

## How to Add a Table to the Customer Type Field

The screenshot shows the Sage Customer Maintenance window for customer '01-ABF' (American Business Futures). The interface includes a navigation bar with tabs for Main, Additional, Statistics, Summary, History, Invoices, Transactions, and S/Os. The main area is divided into several sections:

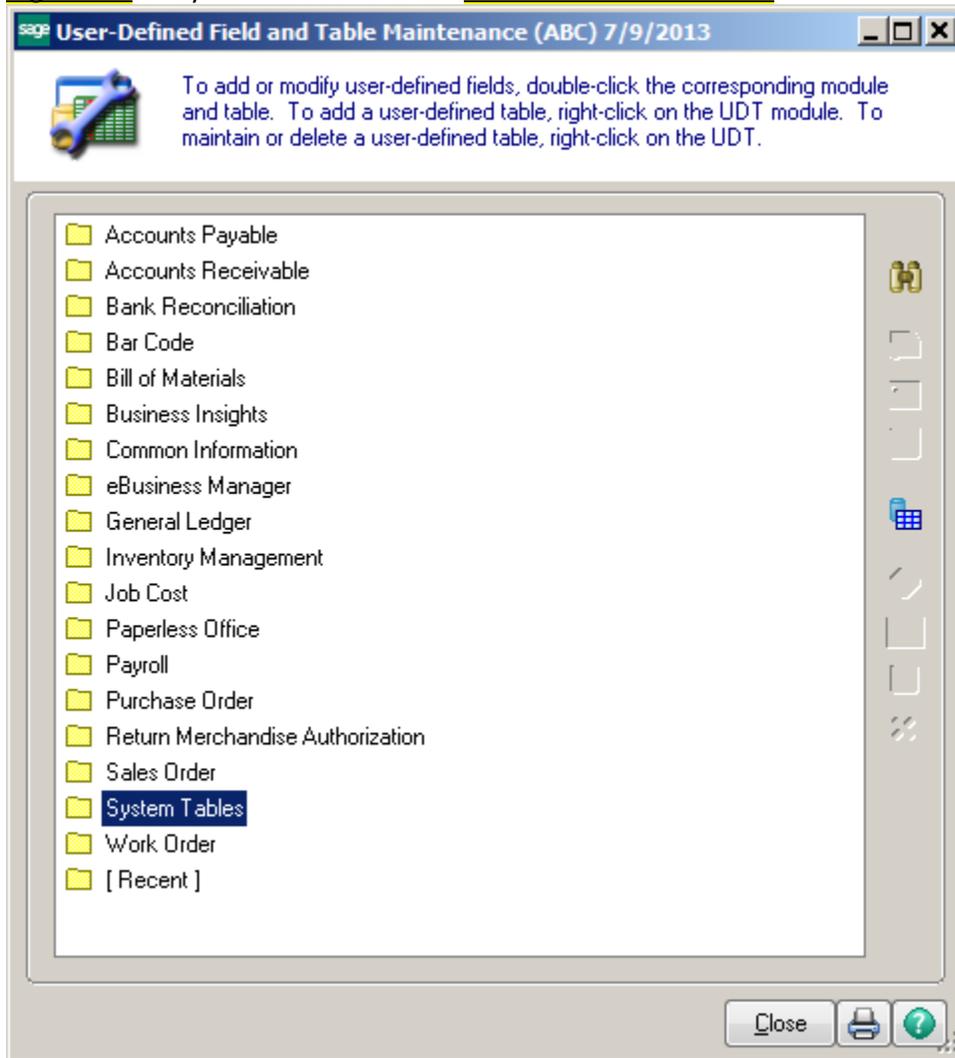
- Comment:** Call Ed for credit approval.
- Open Item Customer:** Checked.
- Internet Enabled:** Checked.
- Customer Status:** Active.
- Data Entry:**
  - Price Level: 1
  - Dflt Pymt Type: NONE
  - Discount Rate: .000 %
  - Fin Charge Rate: 1.500%
  - Item Code: WIDGET (8" x 10" Widgets)
- Printing:**
  - Sort: AMER
  - Customer Type: (empty)
  - Statement Cycle: M
  - Print Dun Message: Checked
  - Batch Fax: (unchecked)
- Primary Credit Card Information:**
  - Card ID: (empty)
  - Payment Type: (empty)
  - Cardholder Name: (empty)
  - Last Four Digits: (empty)
  - Expiration Date: (empty)

Buttons at the bottom include Accept, Cancel, Delete, and a printer icon.

