



User Defined Fields Editor

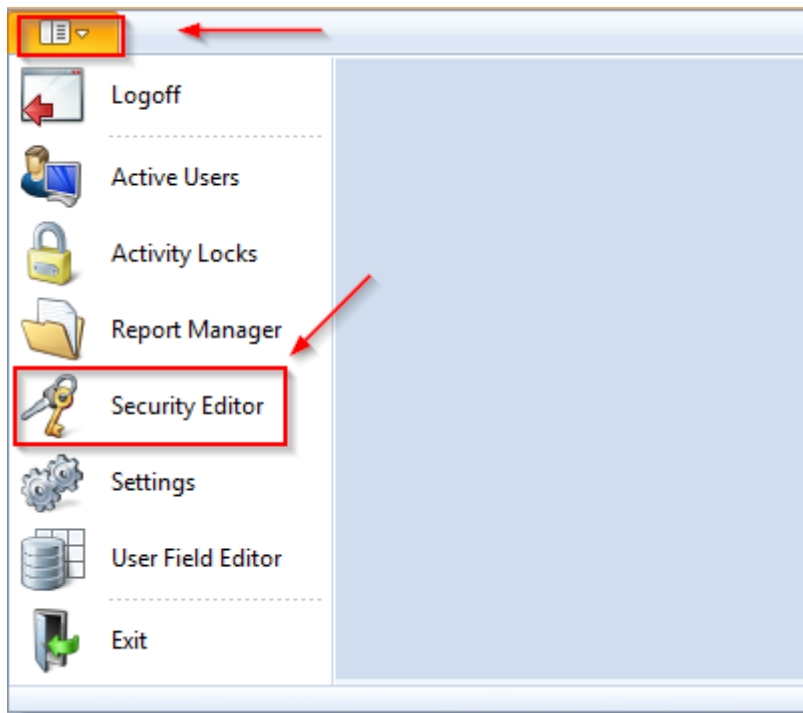
Megan De Freitas - 2024-11-22 - Setup

Overview

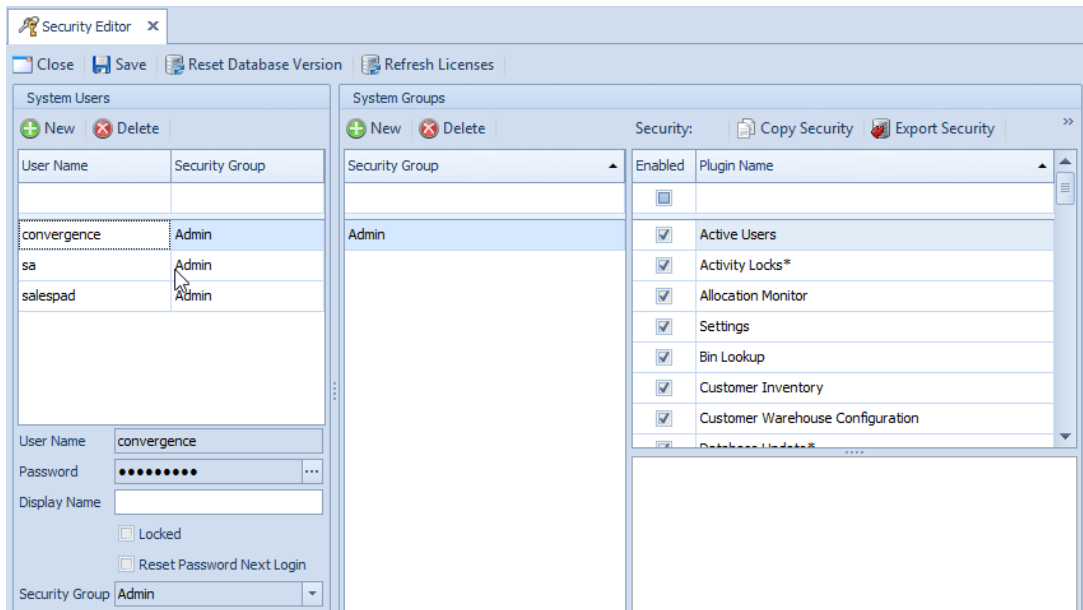
DataCollection allows users to create User Defined Fields similar to how SalesPad GP does. This documentation covers creation and modification of User Defined Fields in DataCollection.

