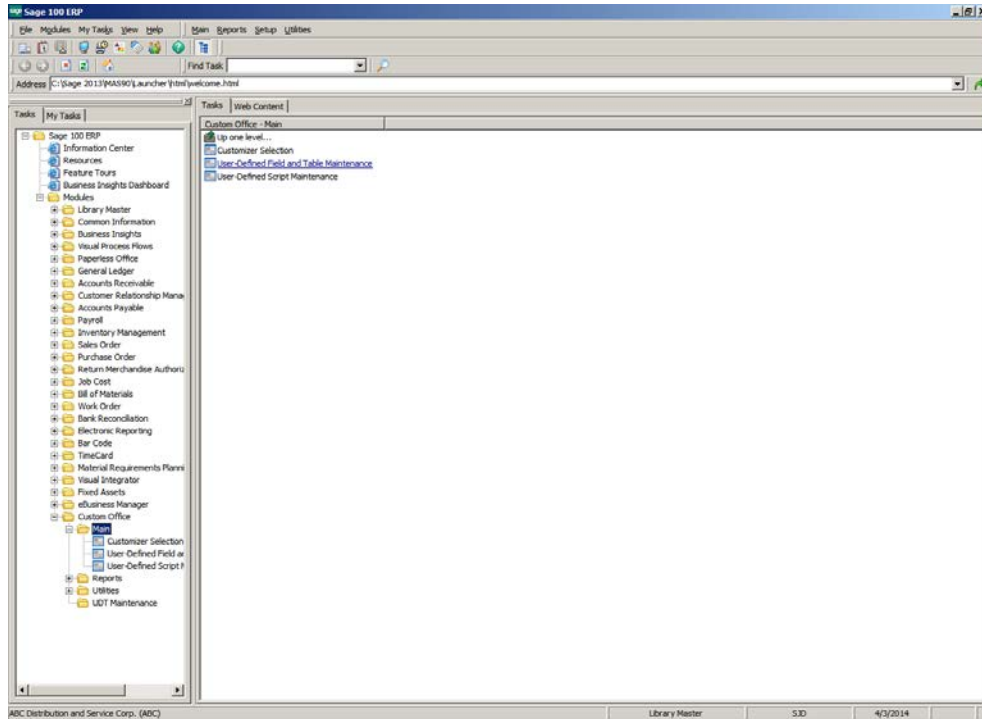
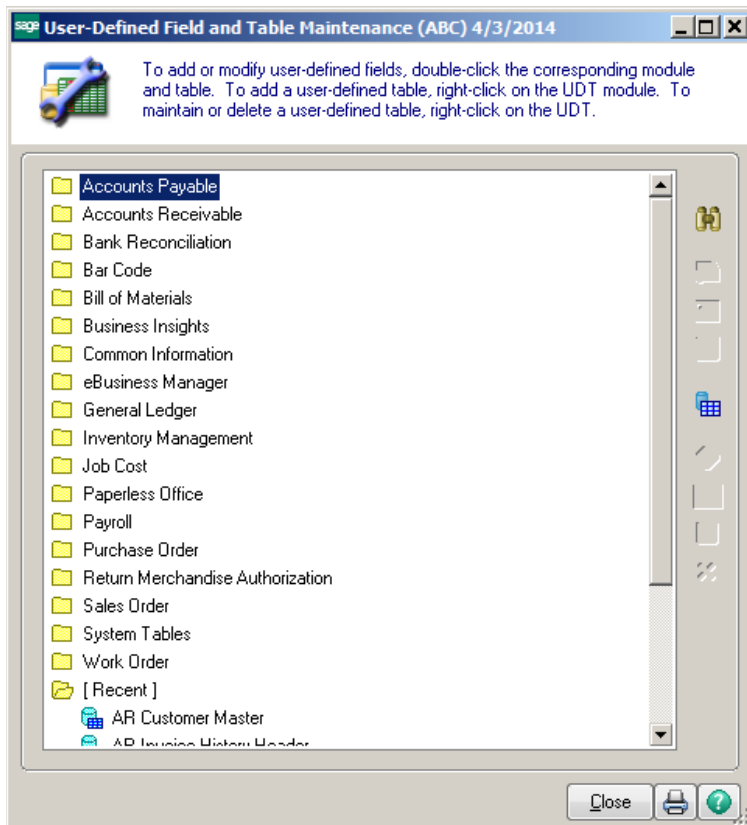


How to Create a User Defined Field

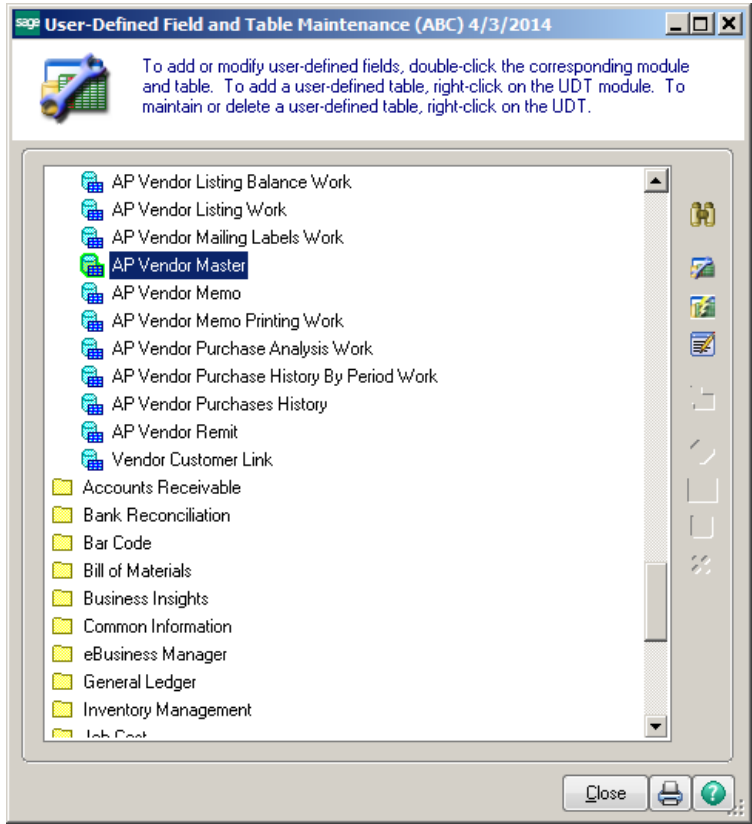
Click on Custom Office\Main. Select User-Defined Field and Table Maintenance.



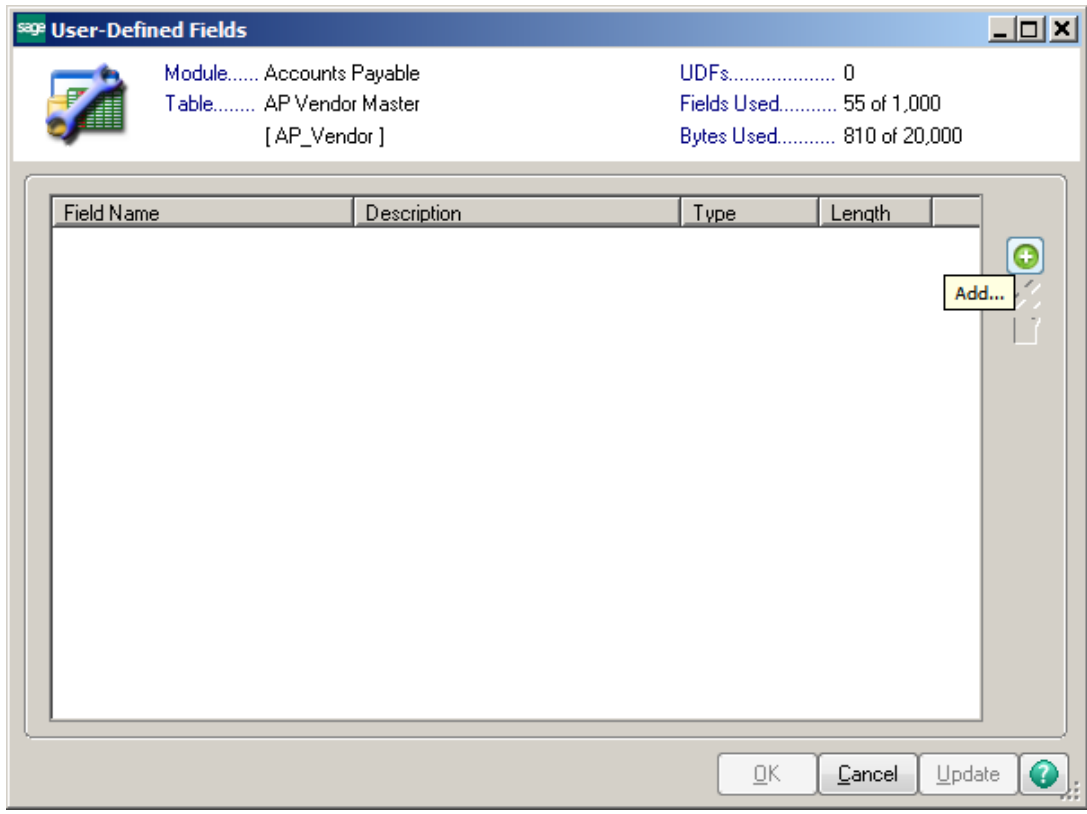
Select the folder for the module that you need to create the user-defined field for.