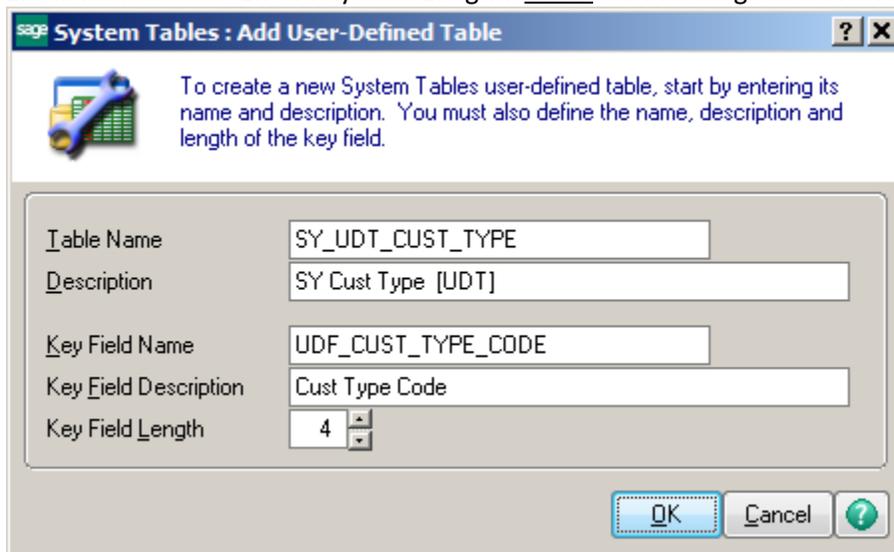
Click on Custom Office – User Defined Field Table and Maintenance

The screenshot shows the Sage 100 ERP interface. The left-hand navigation tree is expanded to show the 'Custom Office' folder, which contains sub-folders for 'Main', 'Customizer Select', 'User-Defined Field', 'User-Defined Scri', and 'Reports'. The 'User-Defined Field and Table Maintenance' option is highlighted in blue. The main window area shows the 'Custom Office - Main' page with options like 'Up one level...', 'Customizer Selection', and 'User-Defined Script Maintenance'. The status bar at the bottom indicates 'ABC Distribution and Service Corp. (ABC)', 'Custom Office', 'SJD', and '7/9/2013'.

