box III	Field in Use       No         Bytes Used
<u>1</u> . Attributes	<u>2</u> . Validation <u>3</u> . Data Sources	,
Data Type	<ul> <li>③ <u>String</u> [Sourced]</li> <li>○ <u>Numeric</u></li> <li>○ Date</li> </ul>	
Maximum <u>L</u> ength Display Attributes	20      [Sourced]       Uppercase     Fixed Font     Center Text     Right-Justify	iss [Sourced]
<ul> <li><u>M</u>ask</li> <li>Dgfault Value</li> <li>✓ Caption</li> </ul>	Order Type	
		<u></u>

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

<sup>sege</sup> User-Defi	ned Fields					<u>_   ×   ×  </u>
<b>7</b>	Module Accounts Table AR Open [AR_Ope	Receivable Invoice enInvoice ]	U F B	JDFs ïields Used lytes Used	1 39 of 1,000 446 of 20,000	
Field Nam	e YPE	Description Order Type		Type Multiline	Length 20	
				<u> </u>	<u>Cancel</u> Upda	ate 🕜



## **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.

Customizer Panel Selection	on				<u>?</u> ×
Module Sale Task Sale Panel Sale	es Order es Order Entry es Order Entry				
<ul> <li>Create a New Customized Panel</li> </ul>	<u>U</u> ser sid Company AB	d (Sue) BC (ABC Distribu	tion and Service Corp	).] <b>V</b>	✓ All ✓ All
O Modify an Already Customized Panel	User None	Company	Last Edit Date		
				<u>o</u> k <u>c</u>	ancel 🕜

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

	I President and a local sector of the sector	Source: So_SALESORDER.M4L - PHEADER [ &1. Header ]	91
IC	Panel Edit Help	Order Date Order Type Makkér Affleföjsakkir (	
		Customer No.	
	All Users	Cust PD	
-	All Companies		Jŀ
			h.
	Add an Item	Last Urder Date	
		Last Order No.	
00		Ship Date Ship Via Ship Via	
	AU		
	Countlinds	Status Reason Q E-mail	
er		Whee ==Dr Q	
4			
s		Sales Tax	
		Exemption #	
		Split Comm. Split Comm. Split Comm. Split Comm.	
e			1
hi		Print Order 🔄 "printed Job No.	
		Print Pick Sheets rinted IT User ID *IT Order *	
ne		No. of Ship Labels Sage CRM User Sage CRM Opportunity	
		Duick Print Without Displaying Printing Window	
		Add Button [0,0] [1 x 1] SJD ABC 8/29/2014	-
۰E	intry		
E	risting		

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.

	Find Task			
N N	a 🤓 Customizer 🕨	Customize: SO_SALESORDER.M4L - PHEADER [ &1. Header ]		×
	Panel Edit Help	🗖 🔤 Order Date 🔄 🔍 Order Type 🔄 Miskiek /Ruefijkedistrij	Q	
	User/Company		7	
	All Users			
0	All Companies	b or Castro Order Type		
	- Add an Item	eles		
0	irdi 🌅 🔚			
0				
1	sh A 🖸			
n Dr		voir Confirm To	<b>*</b>	
e	Di Group/Undo	voir Status 🔄 Reason 🥰 E-mail		
e	Pr B	DI Whse =cD E State Batch Fax No. Batch Fax [		
.a	be	Billy Comment		
3		uto Exemption # Salesperson		
36		uto Split Comm. Split Comm. ** Sage CF	RM Customer **	
Ge	ene 🛐 🌐 📝			
0	Irdi	Print Order reprinted Job No.		
		Print Pick Sheets reprinted IT User ID	* IT Order *	
		No. of Ship Labels Sage CRM User Sage CRM Opportunity		DD
H		Guick Print Without Displaying Printing Window		
		Add Button (0,0) [1x1]	SJD ABC 8/	29/2014
21	ports			
	Sage 100 ERF	P Customizer		
	The quet	territed envelopes around		
	1) The cust	turnizeu parier was saveu.		
	V			
		······································		

