

Custom Fields

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Allow unlimited number of custom fields to be created and then be seen in most documents in the system

Add as many custom fields as you require for additional information.

Custom Fields give you the flexibility to add Specific Information to your customer, Suppliers and User List

It Helps you add and track additional data on items

The customized information can be included in your forms and reports.

The screenshot shows the 'Custom Fields' configuration window. On the left is a sidebar with a navigation menu under 'Administration'. The main area has tabs for 'Custom Fields', 'Category', and 'Entity Links'. Below the tabs are input fields for 'Custom Label' and a 'Control Type' dropdown menu. At the bottom is a table listing existing custom fields.

Administration Menu:

- Company Profiles
- Defaults
- Financial Periods Setup
- Backups
- Multicurrency
- Multilingual
- Custom Fields
- Reference Values
- Custom Period Setup**
- Imports
- Emailing Schedule Setup
- Export Schedule
- POS Setup

Custom Fields Configuration:

Search, Add, Edit, Delete, Convert

Custom Label:

Control Type:

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#	Custom Label	Control Type	Display	Value	Width
1	Cashier	Textbox			100
2	Colour	Dropdown	Black,Galv,Silver	Black,Galv,Silver	250
3	Drawn By	Textbox			250
4	Gauge	Dropdown	.55,.60,.65	.55,.60,.65	
5	Material	Dropdown	Galv,Steel	Galv,Steel	250
6	MG Flag	Checkbox			
7	Models	Dropdown	Escort,Fiesta,Focus,Mo...	Escort,Fiesta,Focus,Mo...	30
8	PO Number	Textbox			300

Add a custom field

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Custom field set up for a checkbox.

I am creating this custom field so that I can set it up against my customers, to distinguish between different categories of customers.

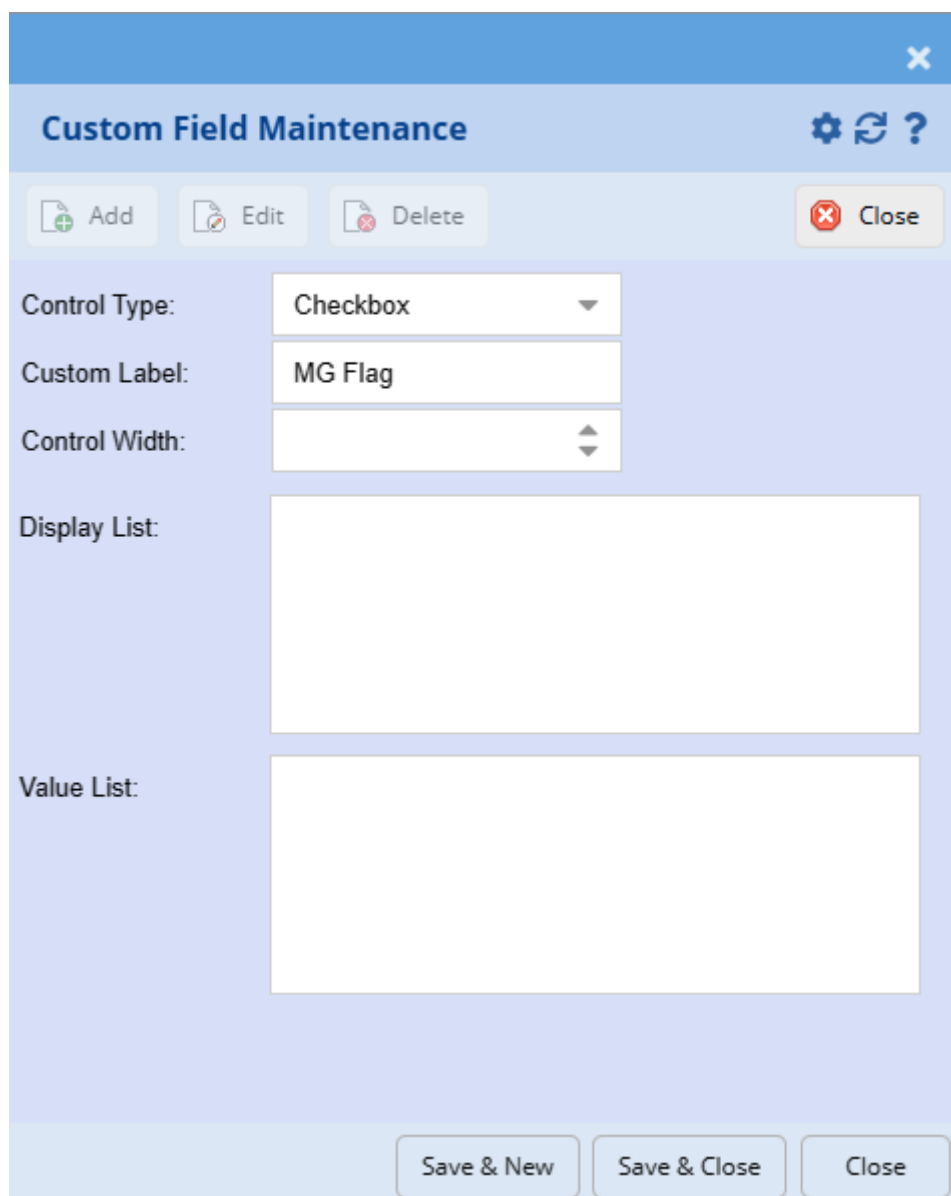
I want to use a checkbox in this case.