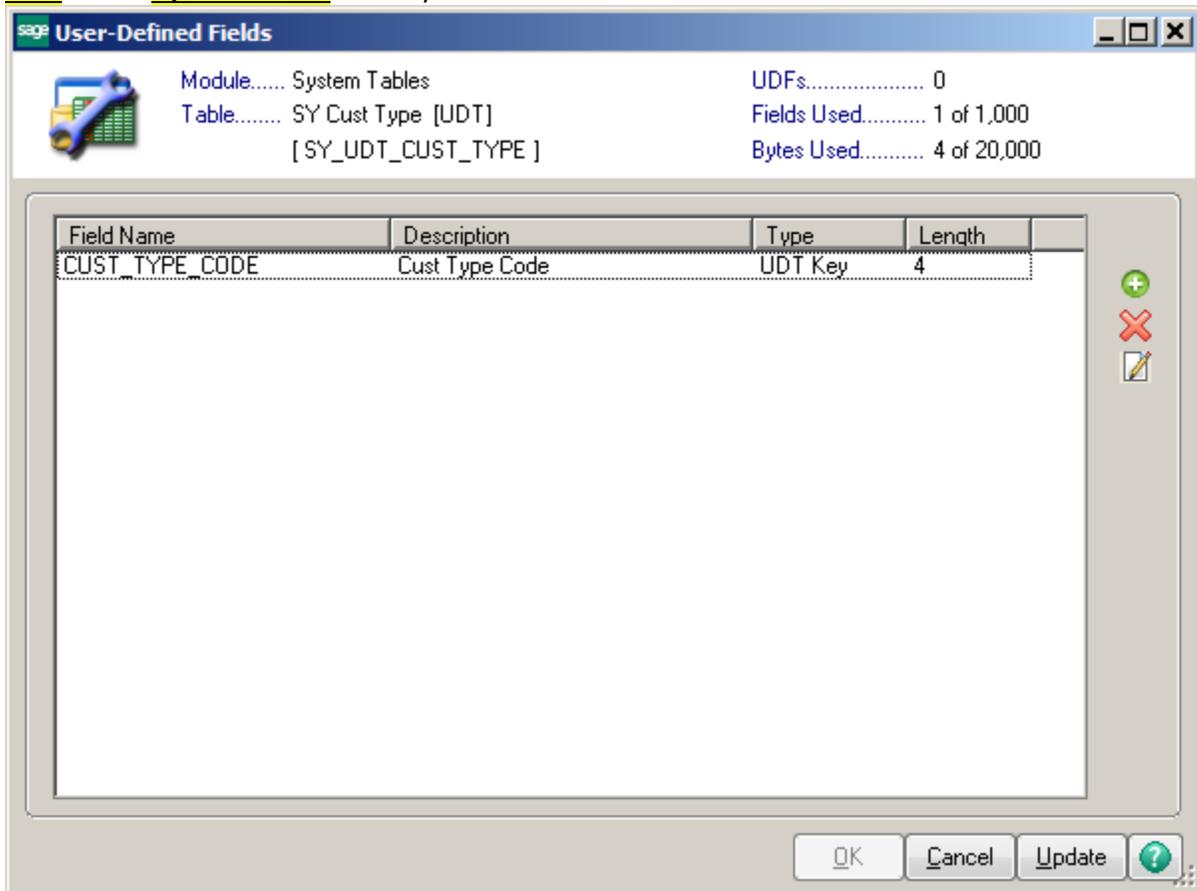
**Right Click** on System Tables. Click on **Add a User-Defined Table**.



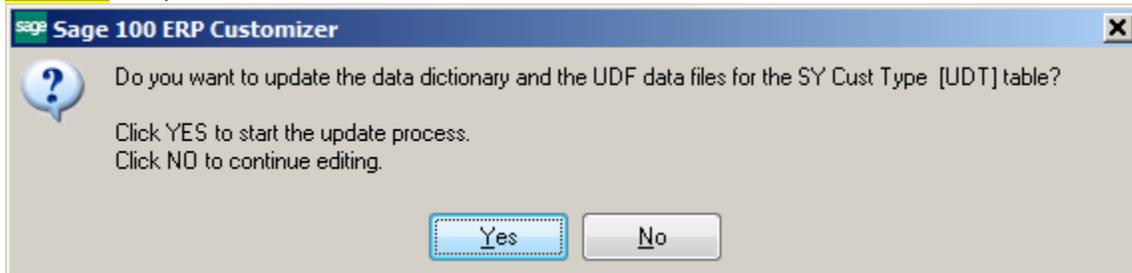
Enter Table Name. Enter Key Field Length. **Note:** Cannot be greater than the existing field length.



