How to Create a User Defined Field

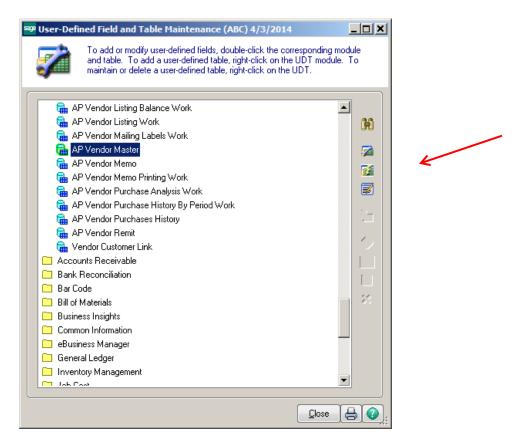
Click on Custom Office\Main. Select User-Defined Field and Table Maintenance.

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	and the second sec		Library Master SJD	4/3/2014

Select the folder for the module that you need to create the user-defined field for.

^{see} User-Defined Field and Table Maintenance (ABC) 4/3/2014	
To add or modify user-defined fields, double-click the corresponding mo 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.	
 Accounts Payable Accounts Receivable Bank Reconciliation Bar Code Bill of Materials Business Insights Common Information eBusiness Manager General Ledger Inventory Management Job Cost Paperless Office Payroll Purchase Order Sales Order System Tables Work Order [Recent] AR Customer Master AD Invesion Union 	
	₽0,

Highlight the table that you need to create the user-defined field in. Click on the Edit Fields button.



Click on the Add button.

saga	User-Defi	ned Fields			
	1	Module Acc Table AP [AF		UDFs 0 Fields Used 55 of 1,000 Bytes Used 810 of 20,000	
	Field Nam	e	Description	Type Length	
				OK Cancel Update	

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Adding a Checkbox field:

Enter the name of the User Defined field that you want to create.

AP_Vendor : Add	Field ? _ O X
Field Name	W9
Source for UDF Data	
Source	<u>Manual Entry</u> <u>Business Object</u>
Bu <u>s</u> iness Object	
Data Source	
Co <u>l</u> umn	Ignore if Null
Column Information	
·	<u>_K</u> _ancel

Hit Enter, the name will change, UDF will be added to the front of the field. Choose Manual Entry as the Source. Click OK.

⁸³⁹⁸ AP_Vendor : Add I	Field	? <u> </u>
<u>F</u> ield Name	UDF_W9	
<u>D</u> escription	W9	
- Source for UDF Data		
Source	 Manual Entry Business Object 	
Bu <u>s</u> iness Object		~
Da <u>t</u> a Source		~
Column		🚽 📃 Ignore if Null
Column Information		<u> </u>
L		OK Cancel

Click Checkbox and change the Caption if you want it to state something different than the Field Name Description. Click OK.

AP Vendor Master : Add Fie	ld	? _ • •	
Eield Name UDF_W3 Description W3 Control Type Multi-Line O prop-Box List-Box I o Check-Box Check-Box		Field in Use	
<u>1</u> . Attributes	2. Validation <u>3</u> . Data Sources		
Data Type String Numeric Daje Maximum Length 1 Display Attributes Uppercase			
Mask Default Value Caption			
		<u>D</u> K <u>C</u> ancel	

Adding a List Box field:

Enter the name of the User Defined field that you want to create. Click OK.

AP_Vendor : Add I	ield ?
<u>F</u> ield Name	UDF_REASON_CODE
<u>D</u> escription	Reason Code
Source for UDF Data	
Source	 Manual Entry Business Object
Bu <u>s</u> iness Object	_
Da <u>t</u> a Source	
Column	Ignore if Null
Column Information	A
	KCancel

Choose the Control Type for the field.

AP Vendor Master: A	dd Field	?
-	REASON_CODE	Field in Use No Bytes Used
Control Type O M O D C Li	ulti-Line III rop-Box III st-Box III heck-Box IIA	Name Space Used
<u>1</u> . Attributes	<u>2</u> . Validation <u>3</u> . Data Sources	
Data Type Maximum <u>L</u> ength	String Numeric Date 15	
Display Attributes	Uppercase Fixed Font Center Text Right-Justify Borderk	ess
☐ <u>M</u> ask ☐ iDefault Value ✔ Caption	Reason Code	
×		
		<u> </u>

Control Type Options:

• Select Drop-Box to allow selection from a list of valid values. A list of values will appear below the entry field using standard Windows drop-box conventions.