Security

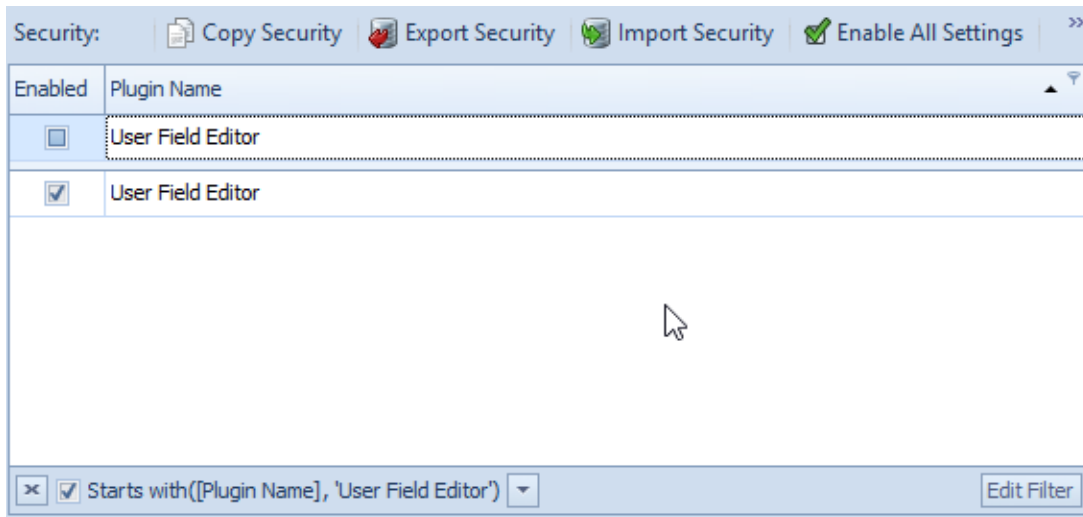
To enable the User Field Editor, first click the **SalesPad** dropdown and click Security Editor.



This will bring you to the Security Editor menu.



Search for and enable *User Field Editor*.



Usage

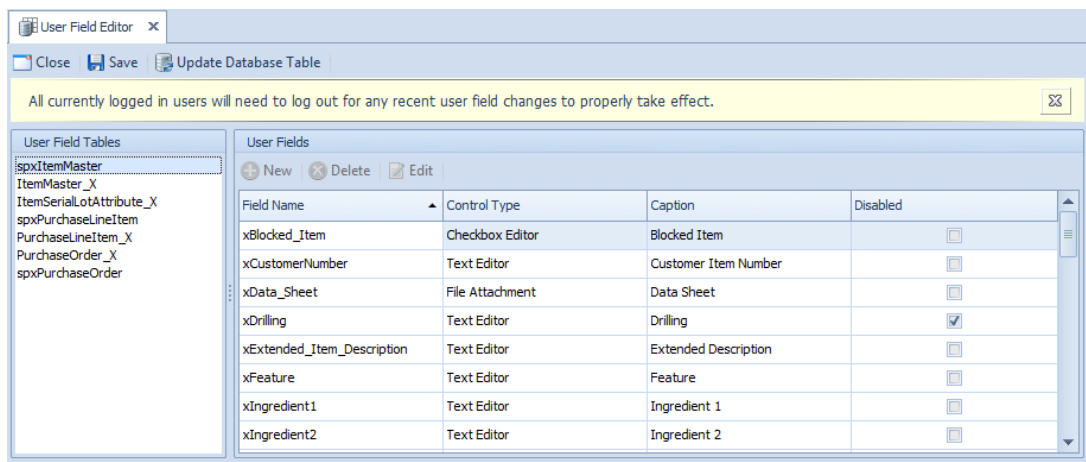
Creating a New User Field

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

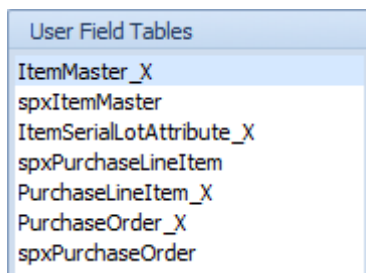


The UDF editor will open and you will be able to see User Field Tables in DataCollection and those created in SalesPad. UDFs from SalesPad are donated as .spx files.

Note: For more information on UDFs in SalesPad, please see our [documentation](#).