### Exit screen when done.

🕮 * Sales Order Entry (ABC) 8/29/2014	
Order Number 0000176 🖓 📋 🚺 🍕	Copy from Defaults Customer Credit
<u>1</u> . Header <u>2</u> . Address <u>3</u> . Lines	🛓 Totals 🔰 <u>5</u> . Credit Card 🛛 User 🛛 sid
Order Date 8/29/2014 🛅 Order T	ype Standard Order 💌 Master/Repeating No.
Customer No. 01-ABF	🔍 🛃 American Business Futures
Cust PO	Order Type PHONE
	PHONE           Ship To Addr         2           VEB         ures           FAX         Terms Code           01         Net 30 Days
Ship Date 8/29/2014 🛅	Ship Via UPS BLUE Q FOB
	Contirm To John Quinn
	E-mail anderesage.sample.com
Sobedule	Salesperson 0100 Q. Jim Kentlev
Wisconsin	Split Comm. No Split Comm
Print Order	
Print Pick Sheets 🛛 🗹	
Quick Print Without Displaying Printing Window	
Print <u>O</u> rder Print Pic <u>k</u> 🕐 Recalc Price	Accept Cancel Delete 🖨 📀

Repeat the process for the Invoice Data Entry screen.



<sup>8292</sup> * 5/0 Invoice Data Entry (ABC) 8/29/2014								
Invoice No. 0100056 📜 📔 🚺 🖣	Invoice No. 0100056 🗇 🚺 🌒 🖉 🕅 Defaults Customer							
<u>1</u> . Header <u>2</u> . Address <u>3</u> . Lin	es <u>4</u> . Totals <u>5</u> . C	iredit Card						
Invoice Date 8/29/2014	Invoice Type Standard Inv	oice 💌 Sales Order Number	r 0000176 🖓					
Customer No. 01-ABF	American	Business Futures						
Cust PO	Order Type	PHONE						
Order Status     New       Ship Date     8/29/2014       Due Date     9/28/2014       Discount Date     8/29/2014       Warehouse     001       EAST WAREHOUSE       Sales Tax       Schedule     WI       Wisconsin	Apply to Inv #       Ship To Addr       2       Terms Code       01       Ship Via       UPS BLUE       Confirm To       John Quin       E-mail       artie@sag       Fax No.       Comment       Salesperson       O100       Split Comm.	American Business Futures Net 30 Days Control	Print Invoice V					
Quick Print	<u></u>	Accept Cancel						

#### 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.



<sup>sage</sup> Invoice	Printing							
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Main Repor	t							
í -								<b>_</b>
				Invoice			Page:	· •
	ABC Distribution and Servi	ce Corp.			InvoiceNumbe	r: 0100056-IN		
	1525 Technology Drive Irvine, CA 77356				Invoice Dat	e: 8/29/2014		
	(555) 111-1212				OrderNumbe	r: 0000176		
					OrderDat	te 8/20/2014		
					Salesperso CustomerNumbe	1: 0100 1: 01-ABF		
					-	PHONE		
	Sold To: American Business Futures				Ship To: American Business Futures			
	2131 N. 14th Street Suite 100				RacineWarehouse 5411 Kendrick Place			
	Accounting Department Milwaukee, WI 53205-1204	4			Racine, WI 53120			
	Confirm To:							
	Suntemar B.O.	Chin MA	50	P	Torma			-
	custome P.O.	UPSBLUE	P.0	.0.	Net 30 Days			
	Item Code	Unit	Ordered	Shipped	BackOrdered	Price	Amount	_
	1001-HON-H252	EACH	1.00	1.00	0.00	84.000	84	00
	HON 2DRAWER LETTER	R FLE W/O LK	w	/hse: 001				
Current Page	• No.: 1		Total Page No.: 1		7	oom Factor: 100%		
			, and age nor a		F			