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



Click on the Add button.



Adding a Checkbox field:

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

The screenshot shows a dialog box titled "sage AP_Vendor : Add Field". It has a "Field Name" text box containing "w9" and an empty "Description" text box. Below this is a section titled "Source for UDF Data" containing a "Source" section with two radio buttons: "Manual Entry" (selected) and "Business Object". There are three dropdown menus for "Business Object", "Data Source", and "Column", all of which are empty. To the right of these dropdowns is an unchecked checkbox labeled "Ignore if Null". Below these is a "Column Information" area with a vertical scrollbar. At the bottom right are three buttons: "OK", "Cancel", and a help icon.

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

This screenshot shows the same dialog box after the first step. The "Field Name" text box now contains "UDF_w9" and the "Description" text box contains "w9". The "Source" section still has "Manual Entry" selected. The "Business Object", "Data Source", and "Column" dropdowns are still empty. The "Ignore if Null" checkbox is still unchecked. The "Column Information" area is still empty. The "OK", "Cancel", and help buttons are still present at the bottom right.

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

Field Name: UDF_W9
Description: W9
Control Type: Multi-Line Drop-Box List-Box Check-Box
Field in Use: No
Bytes Used: 811 of 20,000
Name Space Used: 691
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 Numeric Date
Maximum Length: 1
Display Attributes: Uppercase Fixed Font Center Text Right-Justify Borderless
 Mask
 Default Value
 Caption: W9
OK Cancel ?

Adding a List Box field:

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

Field Name: UDF_REASON_CODE
Description: Reason Code
Source for UDF Data
Source: Manual Entry Business Object
Business Object:
Data Source:
Column:
Ignore if Null:
Column Information:
OK Cancel ?

Choose the Control Type for the field.

Field Name: UDF_REASON_CODE
 Description: Reason Code
 Control Type: Multi-Line Drop-Box List-Box Check-Box
 Data Type: String Numeric Date
 Maximum Length: 15
 Display Attributes: Uppercase Fixed Font Center Text Right-Justify Borderless
 Mask:
 Default Value:
 Caption: Reason Code
 Field in Use: No
 Bytes Used: 826 of 20,000
 Name Space Used: 715
 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.

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.

Vendor No. 01-AIRWAY
 Name Airway Property
 Address 7888 Saddlebush Trail
 Bank Building
 Suite 1008
 ZIP Code 92669-0001
 City Orange State CA
 Country USA United States of America
 Primary Contact LEO HENRY Leo Henry
 Telephone (714) 555-0980 Ext 5852
 Fax (714) 555-0900
 E-mail Address lhenry@sage.sample.com
 URL Address www.bestsoftwareinc.com
 Terms Code 03 NET END OF MONTH
 Reference
 Credit Card Vendor
 Hold Payment
 Electronic Payment
 Standard Entry Class
 Exemption No. on File
 Tax Schedule NONTAX Nontaxable T
 Reason Code: Incorporated, No Response, Exempt

- 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.

The screenshot shows the Sage Vendor Maintenance (ABC) 4/4/2014 window. The Vendor No. is 01-AIRWAY and the Name is Airway Property. The window contains several tabs: 1. Main, 2. Additional, 3. Statistics, 4. Summary, 5. History, 6. Invoices, 7. Transactions, 8. Checks, and 9. P/O's. The main form is divided into several sections:

- Address:** 7888 Saddlebush Trail, Bank Building, Suite 1008, ZIP Code 92669-0001, City Orange, State CA, Country USA, United States of America.
- Primary Contact:** LEO HENRY, Leo Henry, Telephone (714) 555-0980, Ext 5852, Fax (714) 555-0900.
- E-mail Address:** lhenry@sage.sample.com, **URL Address:** www.bestsoftwareinc.com.
- Terms Code:** 03 (NET END OF MONTH) - This is a list box control.
- Reference:** [Empty text field]
- Credit Card Vendor:**
- Hold Payment:**
- Electronic Payment:**
- Standard Entry Class:** [Empty text field]
- Exemption No. on File:**
- Tax Schedule:** NONTAX (Nontaxable T) - This is a list box control.
- Reason Code:** Incorporated - This is a list box control.

Buttons at the bottom include Accept, Cancel, Delete, and Paperless...

- 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.

This screenshot is identical to the one above, but the Reason Code field is now empty, demonstrating the multi-line text entry field.

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

Field Name: UDF_REASON_CODE
Description: Reason Code
Control Type: Drop-Box
Field in Use: No
Bytes Used: 826 of 20,000
Name Space Used: 715

Validation Tab:
None
Range...
List...: Incorporated, No Response, Exempt
User-Defined Table...
Required Field:

Buttons: OK, Cancel, ?

When done entering all the fields, click OK.

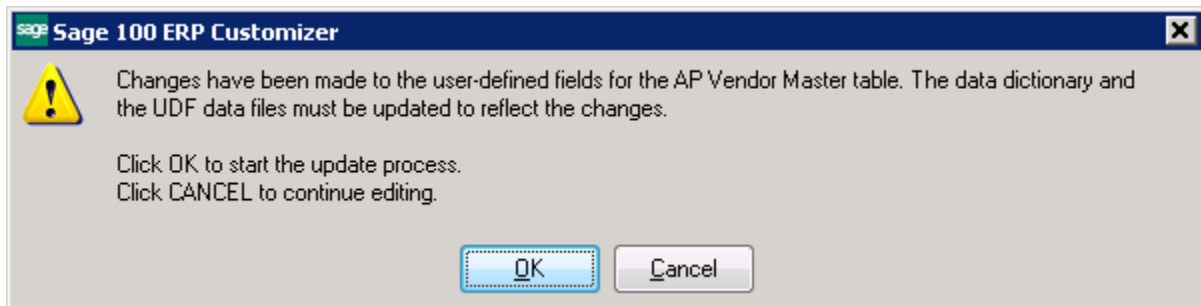
Module: Accounts Payable
Table: AP Vendor Master [AP_Vendor]
UDFs: 2
Fields Used: 57 of 1,000
Bytes Used: 826 of 20,000

Field Name	Description	Type	Length
REASON_CODE	Reason Code	Drop Box	15
W9	W9	Check Box	1

Buttons: OK, Cancel, Update, ?

