

Knowledgebase > Inventory Manager (fka DataCollection) > Setup > User Defined Fields Editor

User Defined Fields Editor

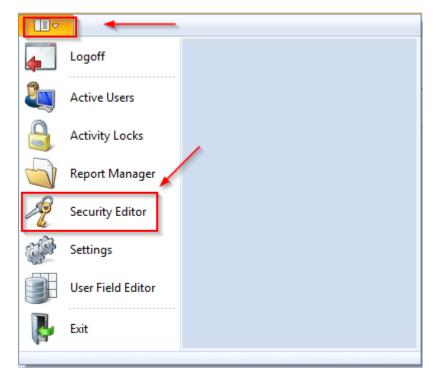
Megan De Freitas - 2024-11-22 - <u>Setup</u>

Overview

DataCollection allows users to create User Defined Fields similar to how SalesPad GP does. This documentation covers creation and modification of User Defined Fields in DataCollection.

Security

To enable the User Field Editor, first click the **SalesPad** dropdown and click Security Editor.



This will bring you to the Security Editor menu.

Recurity Edi	litor ×								
👕 Close 🛛 💭 Save 🛛 🔀 Reset Database Version 🛛 🛃 Refresh Licenses									
System Users				System Groups					
🕒 New 🛛 🔕 Delete				🔂 New 🛛 🐼 Delete	Security:	📄 Copy Security 🛛 😻 Export Security 🌱 👋			
User Name		Security Group		Security Group	Enabled	Plugin Name			
convergence		Admin		Admin	V	Active Users			
sa		Admin			V	Activity Locks*			
salespad		Admin			V	Allocation Monitor			
					V	Settings			
					V	Bin Lookup			
					V	Customer Inventory			
					V	Customer Warehouse Configuration			
User Name	converge	nce				Database 11-data *			
Password	•••••	•••							
Display Name									
	Locke	d							
	Reset	Password Next Logir	1						
Security Group	Admin		-						

Search for and enable User Field Editor.

Security:	📄 Copy Security 🛛 🥪 Export Security 🛛 🧐 Import Security 🛛 🐨 Enable All Settings
Enabled	Plugin Name
	User Field Editor
V	User Field Editor
	₩2
× 🗸 S	tarts with ([Plugin Name], 'User Field Editor') 💌 Edit Filter

Usage

Creating a New User Field

To create a new user field, click User Field Editor to pop open the UDF editor menu.



The UDF editor will open and you will be able to see User Field Tables in DataCollection and those created in SalesPad. UDFs from SalesPad are donated as .spx files.

Note: For more information on UDFs in SalesPad, please see our documentation.

🗊 User Field Editor 🛛 🗙								
🗋 Close 🛛 🚽 Save 🛛 👺 Update Database Table								
All currently logged in users will need to log out for any recent user field changes to properly take effect.								
User Field Tables	User Field Tables User Fields							
spxItemMaster ItemMaster X	🚯 New 🔞 Delete 📝 Edit							
ItemSerialLotAttribute_X spxPurchaseLineItem	Field Name	Control Type	Caption	Disabled				
PurchaseLineItem_X	xBlocked_Item xCustomerNumber	Checkbox Editor	Blocked Item		≡			
PurchaseOrder_X spxPurchaseOrder		Text Editor	Customer Item Number					
	xData_Sheet	File Attachment	Data Sheet					
	xDrilling	Text Editor	Drilling					
	xExtended_Item_Description	Text Editor	Extended Description					
	xFeature	Text Editor	Feature					
	xIngredient1	Text Editor	Ingredient 1					
	xIngredient2	Text Editor	Ingredient 2		-			

1. To create a new User Field, click on the User Field table you would like to add a UDF to.

User Field Tables
ItemMaster_X
spxItemMaster
ItemSerialLotAttribute_X
spxPurchaseLineItem
PurchaseLineItem_X
PurchaseOrder_X
spxPurchaseOrder

2. Click New on the action toolbar.

User Fields	User Fields					
🔁 New 🕺 Delete 📝 Edit						
Field Name	Control Type	Caption	Disabled			
xColor	Text Editor	color				
xTest	Text Editor	test				

3. The "User Field Editor" will open. This contains various fields that can alter what will appear on the

different User Fields.								
	User Field Editor	~						
Table Name	ItemMaster_X							
Field Name								
Caption								
Control Type	Text Editor							
System Type	Text	-						
Sql Data Type	Text	-						
Length	255							
-								
Options								
opuono		-						
Report								
		-						
	Disabled	_						
Visible On Mobile	Visible On Mobile Device							
		_						
	OK Cancel							
Table Name – Wh	at table the field will appear on							
Field Nome Why								
	at the name of the UDF will be							
Caption – The des	scription for the user field							
Caption – The des Control Type – De		Ŧ						
Caption - The des Control Type - De Control Type	scription for the user field etermines what the UDF will be	•						
Caption - The des Control Type - De Control Type System Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor	•						
Caption - The des Control Type - De Control Type System Type Sql Data Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment	•						
Caption - The des Control Type - De Control Type System Type Sql Data Type Length	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo	T						
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Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De System Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text							
Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De System Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text Text DateTime							
Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De System Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text							
Caption - The des Control Type - De Control Type System Type Sql Data Type Length Options System Type - De System Type Sql Data Type Length	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text Text DateTime							
Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De System Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text Text DateTime							
Caption - The des Control Type - De Control Type System Type Sql Data Type Length Options System Type - De System Type Sql Data Type Length	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Checked Combo Box Editor Text Text Text DateTime							
Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor termines the functionality of the UDF Text Text DateTime Integer							
Caption - The des Control Type - De System Type Sql Data Type Length Options System Type - De System Type - De	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor Image Checked Combo Box Editor Image Etermines the functionality of the UDF Text Text DateTime Integer							
Caption - The des Control Type - De Control Type System Type Sql Data Type Length Options System Type - De System Type - De System Type - De System Type Sql Data Type Length Options SQL Data Type - I Sql Data Type	scription for the user field etermines what the UDF will be Text Editor Text Editor Checkbox Editor File Attachment Memo Image Radio Group Checked Combo Box Editor termines the functionality of the UDF Text Text DateTime Integer							