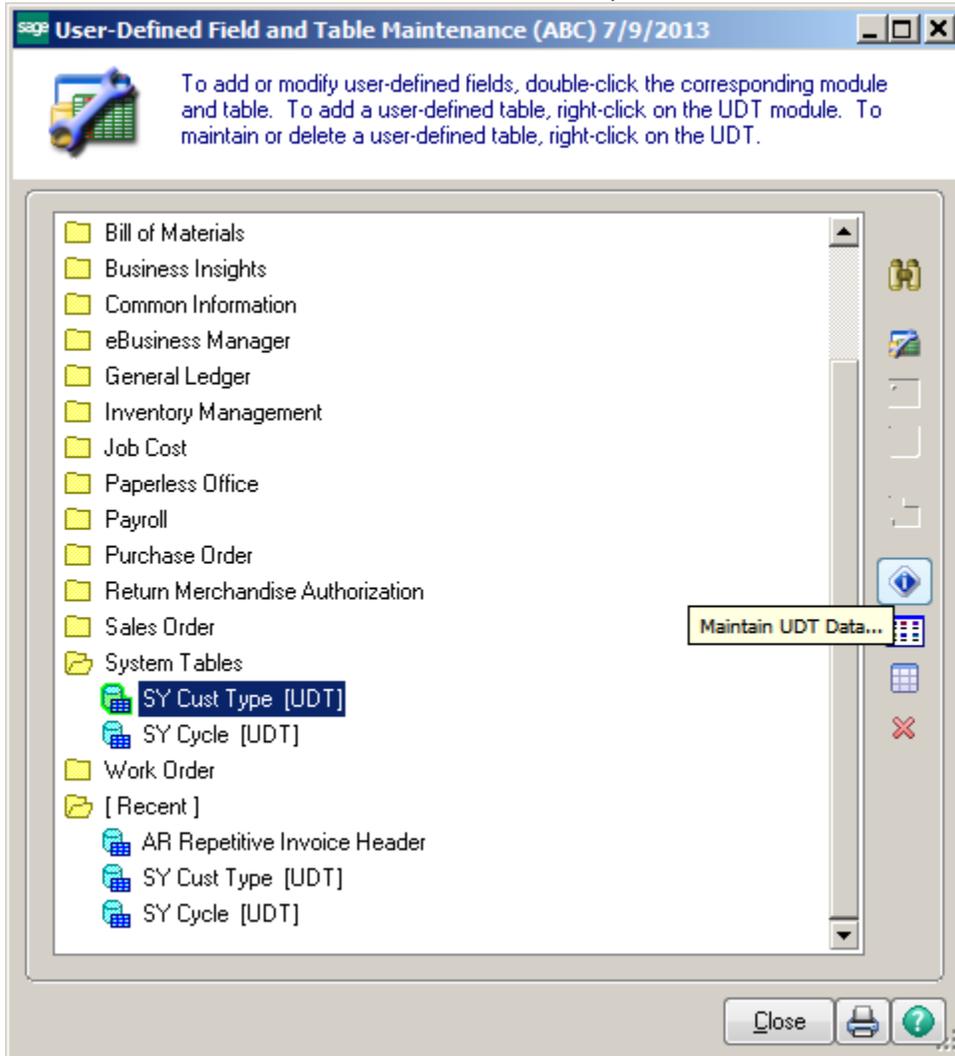
Click on the **Update button** to add your table to the Data Dictionaries.



Click **Yes** to update.



Click the Maintain UDT Data button to add data to your New table.