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

📪 Customizer 🗙	View <u>H</u> elp	<u>M</u> ain	<u>Reports</u> <u>Period</u> End	<u>S</u> etup <u>U</u> tilities	Custom Reports	<u>E</u> xplore (	Cus <u>t</u> om Process Flov	VS	
Panel Edit Help	i 🔁 🗞 🍪		]						
User/Company	sage Cust	omize: AR_C	USTOMER.M4L - PI	INVOICE [ Invoi	ces Folder ]				×
sid	AS9								
Add an Item									
	ent								
	6								٤
Group/Undo	ihts								
	aste								
- Tools	info								
	insi								
■ # 🔊	ces								
	edg								
	Rei								
		N INVOICES .	Listboy (2, 12) [!	96 v 11 <i>J</i> 1			SID	ABC	8/29/2014
E Perio	od Entu			00 / 11.4]			] 360 ]	ADC	0/20/2014
🕀 🧰 Setu	ip in								
	Jes Doporto								

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

st Box Definit	ion [LB_OPE	N_INVOICES	]				
<u>1</u> . Main	<u>2</u> . F	Format	mat <u>3</u> . Options				
- List Box Forma	ət						
Column Title		Width	Position	I	Hide		
Invoice No.		11.00	Left	•			
Invoice Type		12.00	Left	-			Add
Inv Date		10.00	Left	-			▲ 🔻
Inv Due Date		12.00	Left	•			
Disc Date		10.00	Left	-			<u>R</u> eset
Sold To		12.00	Left	-		•	
Preview				[Width	n and Hei	ght No	t to Scale
Invoice No.	Invoice Type	Inv Date	Inv Due	e Date	Disc D	ate	Sold To
				<u>0</u> K	<u>C</u> ance	el 🗍	<u>D</u> elete

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

<sup>see</sup> Field Selection	
To add a field to the list box, double-click the corresponding data source and field.	
Image: CommissionRate         Image: CommissionRate         Image: TaxableAmt         Image: TaxableAmt <th></th>	
	<b>_</b>
	ancel

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.

🍄 List Box Definition [LB_OPE	N_INVOICES	5]				?	×
<u>1</u> . Main <u>2</u> .	Format	3. Options					
List Box Format							
Column Title	Width	Position		Hide			
Customer PO No.	15.00	Left	•				
Comment	15.00	Left	•			Add	
Terms	7.00	Centered	•			▲ ▼	
Sispren	8.00	Centered	•				
Job No.	8.00	Left	•			<u>R</u> eset	
Order Type	20.00	Left			⊡		
Preview			ľ	Width and Heig	ght N	ot to Scale]	
Invoice No. Invoice Type	Inv Date	Inv Du	ie D	ate – Disc Dy	ate	Sold To	
				~			
			0	K <u>C</u> ance		<u>D</u> elete	

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

🔓 * Custome	r Maint	enance (A	BC) 8/2	9/2014							ſ	<u> </u>
Customer No. Name	01-ABP Americ	an Business I	Futures	^.		•	• ••	C <u>o</u> py	From	Renum <u>b</u> er		•
<u>1</u> . Main	<u>2</u> . A	dditional	<u>3</u> . Stati:	stics	<u>4</u> . Summar	ן ע	<u>5</u> . History		zes	. Fransactions	<u>8</u> .9	5/Us
Disc Date		Amount 84.00 2,416.25 38.20 130.00		Discount 0.00 0.00 0.00 0.00	<u>Ва</u>	alance 84.00 0.00 38.20 130.00	Order Type PHONE		Cu 789 789	stomer PO No.	( <b>▲</b>	<b>1</b>
T	2,416.25 265.86 666.53 2,032.54 864.25			0.00 0. 0.00 0. 0.00 0. 0.00 0. 0.00 0.		0.00 0.00 0.00 0.00 0.00	10 10 10 10 10 10			1		<b>.</b>
Trans Date 8/29/2014	: ∆ <u>Tra</u> Inve	ins Type	Trans	s Amount 84.00	Pay Date		Check No.	Paymen	t Ref	Cr Card	RMA N	
B	alance	= = = =	Durrent		30 Days		60 Days		90 Days	120	Days 0.00	¥4
5,0	515.35	3,0	010.30		0.00		0.00		0.00		0.00	
								Accep	t <u>C</u> a	ncel <u>D</u> el	ete 🛛 🧔	€