



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

## User Defined Fields Editor

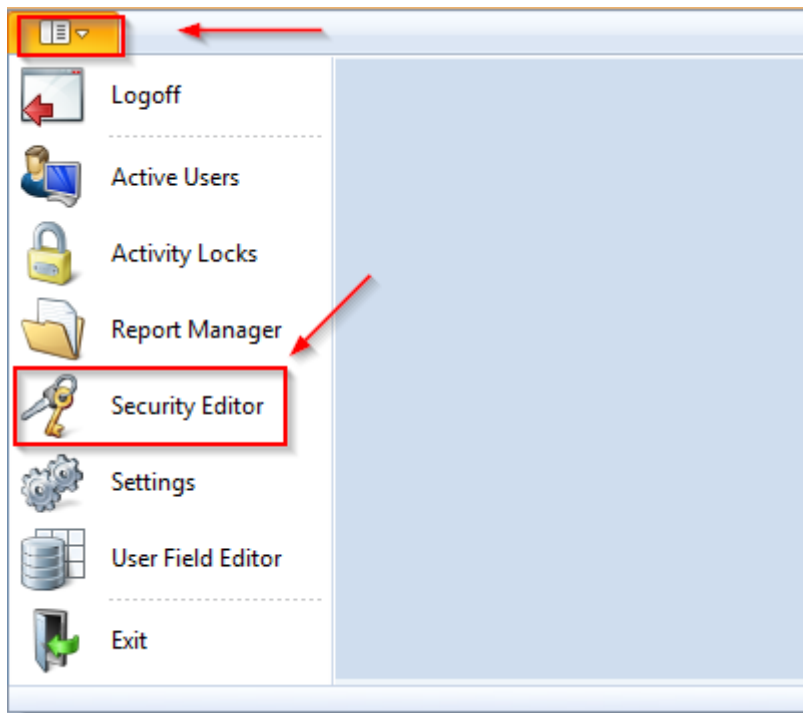
Megan De Freitas - 2024-11-22 - Setup

### Overview

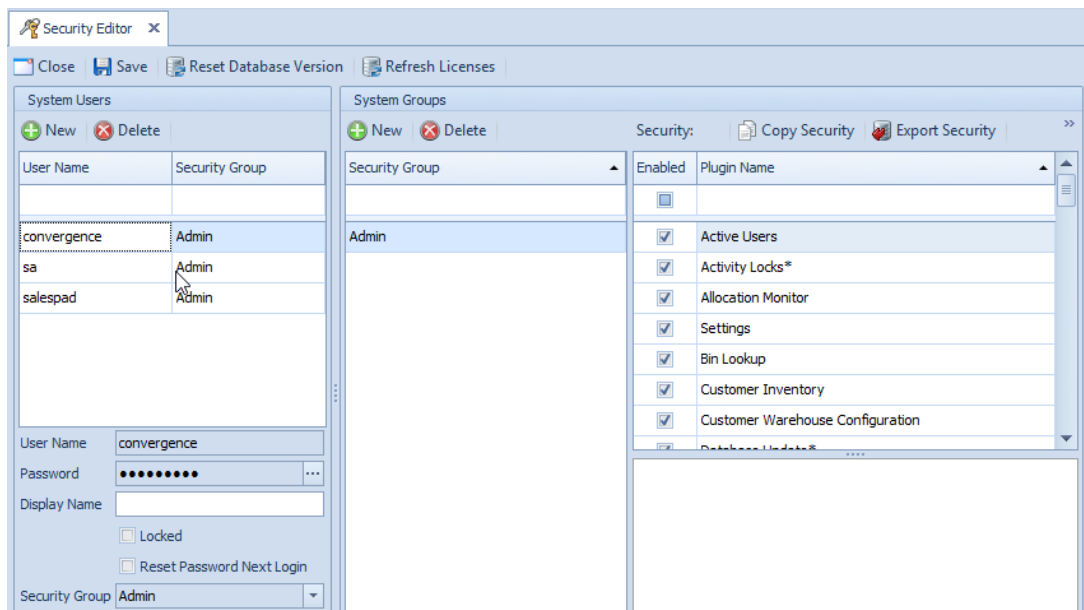
DataCollection allows users to create User Defined Fields similar to how SalesPad GP does. This documentation covers creation and modification of User Defined Fields in DataCollection.