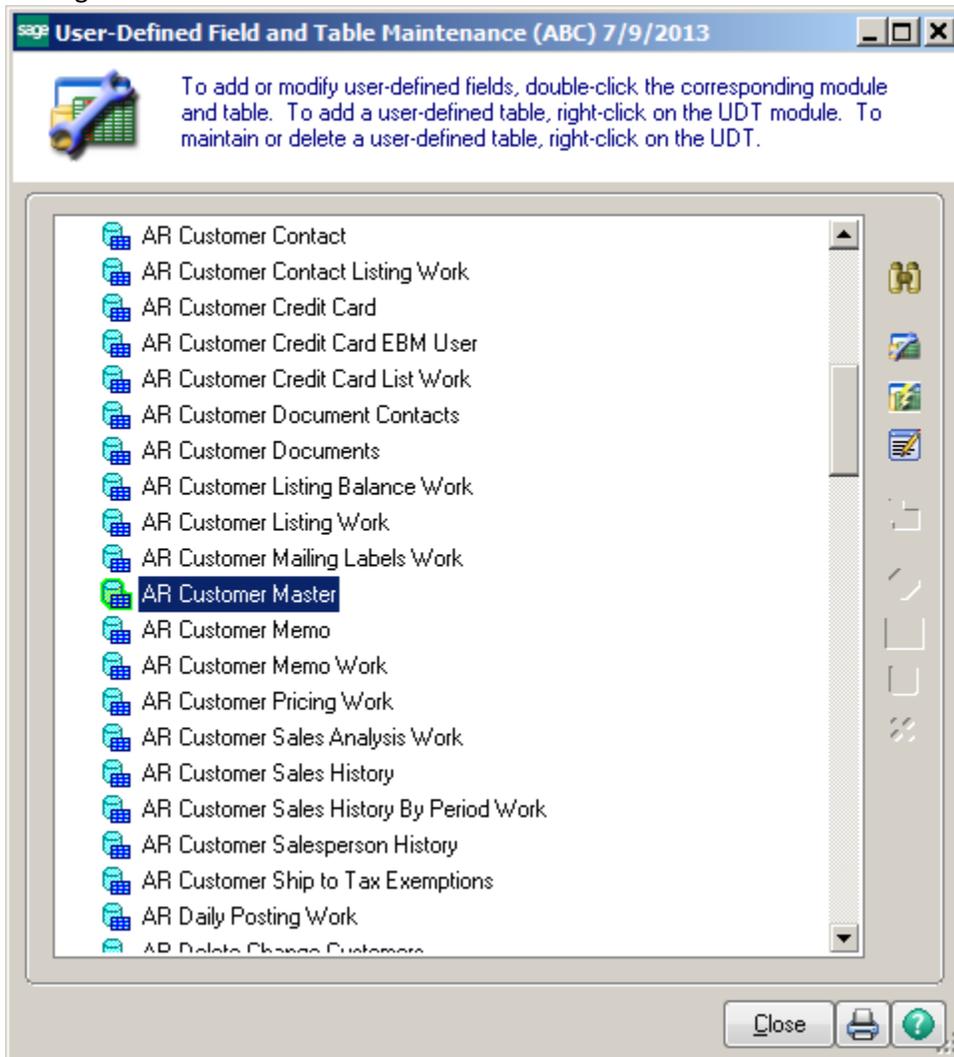


**Enter data into your table.** This will be the fields that you want the users to choose from. **Click Accept.**

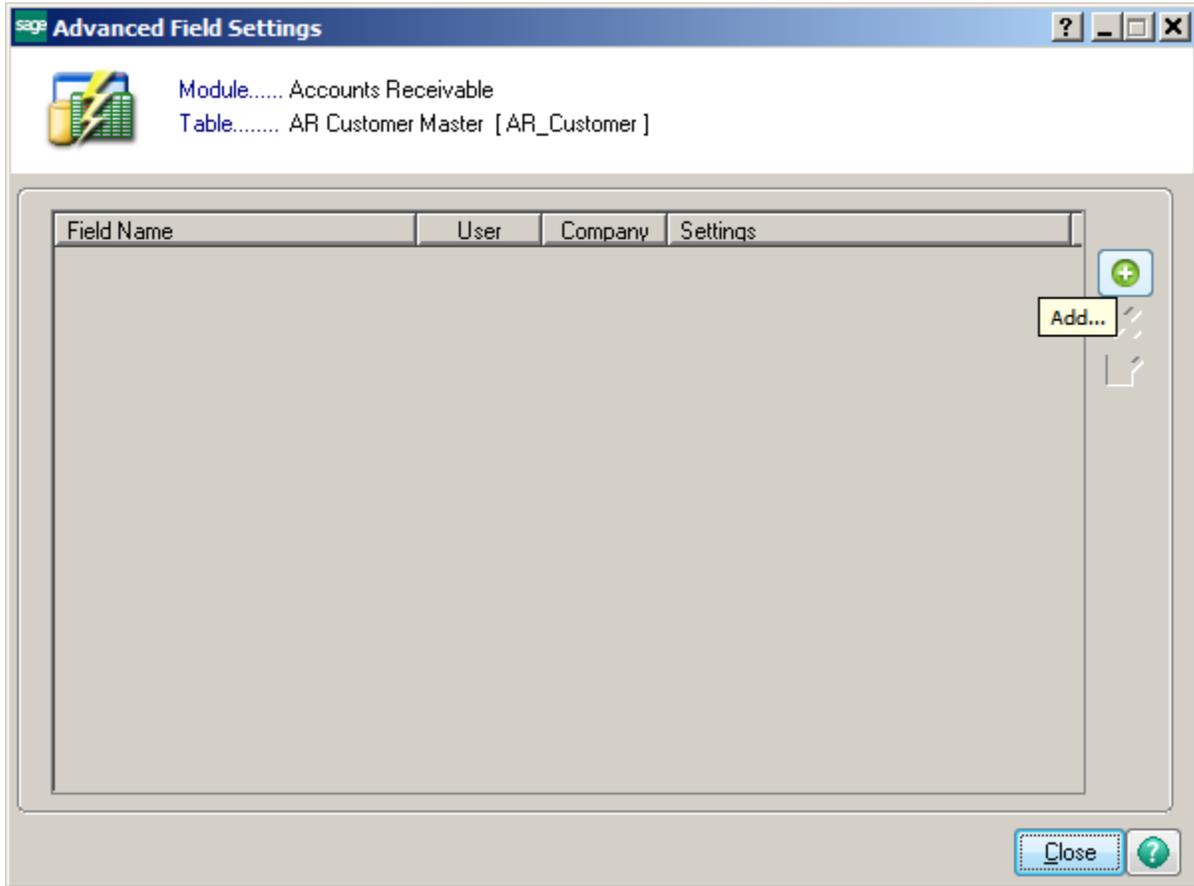
The screenshot shows a window titled "User-Defined Table Maintenance (ABC) 7/9/2013". The window contains a metadata section at the top and a table below. The metadata section shows: Module..... System Tables, Table..... SY\_UDT\_CUST\_TYPE, and Description..... SY Cust Type [UDT]. The table has a header row "Cust Type Code" and four data rows. Row 1 contains "RETL", row 2 contains "WHOL", row 3 contains "DIST", and row 4 is currently selected and highlighted in blue. The window also features a toolbar on the right with icons for adding, deleting, and saving, and a footer with "Accept", "Cancel", and help buttons.