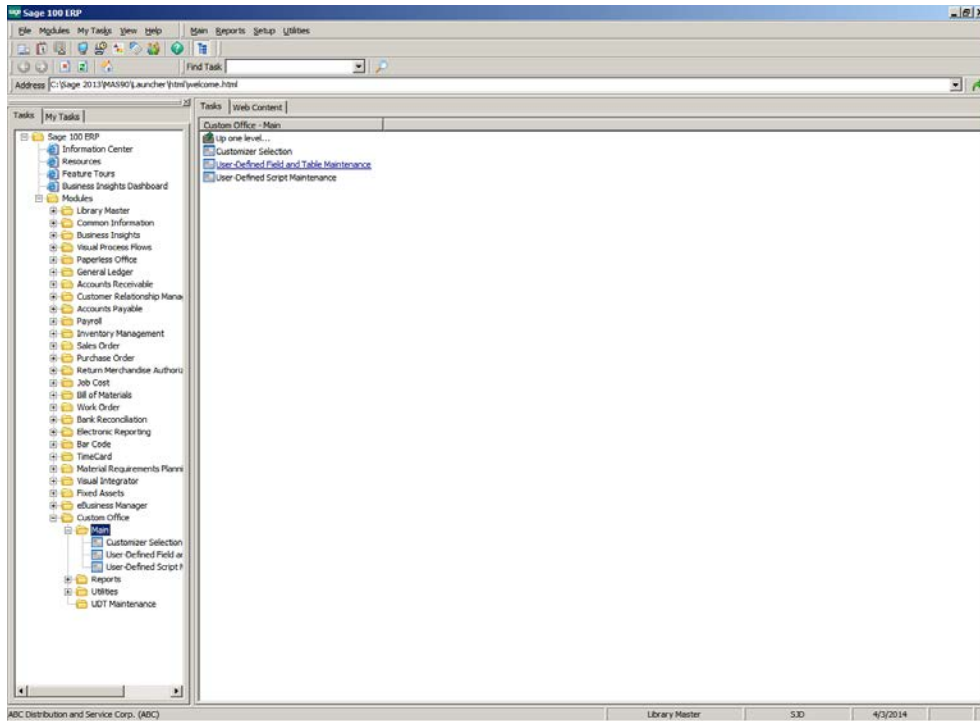
Click OK at the Prompt to update the data dictionary. The fields are added to ALL companies tables.

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.

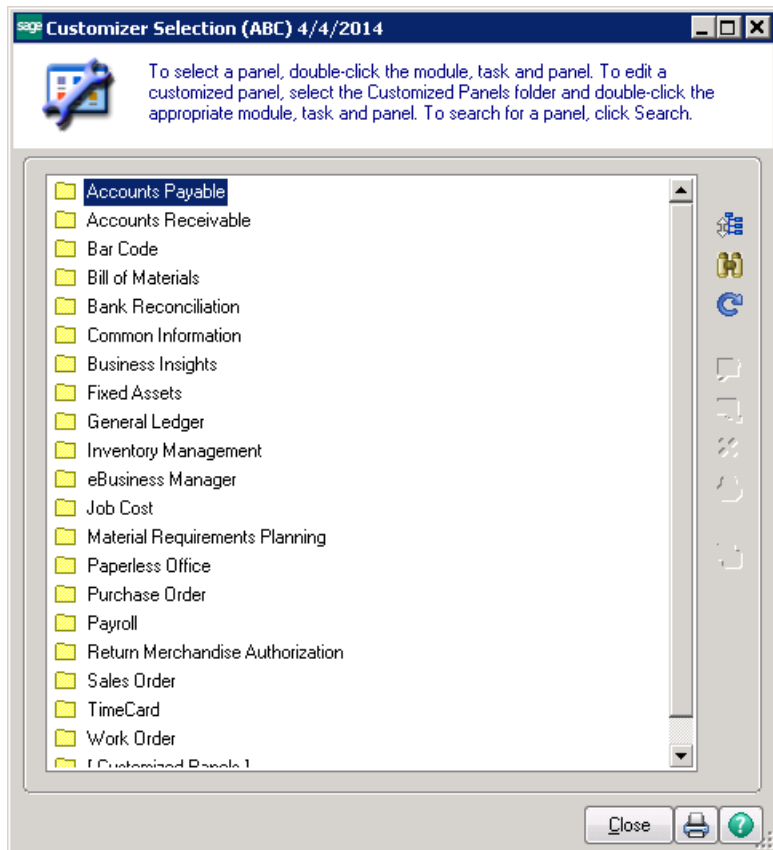


How to Add a UDF to the Screen

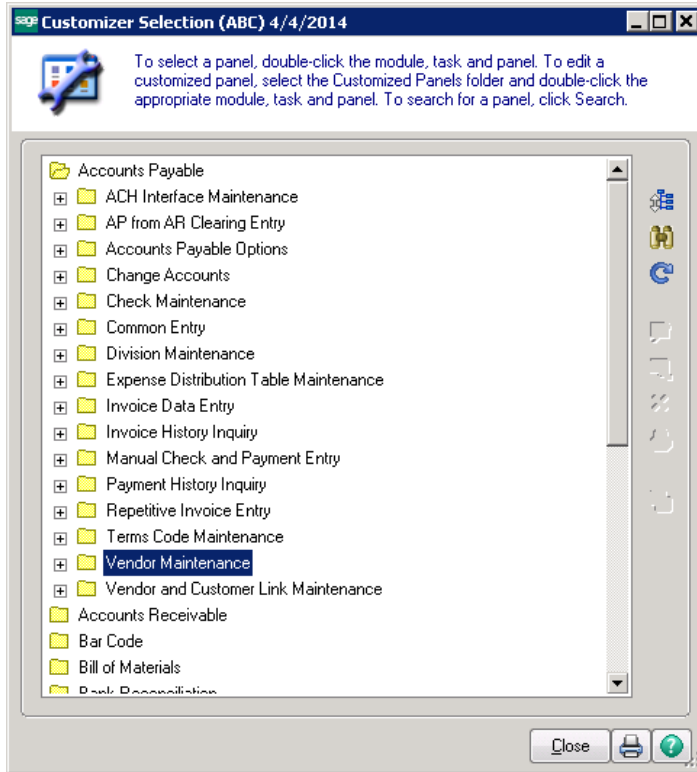
Click on Custom Office\Main. Select Customizer Selection.



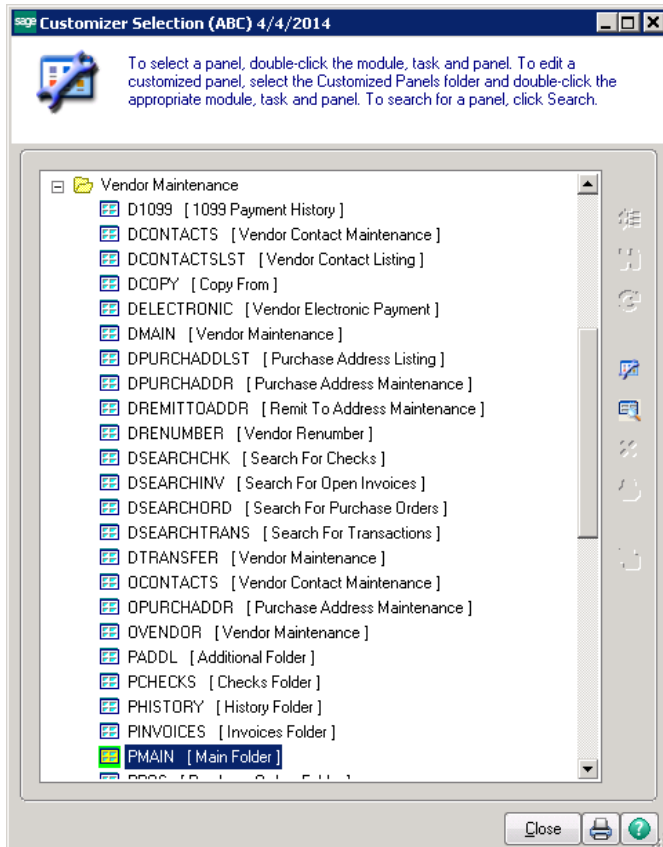
Click on the Module.



