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DataCollection Mobile User Fields

Megan De Freitas - 2024-11-22 - <u>Setup</u>

Overview

DataCollection allows users to update user fields from a mobile device. User fields are currently available on the following mobile screens:

- Picking
- Packing
- Receiving
- Lot Attributes Editor
- Serial List Editor

Security

To enable user fields on mobile screens, navigate to Modules > System > Security Editor in DC console and make sure the appropriate screens are enabled. You will also need to set whether user fields can be viewed and/or edited.

Enabled	Plugin Name	
	*mobile picking	
V	Mobile Picking*	
× 🗸 C	ontains([Plugin Name] , 'mobile picking') 💌	
⊿ Miso	1	
Can E	Edit Sales Document UDFs	True
Can E	Edit Sales Line Item UDFs	True
Can V	View Sales Line Them LIDEs	True
Curr		i i i i i i i i i i i i i i i i i i i
Enabled	Plugin Name	
	*mobile lot attributes	
1	Mobile Lot Attributes*	
× 🗸 C	ontains([Plugin Name], 'mobile lot attributes') 🔻	
4 Mice		
Can I	- Edit Lot UDFs	True
Can	View Lot UDFs	True

Enabled	Plugin Name	
	*mobile serial list	
	Mobile Serial List*	
x	antains/[Dhuain Nama] 'mahile carial list') 💌	
	contains(programming), mobile schemise)	
⊿ Mise	c c	
Can	Edit Serial UDFs	True
Can	View Serial UDFs	True

Settings

To access application settings in DC console, navigate to Modules > System > Settings.

Enable Updating SalesPad Future Lot User Fields - DataCollection has the ability to update SalesPad lot user fields that are not in the system yet during receiving. This functionality is not enabled by default and requires SalesPad to be installed on the database. To enable DC to update SalesPad future lot user fields, set this setting to True.

SalesPad Image UDF File Path – This is the file path where SalesPad user field images will be stored. It is recommended for this file path to be a shared network location available to all desktop workstations.

User Field Editor

Visible On Mobile

In order for user fields to show up on SalesPad Mobile, they need to be marked as visible on mobile. In The DC Console, navigate to Modules > System > User Field Editor. Select the business object on the left that has the desired user field, select the field name, and then click the **Edit** button. Make sure the Visible On Mobile Device checkbox is checked, click **OK**, then click **Save** to save your changes.

	User Field Editor ×
Table Name	ItemSerialLotAttribute_X
Field Name	xColor
Caption	Color
Control Type	Text Editor 🗸
System Type	Text 👻
Sql Data Type	Text 👻
Length	255
	A
Options	
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	A
Report	
	· · · · · · · · · · · · · · · · · · ·
	Disabled
	Visible On Mobile Device
	OK Cancel

SalesPad Desktop User Fields

DataCollection can read and write to SalesPad user fields. The User Field Editor will load both DC and SalesPad user field (extended) tables that are currently supported.

DC user field tables end with a $_X$ suffix. For example, ItemSerialLotAttribute $_X$ is a user field table for serial lot attributes.

SalesPad user field tables start with an spx prefix. For example, spxSalesDocument is a user field table for sales documents.

User Field Editor 🗙					
📑 Close 🛛 📙 Save 🛛 🕞 Update Data	abase Table				
User Field Tables	User Fields				
BinAttribute_X ItemMaster_X	😮 New 🔞 Delete 📝 Edit				
spxItemMaster	Field Name	Control Type			
spxInventoryLotNum	xColor	Text Editor			
Package_X PurchaseLineItem X					
spxPurchaseLineItem					
PurchaseOrder_X soxPurchaseOrder					
SalesDocument_X					
spxSalesDocument					
SalesLineItem_X					
spxInventorySerialNum					

Modules

Picking

User fields on the Picking screen are available on Doc and Item fields. To access the mobile User Field Editor, select the **ellipsis** button on the Doc field for sales document user fields, or the Item field for sales line item user fields.