Length – Determines the length of the UDF Options - Value Options from the User Field Editor of SalesPad Report – Quick Report if one has been added to that field in the SalesPad User Field Editor Disable – Disables the field

Visible on Mobile - Indicates whether the UDF will be available on mobile or not

4. Enter the information of how you want your User Field setup. For this example, we will add a User Field to the ItemMaster_X table. We will be adding a Model Number to the Item Master. The Caption field will be the text displayed.

	User Field Editor	×
Table Name	ItemMaster_X	
Field Name	xModelNumber	
Caption	Specific Model No	
Control Type	Text Editor	-
System Type	Text	-
Sql Data Type	Text	-
Length	255	
		*
Options		
		•
		-
Report		
		÷
	Disabled	
Visible On Mobile	Visible On Mobile Device	
	OK Cancel	

As you can see, we have created this as a text field by using the Control Type, System Type, and SQL Data Types as text.

Note: Make sure you denote x before you enter the field name of your UDF. This is a standard and will help the system avoid confusion with fields that are pre-defined and not custom.

5. Your User Defined Field will now appear in the User Fields menu.

User Fields	ser rieus						
😮 New 🔞 Delete 📝 Edit							
Field Name	Control Type	Caption					
xColor	Text Editor	color					
xmodelnumber	Text Editor	Specific model no					
xTest	Text Editor	test					
· · · · · · · · · · · · · · · · · · ·							

6. Click Save when you are done with your User Field

🗊 User F	ield Editor	×	
Close	📙 Save	ĺ,	Update Database Table
			- 11

7. Next, click Update Database Table

User Field Edite	or >	×					
📑 Close 🛛 📙 Sa	ve	B	Up	date	Data	base	Table

8. Click Logoff from the SalesPad dropdown for your changes to take effect

		-
4	Logoff	

- 9. Log back into DataCollection
- **Note:** If you do not log off and log back on, your changes will not properly take effect. This can also lead to other problems with DataCollection and reading UDFs.
- 10. Click the appropriate tab for your UDF. Since we have added one to the ItemMaster_X table, we will go to the Item Master in Inventory Lookup



11. Go to the section on the card. In this example we will go to the Inventory Lookup specific tabs and then open Item User Fields



Deleting a User Field

To delete a User Field, before you have saved it, click Delete

User Fields			
Field Name 🔺	Control Type	Caption	Disabled
xColor	Text Editor	color	
xTest	Text Editor	test	

Note: You cannot delete a User Field that has been saved. You will receive this error message.

Informational	×
Cannot Delete	
You cannot delete a user field that has been saved. You should disable the field.	
ОК	

Editing a User Field

To edit a User Field, click the **Edit** button.

User Fields			
🕀 New 🛛 🐼 Delete 📝 Edit			
Field Name	Control Type	Caption	Disabled
xColor	Text Editor	color	
xTest	Text Editor	test	

This will bring you to the User Field Editor menu.

	User Field Editor ×	
Table Name	ItemMaster_X]
Field Name	xTest	j
Caption	Test	
Control Type	Text Editor 👻	
System Type	Text 👻	
Sql Data Type	Text -	
Length	255	
Options		
	· · · · · · · · · · · · · · · · · · ·	
	· · · · · · · · · · · · · · · · · · ·	
Report		
	Disabled	1
Visible On Mobile 🗹 Visible On Mobile Device		
visible on Mobile		
	OK Cancel	

Here there are a variety of options to change the User Field. You can use the options mentioned in <u>Creating a</u> <u>New UserField</u> section of this documentation to alter UDFs.

Disabled Column

DataCollection UDF's have the power to disable User Fields. However, you cannot do this from just the menu. The check boxes in the screenshot below cannot be clicked.

Disabled	

1. To disable the field, first select the User Field you would like to disable and hit ${\bf Edit}.$

User Fields		
🕀 New 🛛 🔕 Delete	📝 Edit	
Field Name		•
xModelNumber		
5		

2. Click on **Disabled** when in the User Field Editor

	User Field Editor	×
Table Name	ItemMaster_X	
Field Name	xModelNumber	
Caption	Specific Model No	
Control Type	Text Editor	~
System Type	Text	Ŧ
Sql Data Type	Text	~
Length	255	
		*
Options		
		•
		•
Report		
		÷
		_
Visible On Mobile	Visible On Mobile Device	
hable on hobile		_
	OK Cancel	

3. Click OK

	User Field Editor	<
Table Name	ItemMaster_X	
Field Name	xModelNumber	
Caption	Specific Model No	
Control Type	Text Editor	r
System Type	Text	r
Sql Data Type	Text	r
Length	255	
	1	
Options		
	v	r
Report		
	Disabled	
Visible On Mobile	Visible On Mobile Device	
	OK Cancel	

4. You will now see a check mark in the check box on the Disabled column.

Disabled	
V	