### Security

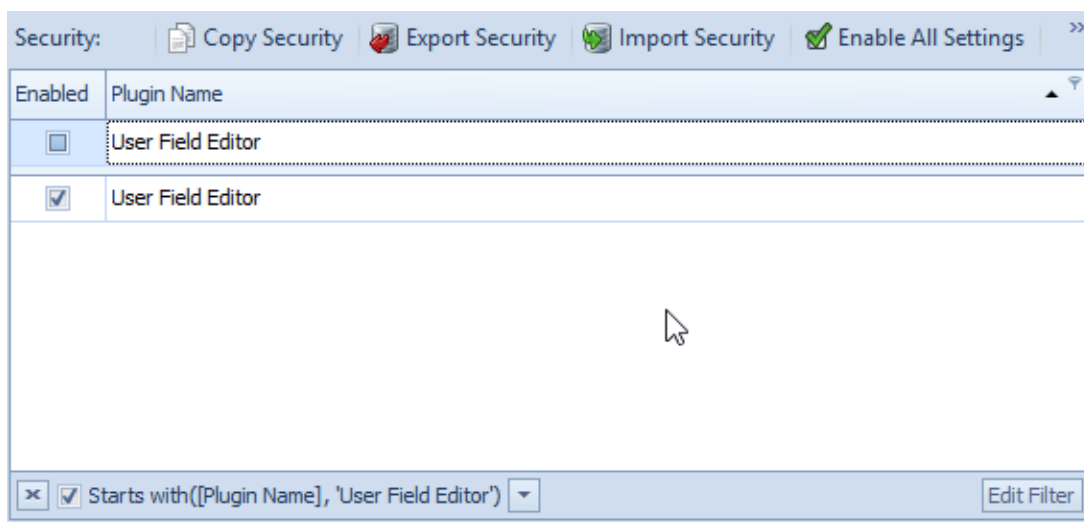
To enable the User Field Editor, first click the **SalesPad** dropdown and click Security Editor.



This will bring you to the Security Editor menu.



Search for and enable *User Field Editor*.



## Usage

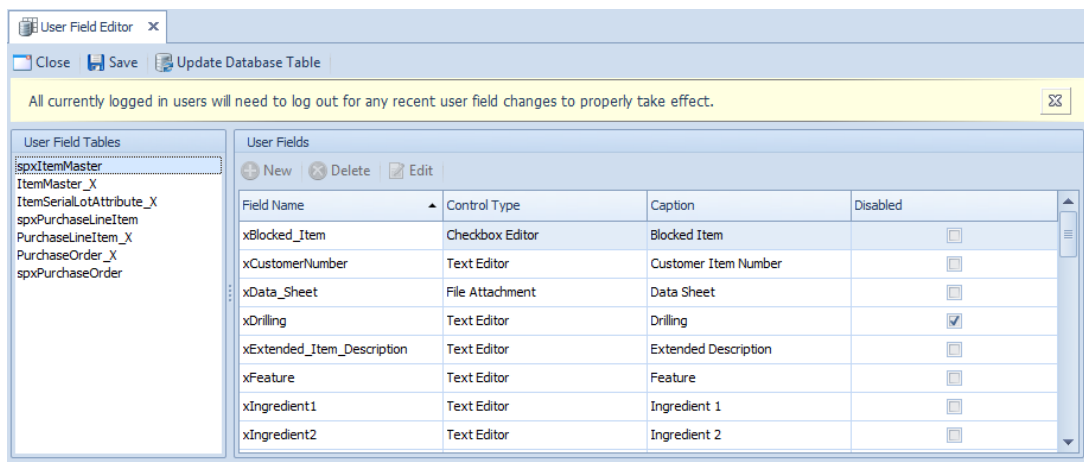
### Creating a New User Field

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

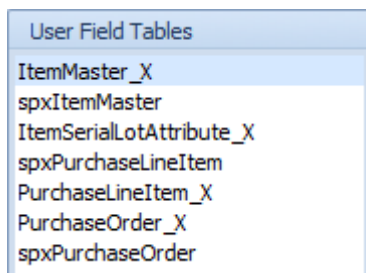


The UDF editor will open and you will be able to see User Field Tables in DataCollection and those created in SalesPad. UDFs from SalesPad are donated as .spx files.