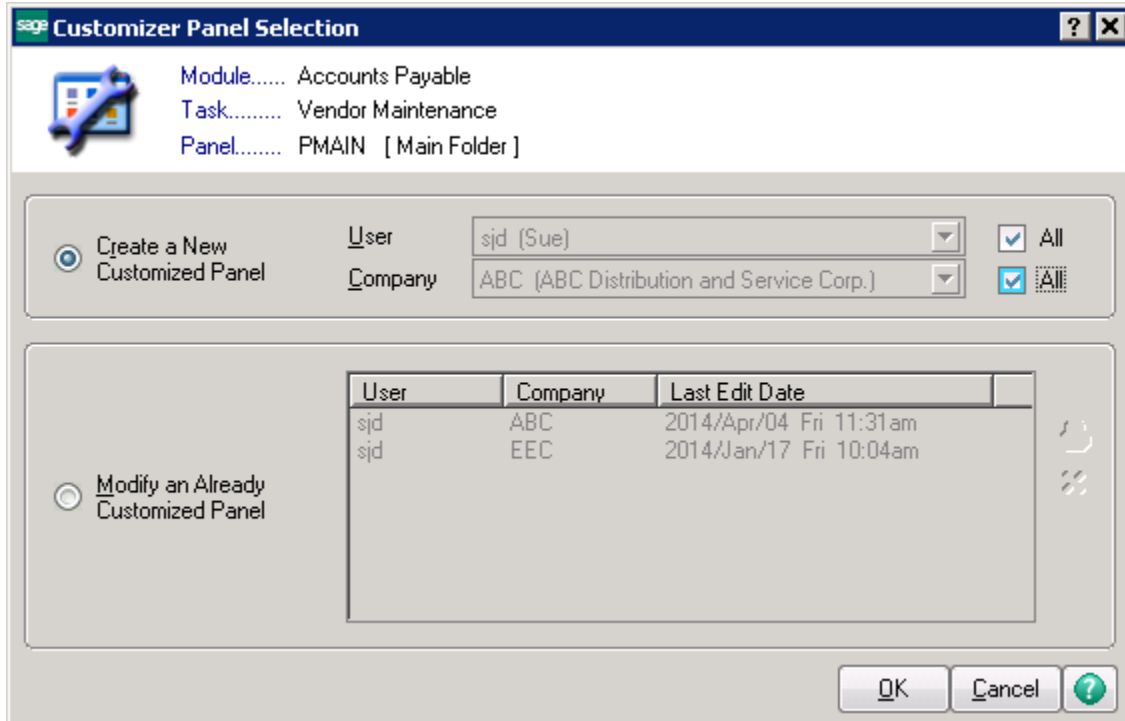
Click the Menu you want to add the field to.



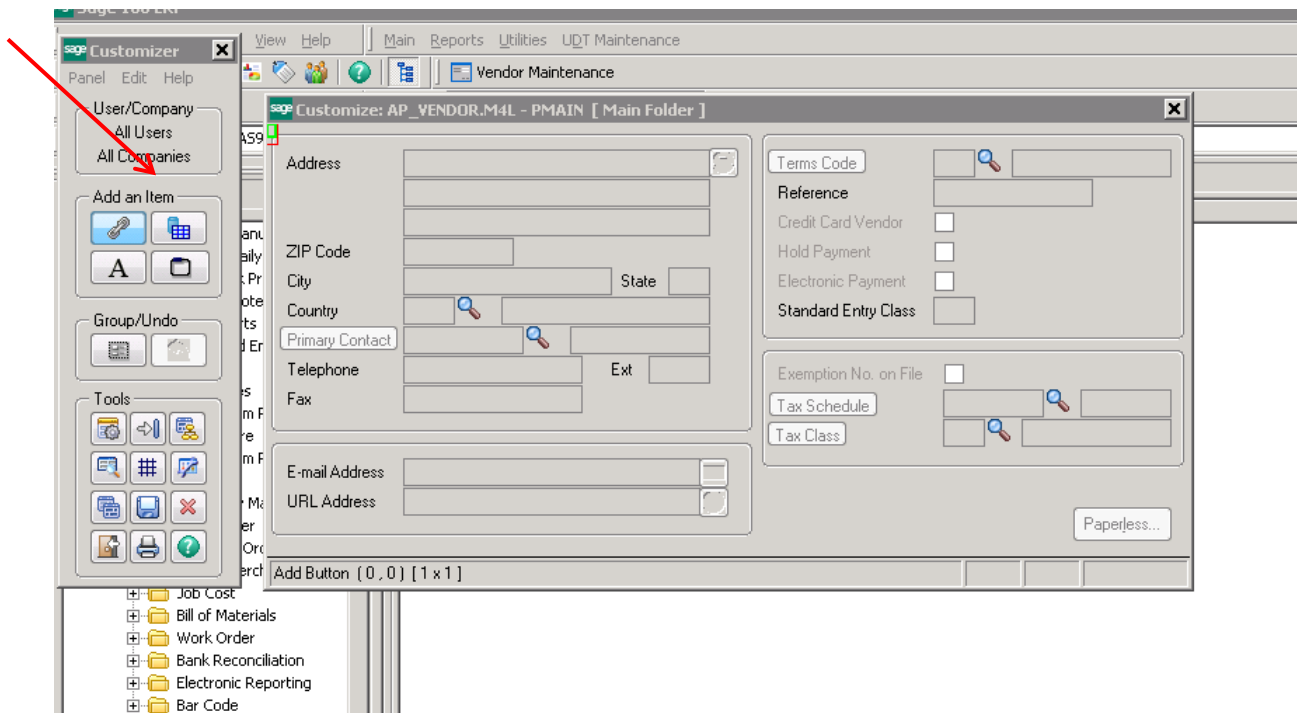
Choose the Panel.