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



2. Click **New** on the action toolbar.

| Field Name | Control Type | Caption | Disabled |
|------------|--------------|---------|--------------------------|
| xColor | Text Editor | color | <input type="checkbox"/> |
| xTest | Text Editor | test | <input type="checkbox"/> |

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

The "User Field Editor" dialog box is shown with the following configuration:

- Table Name: ItemMaster_X
- Field Name: (empty)
- Caption: (empty)
- Control Type: Text Editor
- System Type: Text
- Sql Data Type: Text
- Length: 255
- Options: (empty list)
- Report: (empty)
- Disabled:
- Visible On Mobile:
- Visible On Mobile Device:

Table Name - What table the field will appear on

Field Name - What the name of the UDF will be

Caption - The description for the user field

Control Type - Determines what the UDF will be

The "Control Type" dropdown menu is open, showing the following options:

- Text Editor
- Text Editor
- Checkbox Editor
- File Attachment
- Memo
- Image
- Radio Group
- Checked Combo Box Editor

System Type - Determines the functionality of the UDF

| | |
|---------------|----------|
| System Type | Text |
| Sql Data Type | Text |
| Length | DateTime |
| | Integer |
| Options | |

SQL Data Type - Determines the type of data that SQL will read

| | |
|---------------|------|
| Sql Data Type | Text |
| Length | Text |

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 | |
| | <input type="checkbox"/> Disabled |
| Visible On Mobile | <input type="checkbox"/> Visible On Mobile Device |
| <input type="button" value="OK"/> <input type="button" value="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.

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

| Field Name | Control Type | Caption |
|--------------|--------------|-------------------|
| xColor | Text Editor | color |
| xmodelnumber | Text Editor | Specific model no |
| xTest | Text Editor | test |

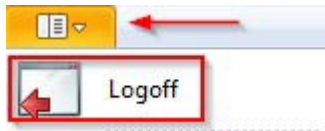
- Click **Save** when you are done with your User Field



- Next, click **Update Database Table**



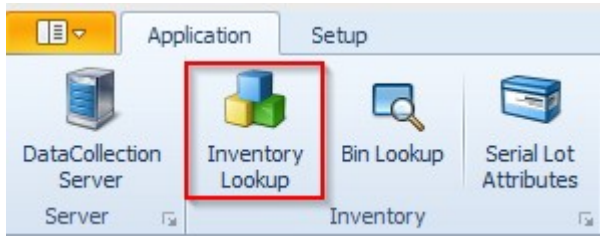
- Click Logoff from the **SalesPad** dropdown for your changes to take effect



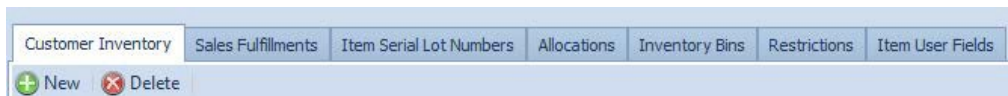
- Log back into DataCollection

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.

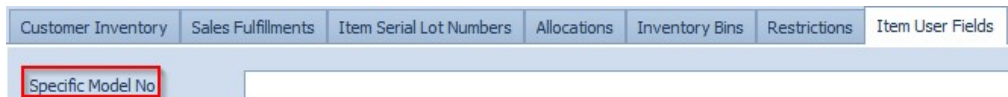
- Click the appropriate tab for your UDF. Since we have added one to the ItemMaster_X table, we will go to the Item Master in Inventory Lookup



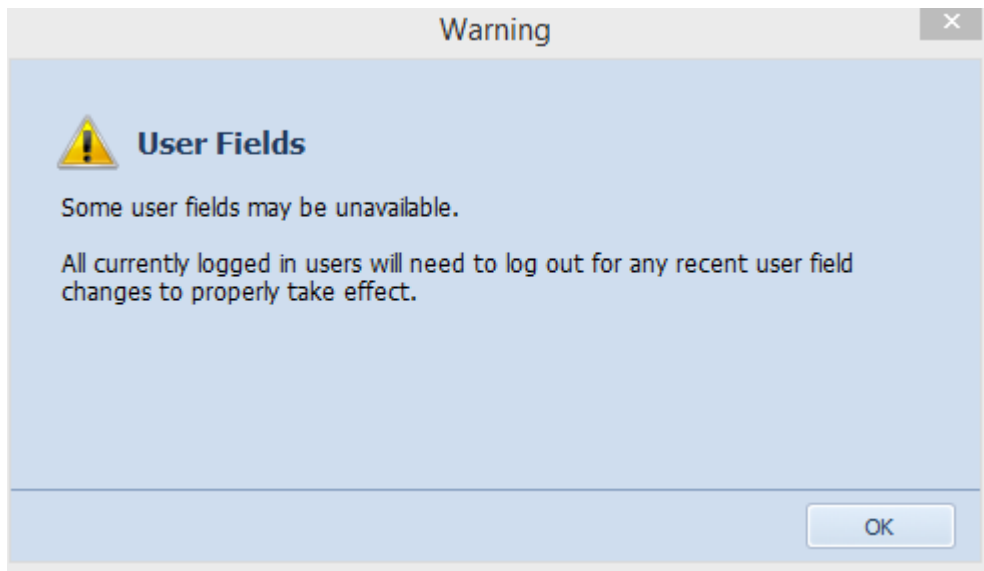
- Go to the section on the card. In this example we will go to the Inventory Lookup specific tabs and then open Item User Fields



- Once clicked, you can view the Item User Fields and see the field that we created.