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	AIRWAY 🖂 🚺 🌒 🕨 🗒 way Property	Copy From
<u>1</u> . Main <u>2</u>	Additional] <u>3</u> . Statistics <u>4</u> . Summary <u>5</u> . History	<u>6</u> . Invoices <u>7</u> . Transactions <u>8</u> . Checks <u>9</u> . P/Os
Address	7888 Saddlebush Trail	Terms Code 03 Q NET END OF MONTH Reference
ZIP Code City	92669-0001 Orange State CA	Hold Payment
Country Primary Contact	USA & United States of America	Standard Entry Class
Telephone Fax	(714) 555-0980 Ext 5852 (714) 555-0900	Exemption No. on File Tax Schedule NONTAX Nontaxable T
E-mail Address URL Address	Ihenry@sage.sample.com www.bestsoftwareinc.com	Reason Code Paperjess
		No Response

• Select List-Box to display a list of valid values that can be scrolled through and selected. List box controls that are added to a grid are displayed as drop boxes.

Vendor No. 01-	tenance (ABC) 4/4/2014 AIRWAY	Copy From <u>B</u> enumber More •
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Address ZIP Code City Country <u>Primary Contact</u> Telephone Fax	7888 Saddlebush Trail Bank Building Suite 1008 92669-0001 Orange State CA USA United States of America LEO HENRY (714) 555-0900	Terms Code 03 NET END OF MONTH Reference
E-mail Address URL Address	Ihenry@sage.sample.com	Reason Code Incorporated Accept Cancel

• Select Multi-Line for a general purpose text entry field that can consist of one or more lines of text. Use multi-line controls to enter text, numerics and dates.

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Address ZIP Code City Country <u>Primary Contact</u> Telephone	7888 Saddlebush Trail Bank Building Suite 1008 92669-0001 Orange State CA USA LEO HENRY Ico Henry (714) 555-0980 Ext 5852	Terms Code 03 NET END OF MONTH Reference
Fax	(714) 555-0900	Tax Schedule NONTAX Q Nontaxable T
E-mail Address URL Address	Ihenry@sage.sample.com www.bestsoftwareinc.com	Reason Code Paperless
③		Accept Cancel Delete 🖶 📀

Click on the Validation tab. Enter the list of allowed responses in the List box. Click OK.

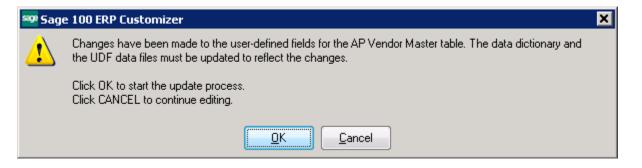
	ster: Add Field				Field in Use No
Field Name	UDF_REASON	LCODE		_	
De <u>s</u> cription	Reason Code			_	Bytes Used 826 of 20,000
Control Type	Multi-Line Drop-Box				Name Space Used 715
	 <u>L</u>ist-Box <u>L</u>ist-Box Chec<u>k</u>-Box 				Bytes Used is the sum of the lengths of all columns in the table. Name Space Used is bytes-used plus the lengths of all column names.
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When done entering all the fields, click OK.

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<u></u>			<u> </u>	pdate 🕜

Click OK at the Prompt to update the data dictionary. The fields are added to ALL companies tables.

Note: User have to be out of all companies when added the fields, otherwise you will receive a message that the files are in use.



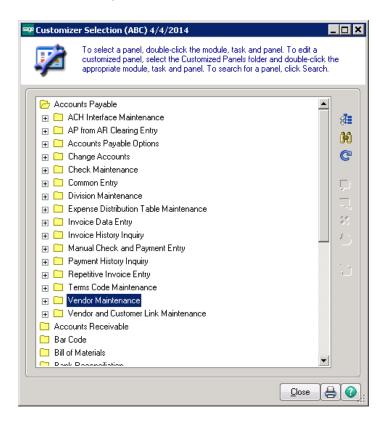
Click on Custom Office\Main. Select Customizer Selection.

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ABC Distribution and Service Corp. (ABC)		Library Mester	SJD 4/3/2014

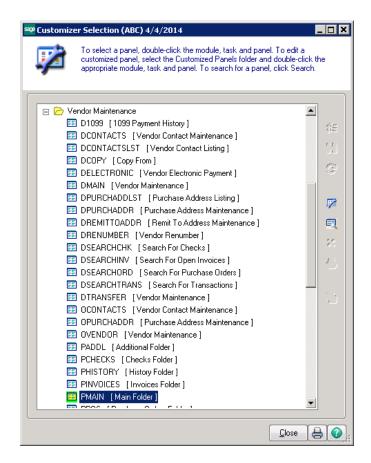
Click on the Module.