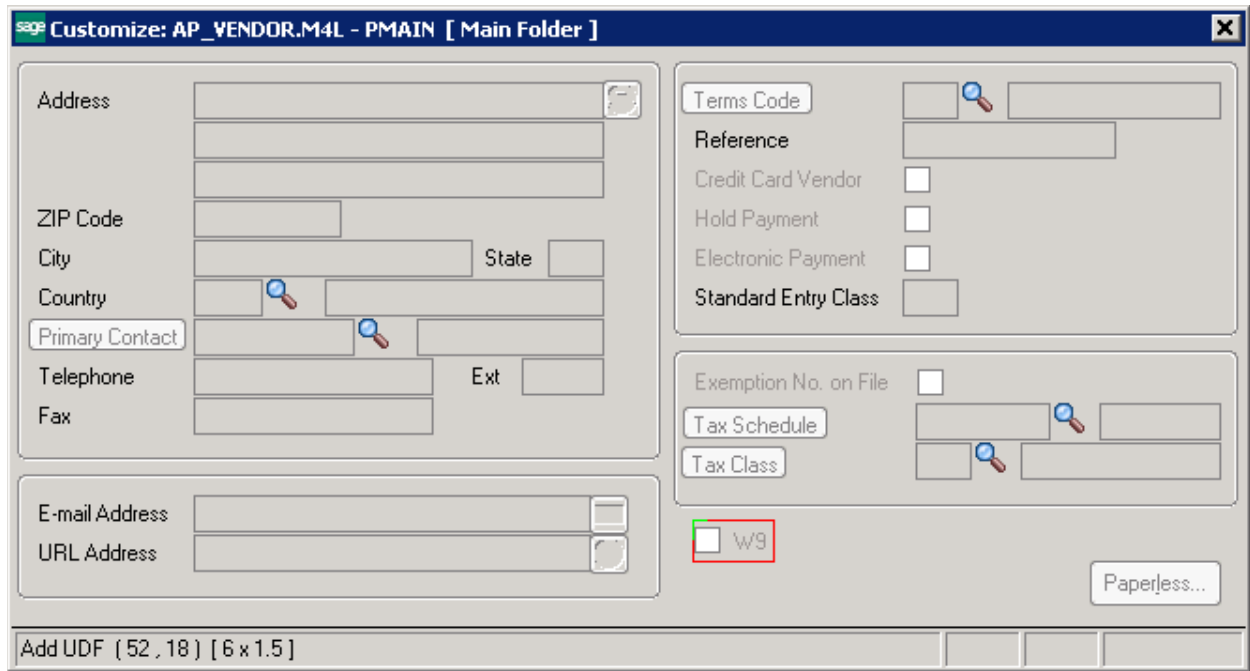
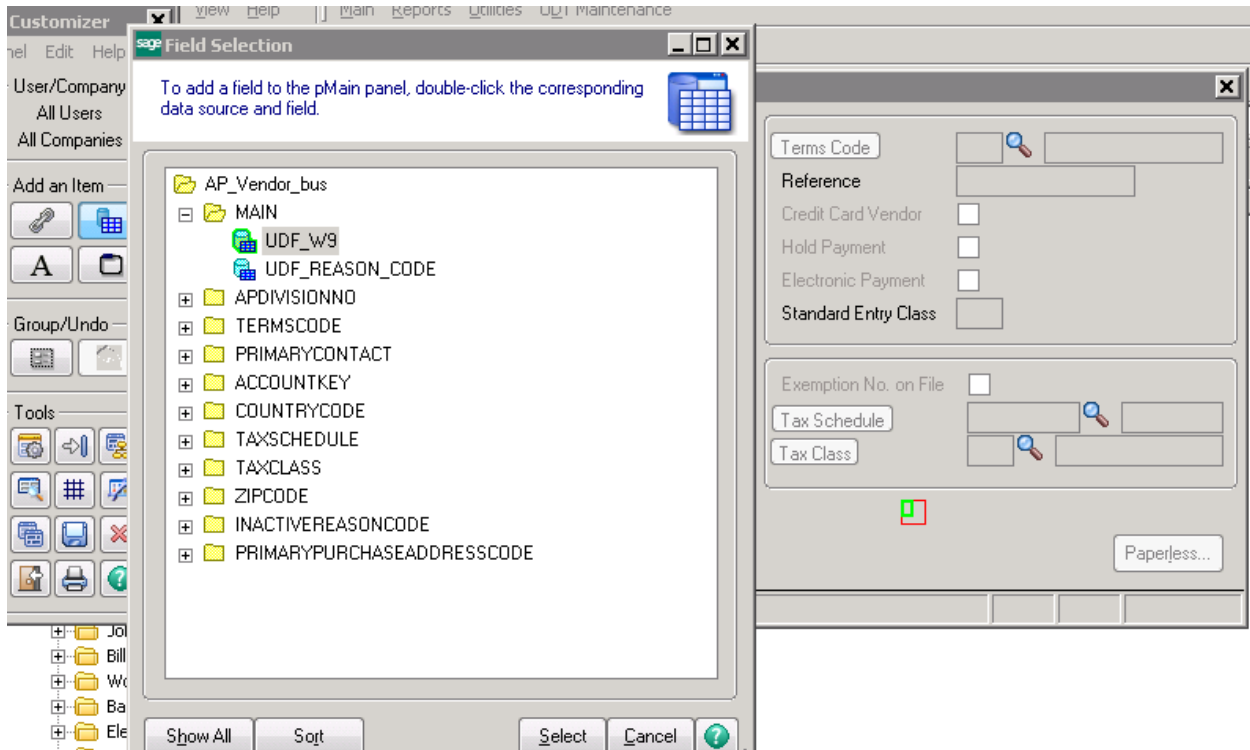
On the Customizer Panel Selection screen choose the user or ALL users, choose the company or ALL companies to add the field.



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



Draw your box on the screen where you would like your field to be, then select the field from the Field Section box.



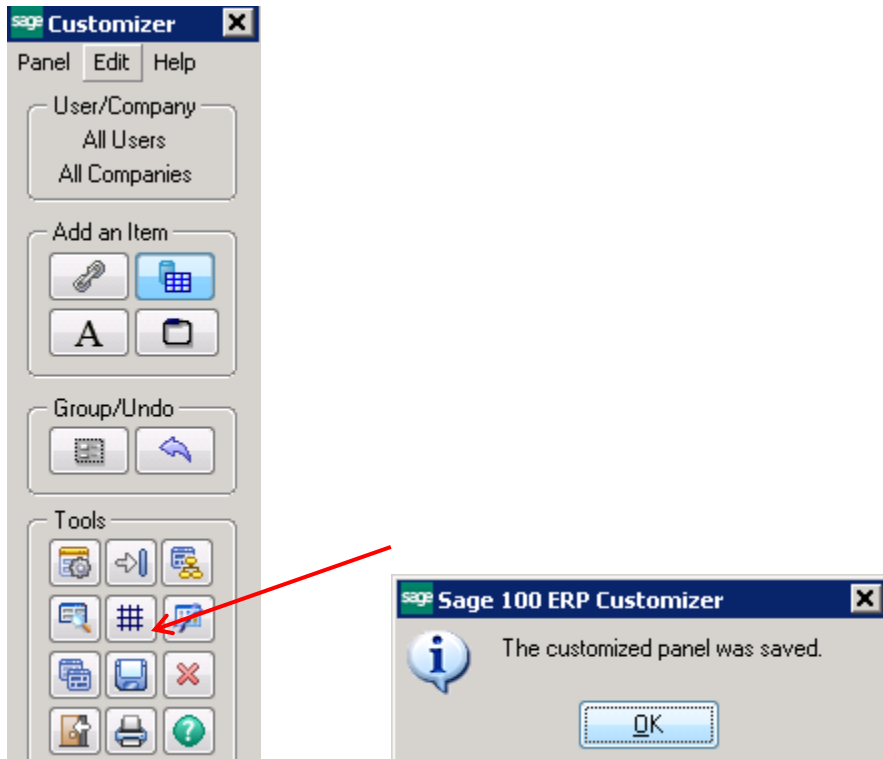
Add Additional field or fields.

The screenshot shows the 'Customize: AP_VENDOR.M4L - PMAIN [Main Folder]' window. It contains several sections of fields for customization:

- Address:** Multiple text input fields.
- ZIP Code:** Text input field.
- City:** Text input field.
- State:** Text input field.
- Country:** Text input field with a magnifying glass icon.
- Primary Contact:** Text input field with a magnifying glass icon.
- Telephone:** Text input field.
- Ext:** Text input field.
- Fax:** Text input field.
- E-mail Address:** Text input field with a magnifying glass icon.
- URL Address:** Text input field with a magnifying glass icon.
- Terms Code:** Text input field with a magnifying glass icon.
- Reference:** Text input field.
- Credit Card Vendor:** Check box.
- Hold Payment:** Check box.
- Electronic Payment:** Check box.
- Standard Entry Class:** Text input field.
- Exemption No. on File:** Check box.
- Tax Schedule:** Text input field with a magnifying glass icon.
- Tax Class:** Text input field with a magnifying glass icon.
- W9 Reason Code:** Check box and a dropdown menu.
- Paperless...:** Button.

At the bottom, there is a status bar that says 'Add UDF (71 , 18) [15 x 1.5]'.

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



The screen is now modified and shows the new fields.

The screenshot shows the Sage Vendor Maintenance (ABC) 4/4/2014 window. The window title bar includes the Sage logo and the text "Vendor Maintenance (ABC) 4/4/2014". The interface features a top navigation bar with tabs: 1. Main, 2. Additional, 3. Statistics, 4. Summary, 5. History, 6. Invoices, 7. Transactions, 8. Checks, and 9. P/Os. The "Main" tab is selected.

At the top, there are fields for "Vendor No." (01-AIRWAY) and "Name" (Airway Property). To the right of these fields are buttons for "Copy From...", "Renumber...", and "More...".