Note: If you have not logged out and logged back in, you will run into this error.

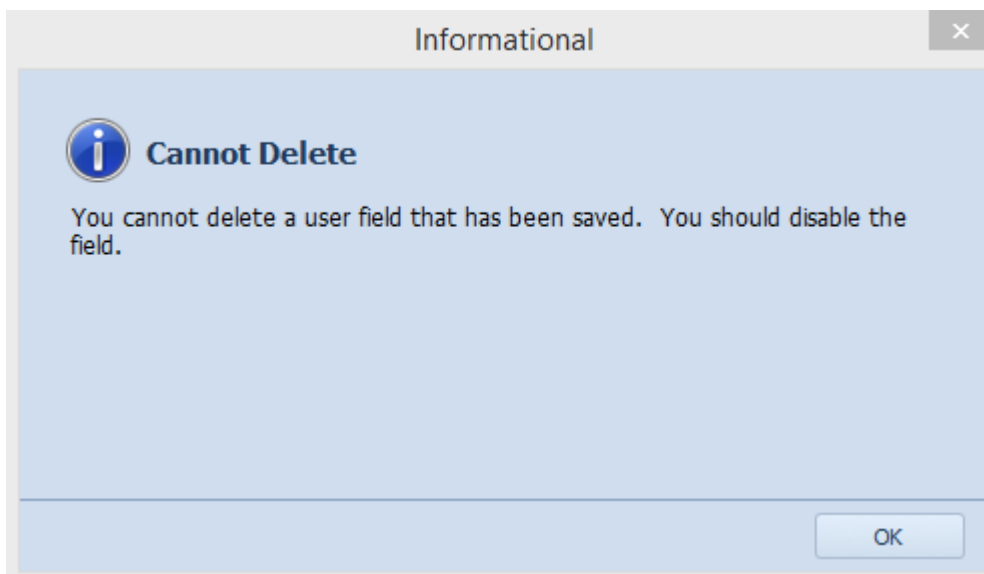


Deleting a User Field

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

| Field Name | Control Type | Caption | Disabled |
|------------|--------------|---------|--------------------------|
| xColor | Text Editor | color | <input type="checkbox"/> |
| xTest | Text Editor | test | <input type="checkbox"/> |

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



Editing a User Field

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

| User Fields | | | |
|--|--------------|---------|--------------------------|
| <input type="button" value="New"/> <input type="button" value="Delete"/> <input type="button" value="Edit"/> | | | |
| Field Name | Control Type | Caption | Disabled |
| xColor | Text Editor | color | <input type="checkbox"/> |
| xTest | Text Editor | test | <input type="checkbox"/> |

This will bring you to the User Field Editor menu.

User Field Editor ✕

| | |
|---------------|---|
| Table Name | <input type="text" value="ItemMaster_X"/> |
| Field Name | <input type="text" value="xTest"/> |
| Caption | <input type="text" value="Test"/> |
| Control Type | <input type="text" value="Text Editor"/> ▼ |
| System Type | <input type="text" value="Text"/> ▼ |
| Sql Data Type | <input type="text" value="Text"/> ▼ |
| Length | <input type="text" value="255"/> |
| Options | <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div> |
| Report | <div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div> |

Disabled

Visible On Mobile Visible On Mobile Device

Here there are a variety of options to change the User Field. You can use the options mentioned in [Creating a New UserField](#) 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 |
|--------------------------|
| <input type="checkbox"/> |
| <input type="checkbox"/> |

1. To disable the field, first select the User Field you would like to disable and hit **Edit**.

User Fields

+ New - Delete **Edit**

Field Name

xModelNumber

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

Sql Data Type: Text

Length: 255

Options

Report

Disabled Visible On Mobile Device

Visible On Mobile Visible On Mobile Device

OK Cancel

3. Click **OK**

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 Device

OK
Cancel

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

| | |
|----------|-------------------------------------|
| Disabled | |
| | <input checked="" type="checkbox"/> |