First add the custom field and indicate what type of control type it is and whether it be a checkbox or text box.

You can go and create a category that allows you to break up further dropdowns on your custom fields. this is not a requirement however if you have a lot of custom fields it's better to categorize them.

The next tab that you need to go to is the entity links that means you need to link the custom field that you created to somewhere in the system.

You can link one custom field to multiple places in the system, example customer set up, supplier setup an inventory setup using the same custom field.



The image shows a software window titled "Custom Field Maintenance". At the top right of the title bar is a close button (X). Below the title bar is a toolbar with four buttons: "Add" (with a plus icon), "Edit" (with a pencil icon), "Delete" (with a trash icon), and "Close" (with a red X icon). The main area of the window contains several form fields: "Control Type:" with a dropdown menu showing "Checkbox"; "Custom Label:" with a text input field containing "MG Flag"; "Control Width:" with a vertical spinner control; "Display List:" with a large empty text area; and "Value List:" with another large empty text area. At the bottom of the window are three buttons: "Save & New", "Save & Close", and "Close".

Custom fields on stationery

In Custom Fields under the Entity Links Tab. Click on the Entity in the drop down that you require and click on search.

Find the custom field that you do not want to appear on the printable documentation and click on Amend.

Take the tick off the Printable tick and click on Save and Close.

The screenshot shows the 'Custom Fields' interface with the 'Entity Links' tab selected. The background interface includes a toolbar with 'Search', 'Add', 'Edit', 'Delete', and 'Convert' buttons. Below the toolbar are three tabs: 'Custom Fields', 'Category', and 'Entity Links'. The 'Entity Links' tab is active, showing a form with 'Entity:' set to 'Debtors', 'Category:' set to 'All', and 'Control Type:' set to 'All'. Below this is a table with three columns: '#', 'Custom Label', and 'Control Type'. The table contains three rows: 1. 'DebtorsColour' (Dropdown), 2. 'DebtorsDrawn By' (Textbox), and 3. 'DebtorsRanger XXXXX...' (Textbox). A modal dialog box titled 'Entity Link' is open in the foreground. It has a close button (X) in the top right corner. The dialog contains the following fields: 'Entity:' (Debtors), 'Category:' (All), 'Field:' (Colour), 'Sequence No:' (2), and 'Printable On Document:' (unchecked checkbox). At the bottom of the dialog are three buttons: 'Save and New', 'Save and Close', and 'Close'.

#	Custom Label	Control Type
1	DebtorsColour	Dropdown
2	DebtorsDrawn By	Textbox
3	DebtorsRanger XXXXX...	Textbox

Entity Link

Entity: Debtors

Category: All

Field: Colour

Sequence No: 2

Printable On Document: ☐

Save and New Save and Close Close

By removing the tick on the Printable label this will mean that when printing the document for the customer is will not see that custom field.