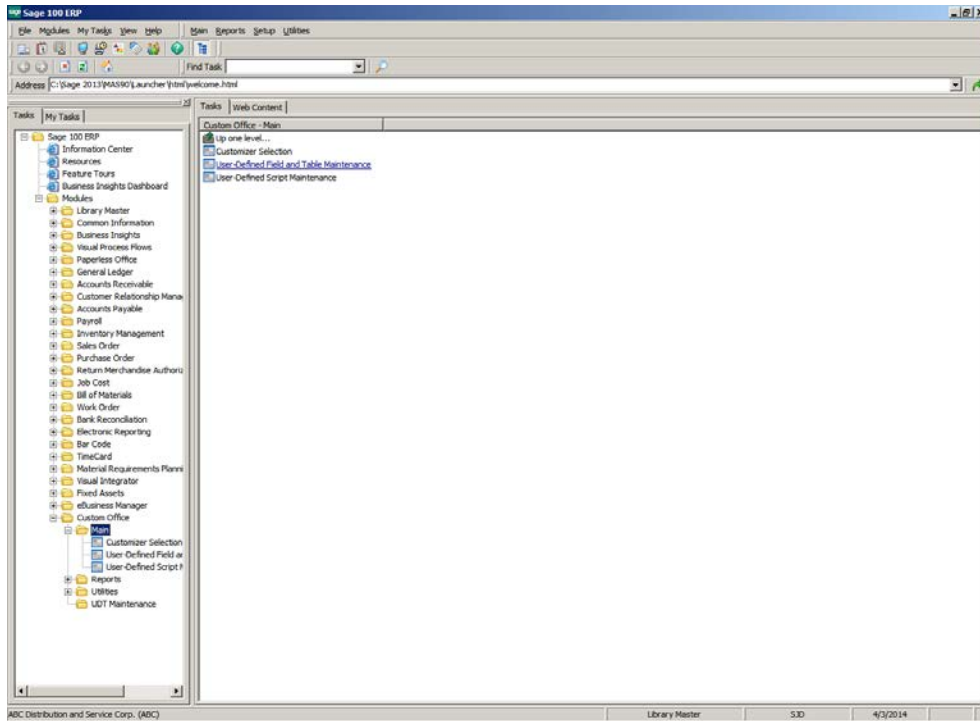
The main content area is divided into several sections:

- Address Section:** Includes fields for "Address" (7888 Saddlebush Trail), "Bank Building", "Suite 1008", "ZIP Code" (92669-0001), "City" (Orange), "State" (CA), "Country" (USA), and "United States of America".
- Contact Section:** Includes "Primary Contact" (LEO HENRY), "Leo Henry", "Telephone" ((714) 555-0980), "Ext" (5852), and "Fax" ((714) 555-0900).
- Communication Section:** Includes "E-mail Address" (lhenry@sage.sample.com) and "URL Address" (www.bestsoftwareinc.com).
- Payment and Terms Section:** Includes "Terms Code" (03), "NET END OF MONTH", "Reference", "Credit Card Vendor" (checkbox), "Hold Payment" (checkbox), "Electronic Payment" (checkbox), and "Standard Entry Class".
- Tax Section:** Includes "Exemption No. on File" (checkbox), "Tax Schedule" (NONTAX), and "Nontaxable T".
- W9 Section:** Includes a checked "W9" checkbox, "Reason Code" (Exempt), and a "Paperless..." button.

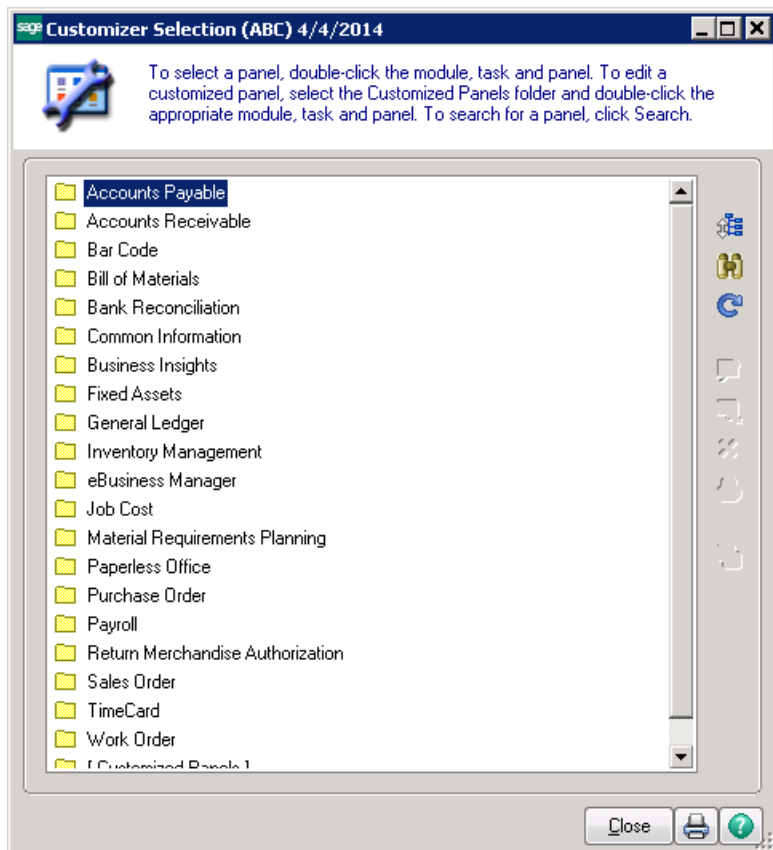
At the bottom of the window, there are buttons for "Accept", "Cancel", "Delete", a printer icon, and a help icon.

BONUS ROUND – How to Add a New Screen Tab

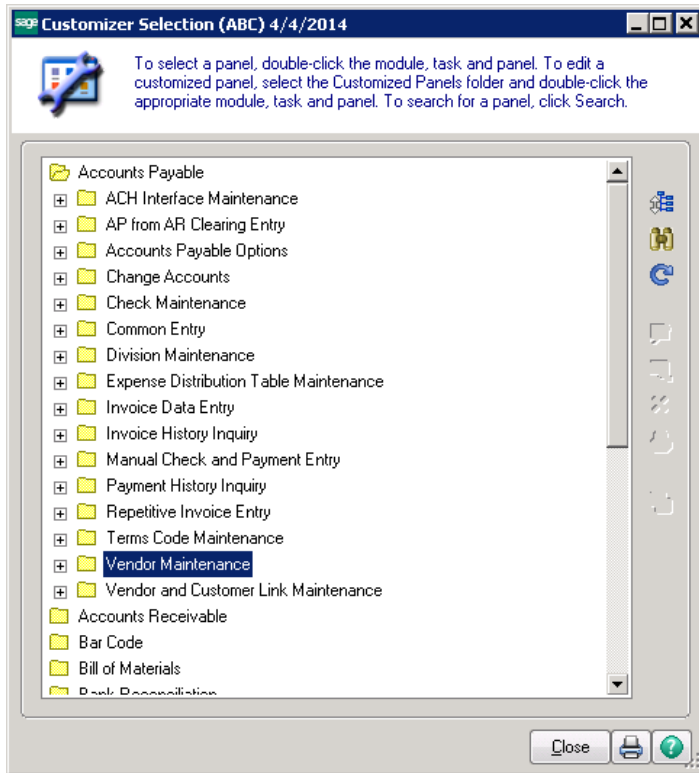
Click on Custom Office\Main. Select Customizer Selection.