🚑 Data(ollection	⊠ ∔	† 7 _×	√ € ok
🛄 🔻 Picki	ng			
Doc#:	ORD1046			
<u>Item:</u>				
<u>S/L:</u>				
<u>Bin:</u>				
Qty:		UoM:	Each	~
<u>Site:</u>	WAREHOU	JSE		
Item: A1 Qty Ord: 1 To Pick: 1 Def Bin: BI Bins: BI	100, Audio Sy Tota N2 N1	/stem To Pick:	1	
Fabrikam MB	Inc. 4IS	AMALBAS	5Alsa	1.0.0.0
Clear	2	¥.	Sub	mit

Packing

User fields on the Packing screen are available on the Pkg field. To access the mobile User Field Editor, select the **ellipsis** button on the Pkg field for package user fields.

🚰 Data	Collection	÷	۲ _x	€ ok
🛄 Packing]			
Doc#:				
<u>Pkg#:</u>		+		•
<u>Item:</u>				
<u>S/L:</u>				
Qty:		UoM:		~
<u>Site:</u>	WAREHOU	JSE		
Note:				0
Cmpl:				
Fabrikam MB	Inc.	SINIS	iA'lsa	99.9.2.4
Clear	Æ	<u>щ</u>	Sub	mit

Receiving

User fields on the Receiving screen are available on PO and Item fields. To access the mobile User Field Editor, select the **ellipsis** button on the PO field for purchase order user fields, or the Item field for purchase line item user fields.

🚰 Data	Collection 🕂 🛱	Y <mark>x</mark> € ok
🔲 🔻 Rece	eiving	
<u>PO#:</u>	I	
Item:		
S/L:		
Qty :	UoM:	~
<u>Bin:</u>		
<u>Site:</u>	WAREHOUSE	
Fabrikam MB	Inc. SINISA's	a 99.9.2.4
Clear		Submit

Lot Attributes

Lot user fields are available on all mobile screens that support editing of lot attributes. The Lot Attributes Editor is accessed by tapping the **ellipsis** button on the Lot field.

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🛄 Invent	🛄 Inventory Adjustments						
Item:	CAP100)					
Lot:	LOT A						
<u>Bin:</u>							
Qty:		+/-	UoM:	Each	-		
<u>Site:</u>	WAREH	IOUSE	=				
Reason:					~		
Note:					0		
Item Desc: Capacitor							
Fabrikam MB Inc. SINISA\sa 99.9.2.4							
Clear				Subli	III.		

To open the User Field Editor, tap the $\ensuremath{\textbf{User Fields}}$ button.

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🛄 Lot Attributes							
Distributor:							
Wire							
Attribute 3:							
Receipt	1900/01/01	•					
Date 2:	1900/01/01	Ŧ					
Exp Date:	1900/01/01	•					
Mfg Date:	1900/01/01	-					
Item: WIRE-MCI	D-0001, Lot #: 1						
User Fields	ОК	Cancel					
Fabrikam MB Inc.	(ISAMALBA)	5A\sa 1.0.0.0					
Clear		Submit					

Serial List

Serial user fields are available on all mobile screens that support editing serial lists. The Serial List Editor is accessed by tapping the **number** button on the Serial field.

🚑 Data	Collectio	n	42	$\overline{Y}_{\mathbf{x}}$	√ € ok
🛄 Invento	ory Adju	stme	nts		3
Item:	100XLG				
<u>Serial:</u>					3
<u>Bin:</u>					
Qty:	3	+/-	UoM:	Each	ר 🔻
<u>Site:</u>	WAREH	OUSE	=		
Reason:					~
Note:					0
Item Desc: Green Phone					
Fabrikam MB Inc. SINISA\sa 99.9.2.4					
Clear 🔤 Submit					

To open the User Field Editor, tap the \boldsymbol{User} Fields button.

餐 Seria	l List	Ø	#	Y _x ⊀€	ok
User Field	is D	样 elete All		X Delete	
Serial Nu	mbers				
1 2					
3					
•					
	c	к		Cancel	

Mobile User Field Editor

The Mobile User Field Editor allows users to update user fields on the mobile device. Note that only user fields that are set to visible on mobile and are not disabled will show up in the editor.

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📃 User Fi	eld Editor	_					
Color	Blue						
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4	III	►					
		-					