**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.

User Fields			
<span>+ New</span> <span>✖ Delete</span> <span>✎ Edit</span>			
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.

User Field Editor

Table Name

ItemMaster\_X

Field Name

Caption

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

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

Control Type

Text Editor

System Type

Text Editor

Sql Data Type

Checkbox Editor

Length

File Attachment

Options

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

- 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	
<input type="checkbox"/> Visible On Mobile Device	
<div>OK</div> <div>Cancel</div>	

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.

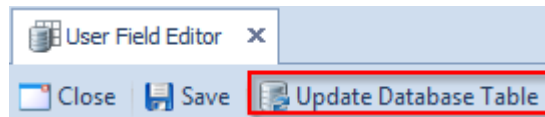
5. Your User Defined Field will now appear in the User Fields menu.

User Fields		
New Delete Edit		
Field Name	Control Type	Caption
xColor	Text Editor	color
xmodelnumber	Text Editor	Specific model no
xTest	Text Editor	test

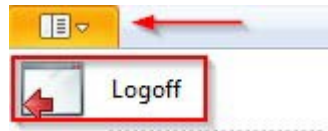
6. Click **Save** when you are done with your User Field



7. Next, click **Update Database Table**



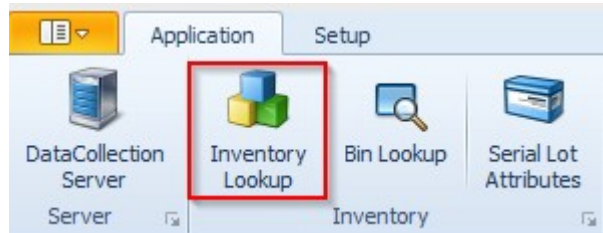
8. Click Logoff from the **SalesPad** dropdown for your changes to take effect



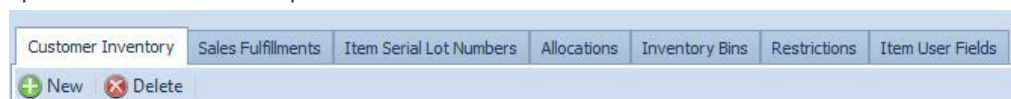
9. Log back into DataCollection

**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.

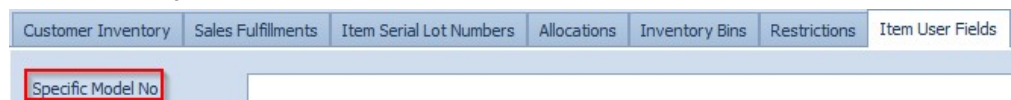
10. Click the appropriate tab for your UDF. Since we have added one to the ItemMaster\_X table, we will go to the Item Master in Inventory Lookup



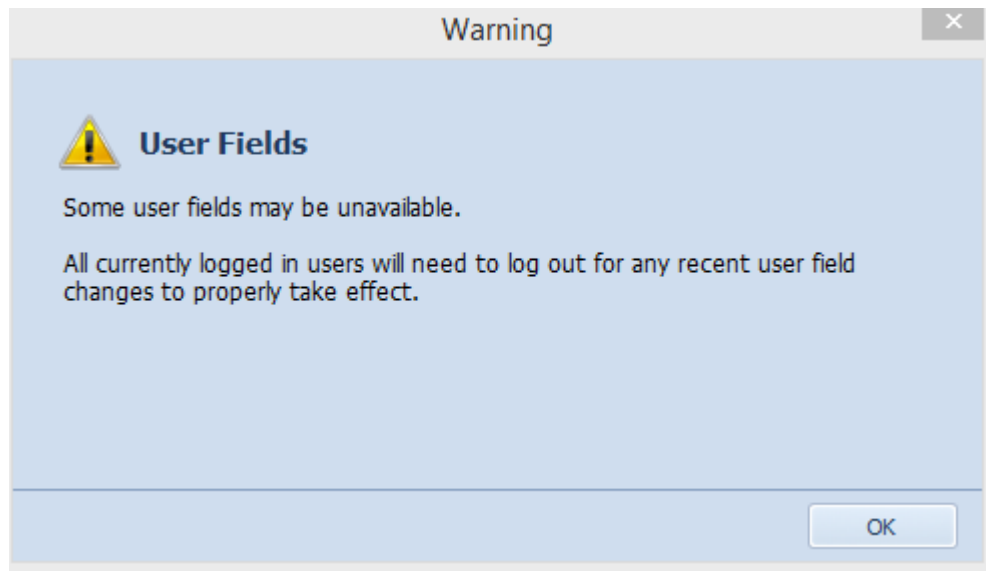
11. Go to the section on the card. In this example we will go to the Inventory Lookup specific tabs and then open Item User Fields