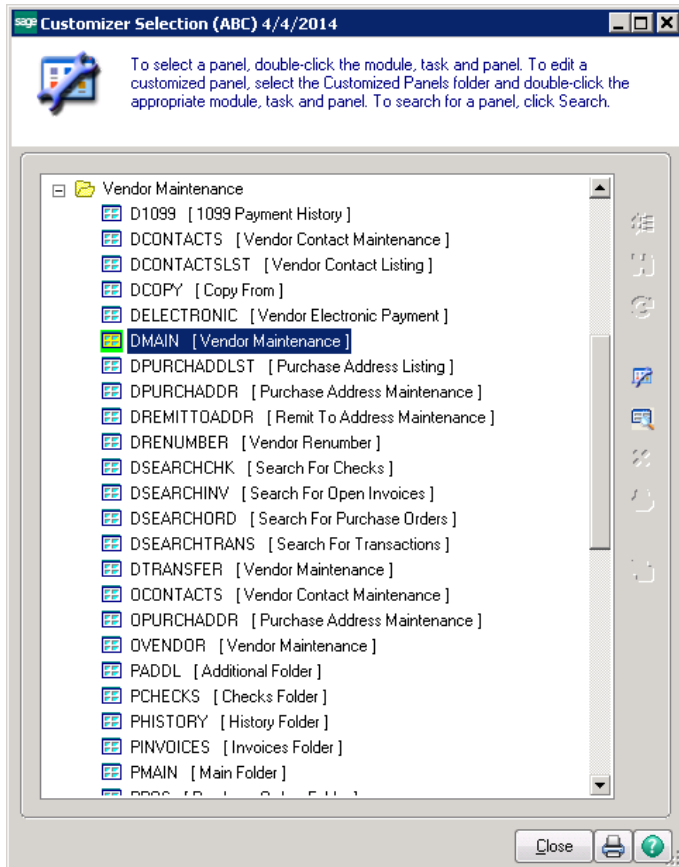
Click on the Module.



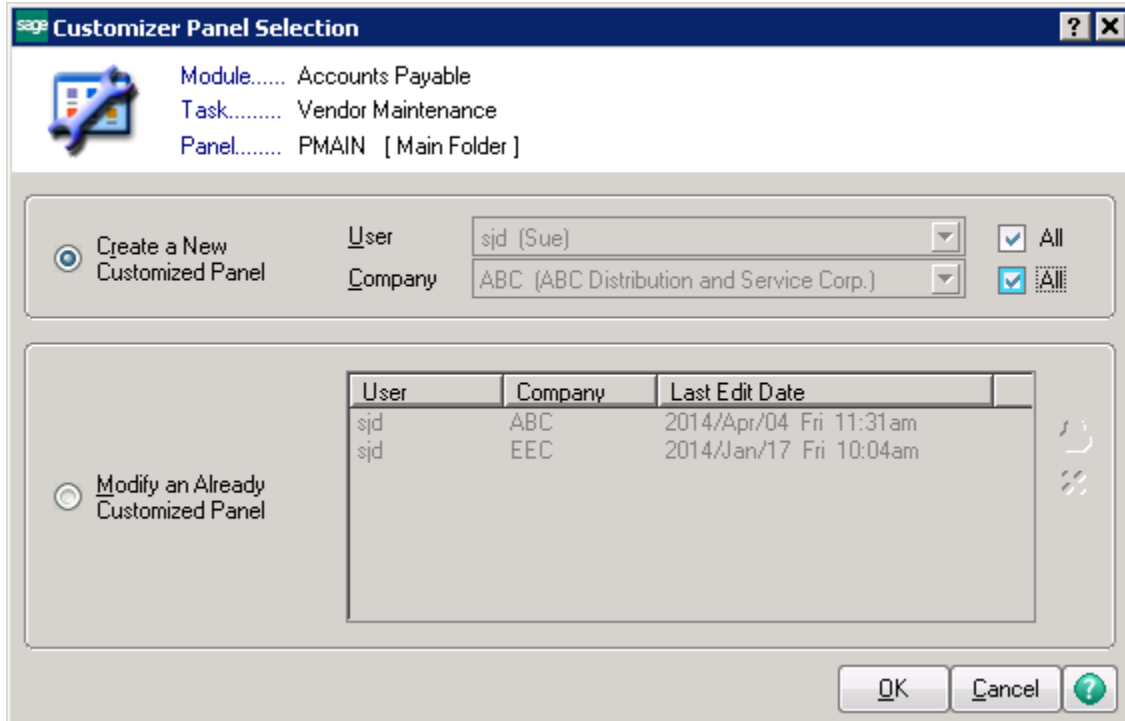
Click the Menu you want to add the field to.



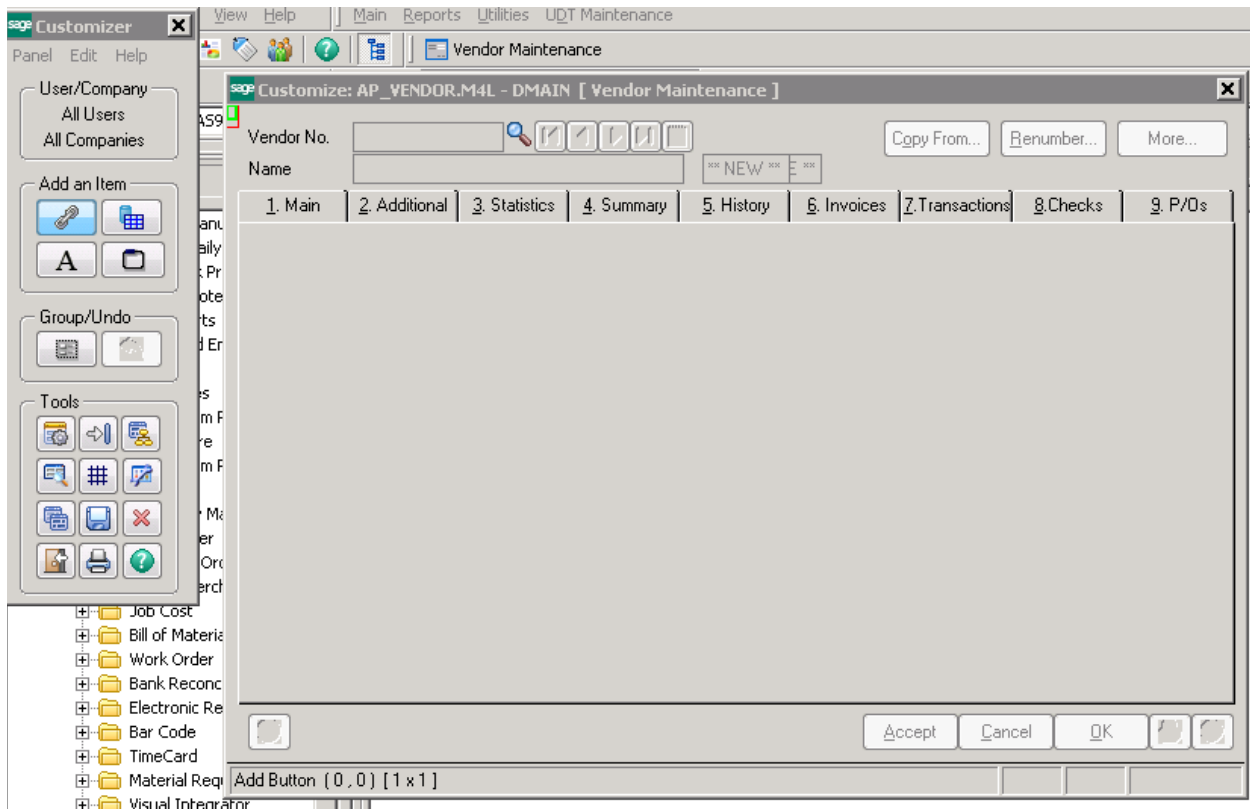
Choose the DMAIN Panel.