	Cust Type Code
1	RETL
2	WHOL
3	DIST
4	

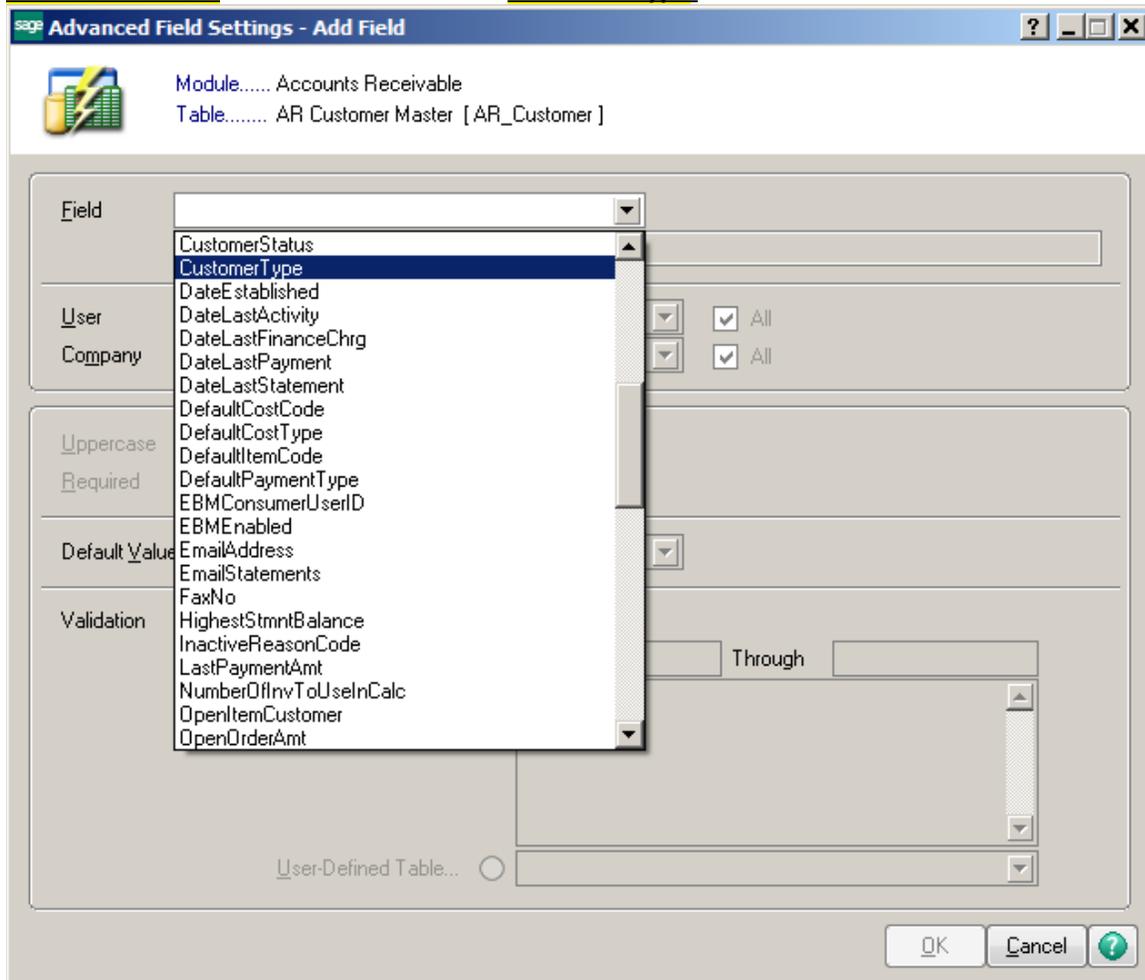
Click on the Accounts Receivable folder. **Right Click** on **AR Customer Master**. Choose Advanced Field Settings.



Click on the Add button.



Click down-arrow at Field and choose the **Customer Type** field.



1. Can be added for Specific Users or Companies
2. Lock means you can't change this field, ex: make it Uppercase
3. Can enter a default value
4. Click on User-Defined Table radio button to choose table to validate with
5. Click OK then Click Close.

**Advanced Field Settings - Add Field**

Module..... Accounts Receivable  
Table..... AR Customer Master [AR\_Customer]

Field: CustomerType  
"Customer Type" - String - Length 4 - Uppercase

User: sjd (Sue)  All  
Company: ABC (ABC Distribution and Service Corp.)  All

Uppercase    
Required

Default Value: DIST

Validation:
 

- None
- Range of Values...  [ ] Through [ ]
- List of Values...  [ ]
- User-Defined Table...  SY\_UDT\_CUST\_TYPE

OK Cancel 

Create a new company and see new data in field.

**sage Customer Maintenance (ABC) 7/9/2013**

Customer No. 01-XYZCO  
Name XYZ Co \*\*\* NEW \*\*\*

Copy From... Renumber... More...

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

Comment  
Open Item Customer  Internet Enabled   
Customer Status Active  
[Inactive Reason](#)

Data Entry  
Price Level  
Dflt Pymt Type CHECK CHECK  
Discount Rate .000 %  
Fin Charge Rate 1.500 %  
[Item Code](#)

Printing  
Sort  
Customer Type DIST  
Statement Cycle M  
Print Dun Message   
Batch Fax

Primary Credit Card Information  
Card ID  
Payment Type  
Cardholder Name  
Last Four Digits  
Expiration Date [Credit Cards...](#)

Accept Cancel Delete