^e Customize	r Selection (ABC) 4/4/2014	_ 🗆 >
	To select a panel, double-click the module, task and panel. To edit a customized panel, select the Customized Panels folder and double-click appropriate module, task and panel. To search for a panel, click Search	
Accou	nts Payable	 -
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Custo	miand Danala 1	
		- 1 -
	Close	80

Click the Menu you want to add the field to.



Choose the Panel.



On the Customizer Panel Selection screen choose the user or ALL users, choose the company or ALL companies to add the field.

🔓 Customizer Panel Select	ion:			? ×
Module Ad Task Ve Panel PN	endor Mainten	ance		
 Create a New Customized Panel 	<u>U</u> ser <u>C</u> ompany	sjd (Sue) ABC (ABC Dist	ibution and Service Corp.)	
 Modify an Already Customized Panel 	User sid sid	Company ABC EEC	Last Edit Date 2014/Apr/04 Fri 11:31am 2014/Jan/17 Fri 10:04am	
			<u>_</u> K	<u>C</u> ancel

The Panel will display. Click the Add Field icon from the Customizer toolbar.

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Panel Edit Help	[•] ا	🔆 🍪 🕼 👔 📗 🔚 Vendor Maintenance	
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All Users	459		
All Companies		Address 🦳 Terms Code 🔍	
Add an Item		Reference	
	anu	Credit Card Vendor	
A	aily	ZIP Code Hold Payment	
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Draw your box on the screen where you would like your field to be, then select the field from the Field Section box.

Customizer nel Edit Help	약에 있는 전에서 전에 가족하는 것이다. 이번 Naintenan 🤓 Field Selection		
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Tax Schedule

(Tax Class)

W9

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E-mail Address

URL Address

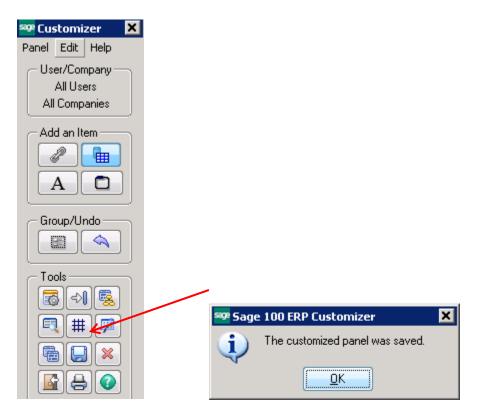
Add UDF (52,18) [6x1.5]

Paperless...

Add Additional field or fields.

See Customize: AP_\	VENDOR.M4L - PMAIN [Main Folder]	X
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		Reference
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City	State	Electronic Payment
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Fax		Tax Schedule
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URL Address		W9 Reason Code
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Add UDF (71,18) [15 x 1.5]	

Click the Save button on the Customizer toolbar when you are done.



Vendor No. 01-	tenance (ABC) 4/4/2014 AIRWAY	Copy From
<u>1</u> . Main <u>2</u> . ,	Additional <u>3</u> . Statistics <u>4</u> . Summary <u>5</u> . History	<u>6</u> . Invoices <u>Z</u> .Transactions <u>8</u> .Checks <u>9</u> . P/Os
Address	7888 Saddlebush Trail Ø Bank Building Suite 1008	Terms Code 03 Q NET END OF MONTH Reference
ZIP Code City Country <u>Primary Contact</u> Telephone	92669-0001 Orange State USA United States of America LEO HENRY Leo Henry (714) 555-0980 Ext 5852	Hold Payment
Fax E-mail Address URL Address	(714) 555-0900	Tax Schedule NONTAX Nontaxable T V W9 Reason Code Exempt Paperjess
		Accept Cancel Delete 🖨 🕢

The screen is now modified and shows the new fields.

BONUS ROUND – How to Add a New Screen Tab

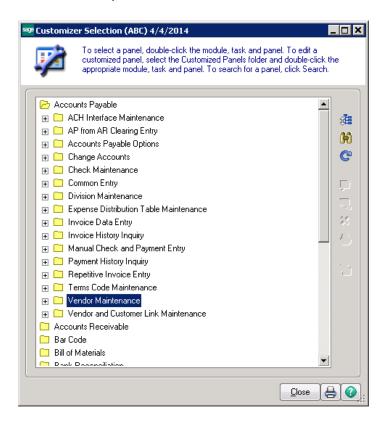
Click on Custom Office\Main. Select Customizer Selection.

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ABC Distribution and Service Corp. (ABC)		Library Master	SJD	4/3/2014

Click on the Module.