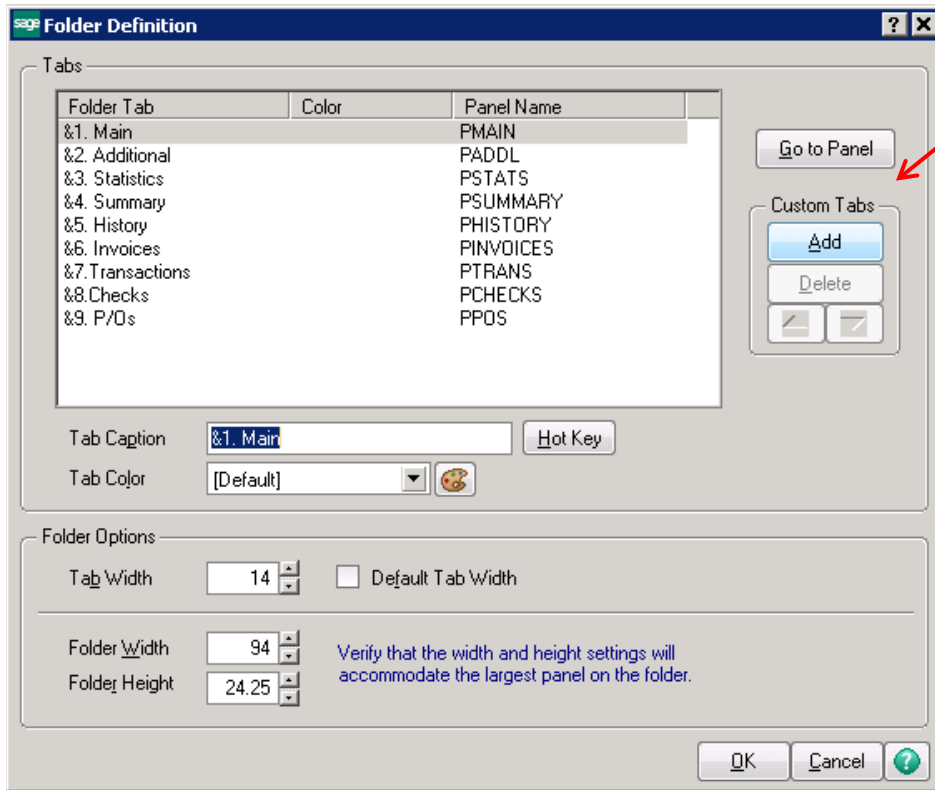
On the Customizer Panel Selection screen choose the user or ALL users, choose the company or ALL companies to add the field.



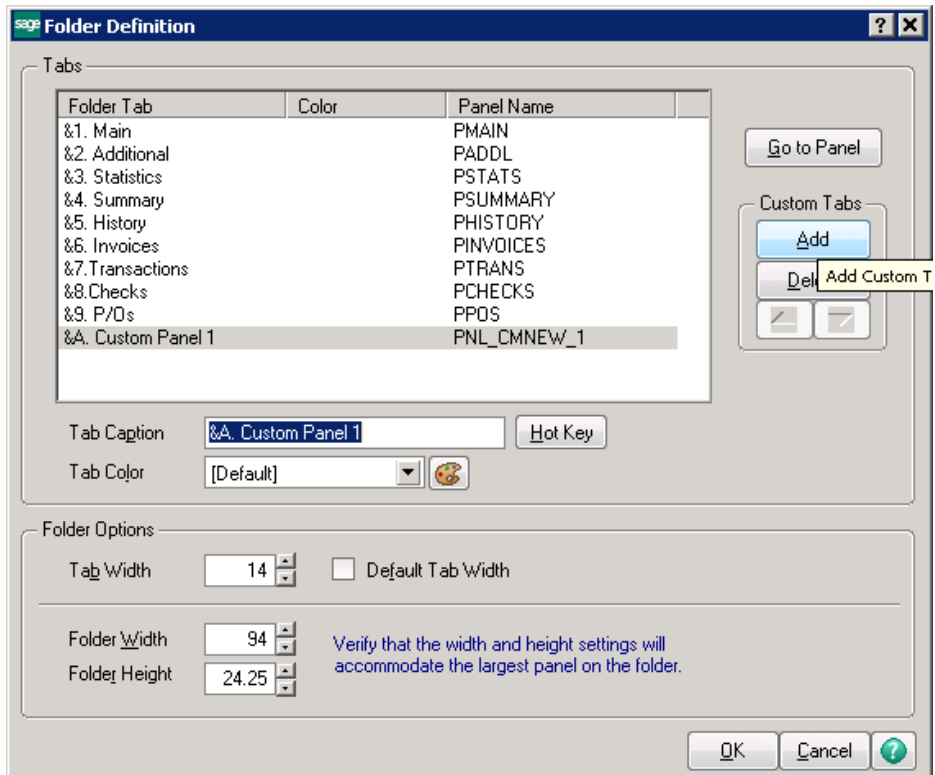
Right click in body of panel.



Click on the Add button.



Change Tab Caption name to the name of the new tab.



Click OK.

Folder Definition

Tabs

Folder Tab	Color	Panel Name
&1. Main		PMAIN
&2. Additional		PADDL
&3. Statistics		PSTATS
&4. Summary		PSUMMARY
&5. History		PHISTORY
&6. Invoices		PINVOICES
&7. Transactions		PTRANS
&8. Checks		PCHECKS
&9. P/Os		PPOS
&A. Info		PNL_CMNEW_1

Go to Panel

Custom Tabs

Add

Delete

Tab Caption: &A. Info Hot Key

Tab Color: [Default]

Folder Options

Tab Width: 14 Default Tab Width

Folder Width: 94

Folder Height: 24.25

Verify that the width and height settings will accommodate the largest panel on the folder.

OK Cancel ?

Customize: AP_VENDOR.M4L - DMAIN [Vendor Maintenance]

Vendor No.

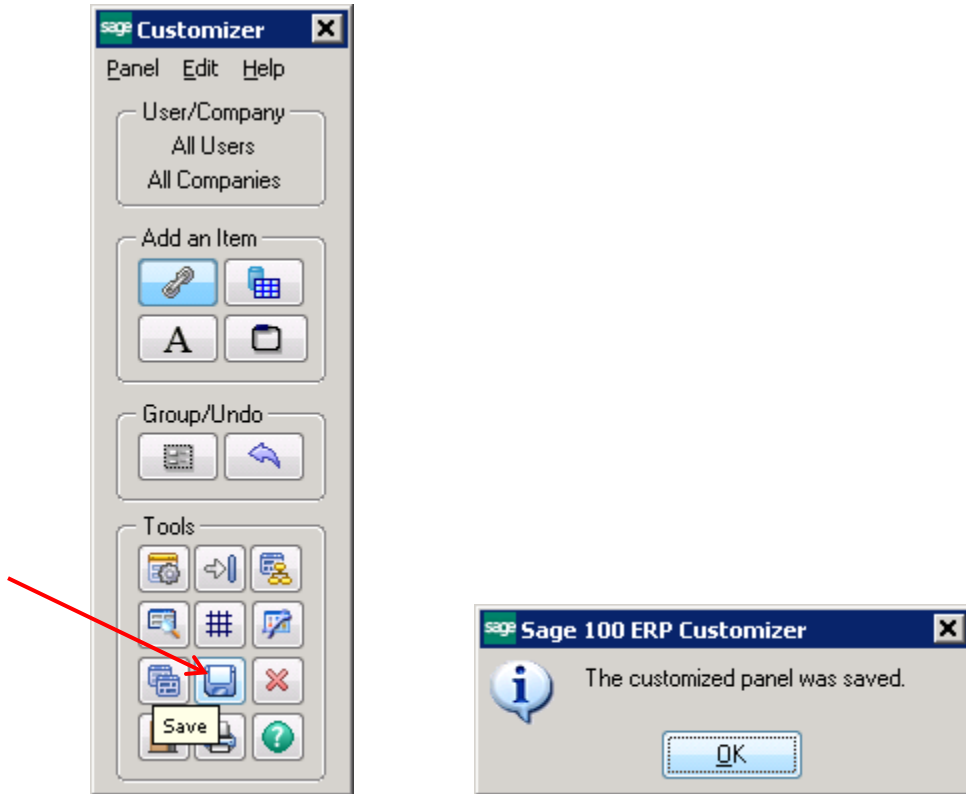
Name

1. Main	2. Additional	3. Statistics	4. Summary	5. History	6. Invoices	7. Transaction	8. Checks	9. P/Os	A. Info
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Accept Cancel OK

FOLDER - Folder (1 , 4) [94.1 x 24.25]

Click the Save button on the Customizer toolbar.



The new tab will now be available on the panel.