Customize	r Selection (ABC) 4/4/2014	
4	To select a panel, double-click the module, task and panel. To edit a customized panel, select the Customized Panels folder and double-click appropriate module, task and panel. To search for a panel, click Searc	
	nts Payable	
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		- 1 -
	Close	

Click the Menu you want to add the field to.



Choose the DMAIN Panel.

1	r Selection (ABC) 4/4/2014 To select a panel, double-click the module, task and par customized panel, select the Customized Panels folder a appropriate module, task and panel. To search for a pan	nd double-cl	ck the
	ndor Maintenance		
	D1099 [1099 Payment History]		_
	DCONTACTS [Vendor Contact Maintenance]		伸
	DCONTACTSLST [Vendor Contact Listing]		1.1
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	DELECTRONIC [Vendor Electronic Payment]		3
	DMAIN [Vendor Maintenance]		
	DPURCHADDLST [Purchase Address Listing]		_
	DPURCHADDR [Purchase Address Maintenance]		1
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55	DRENUMBER [Vendor Renumber]		
	DSEARCHCHK [Search For Checks]		1.22
	DSEARCHINV [Search For Open Invoices]		1
FF	DSEARCHORD [Search For Purchase Orders]		
55	DSEARCHTRANS [Search For Transactions]		
55	DTRANSFER [Vendor Maintenance]		1.5
	OCONTACTS [Vendor Contact Maintenance]		
	OPURCHADDR [Purchase Address Maintenance]		
FF	OVENDOR [Vendor Maintenance]		
55	PADDL [Additional Folder]		
55	PCHECKS [Checks Folder]		
	PHISTORY [History Folder]		
	PINVOICES [Invoices Folder]		
	PMAIN [Main Folder]		•

On the Customizer Panel Selection screen choose the user or ALL users, choose the company or ALL companies to add the field.

🔓 Customizer Panel Selectio	on			? ×
Module Acc Task Ven Panel PMA	dor Maintena	ance		
 Create a New Customized Panel 	<u>U</u> ser <u>C</u> ompany	sid (Sue) ABC (ABC Distri	bution and Service Corp.)	
Modify an Already Customized Panel	User sid sid	Company ABC EEC	Last Edit Date 2014/Apr/04 Fri 11:31am 2014/Jan/17 Fri 10:04am	
			<u></u> K	Cancel

Right click in body of panel.

🔓 Customizer 🛛 🗙	View Help Main Reports Utilities UDT Maintenance	
Panel Edit Help	😼 🚫 🍪 🕜 📲 📙 🔜 Vendor Maintenance	
User/Company	🔓 Customize: AP_VENDOR.M4L - DMAIN [Vendor Maintenance]	×
All Users All Companies	Name	Copy From
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	anu i i i i i pily	ces <u>Z</u> .Transactions <u>8</u> .Checks <u>9</u> . P/Os .
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Click on the Add button.

Folder Tab	C	olor Panel Name	
k1. Main k2. Additional k3. Statistics k4. Summary k5. History k6. Invoices k7. Transactions k8. Checks k9. P/Os		PMAIN PADDL PSTATS PSUMMARY PHISTORY PINVOICES PTRANS PCHECKS PPOS	Go to Panel Custom Tabs Add Delete
Tab Caption Tab Color	<mark>&1. Main</mark> [Default]	Hot l	Кеу
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Ta <u>b</u> Width			
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Change Tab Caption name to the name of the new tab.

older Definition				3
abs				
Folder Tab	Co	blor	Panel Name]
 &1. Main &2. Additional &3. Statistics &4. Summary &5. History &6. Invoices &7. Transactions &8. Checks &9. P/Os &A. Custom Panel 1 			PMAIN PADDL PSTATS PSUMMARY PHISTORY PHISTORY PINVOICES PTRANS PCHECKS PPOS PNL_CMNEW_1	Go to Panel Custom Tabs – Add Del Add Cu
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Click OK.

Conner Ash P.C. © 2014

older Definition			?
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&2. Additional &3. Statistics		PADDL PSTATS	<u>G</u> o to Panel
&4. Summary		PSUMMARY	- Custom Tabs
&5. History &6. Invoices		PHISTORY PINVOICES	Add
&7. Transactions		PTRANS	Delete
&8.Checks &9. P/Os		PCHECKS PPOS	
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						Accept	<u>C</u> ancel	<u>0</u> K	1212	
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Click the Save button on the Customizer toolbar.

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Add an Item	
Group/Undo	
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	The customized panel was saved.

The new tab will now be available on the panel.

🤓 * Vendor Main	tenance (ABC) 4/4/2014	
Vendor No.		Copy From
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<u>Primary Contact</u> Telephone Fax	Ext	Exemption No. on File
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		Accept Cancel Delete 🚑 📀