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

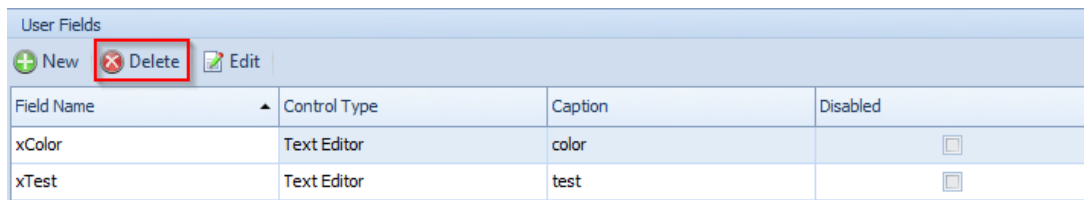


**Note:** If you have not logged out and logged back in, you will run into this error.

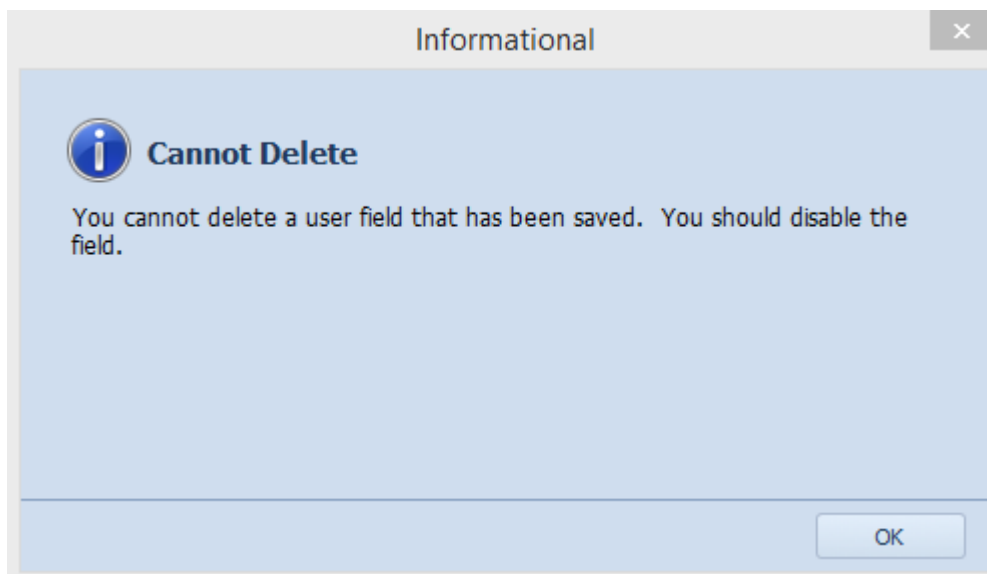


#### Deleting a User Field

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



**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			
<span>➕ New</span> <span>✖ Delete</span> <span>✎ Edit</span>			
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

ItemMaster\_X

Field Name

xTest

Caption

Test

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

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.

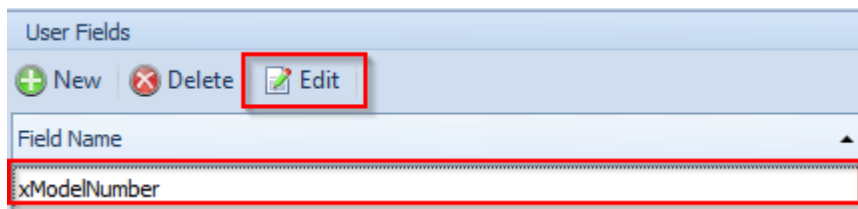
#### Disabled Column

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"/>

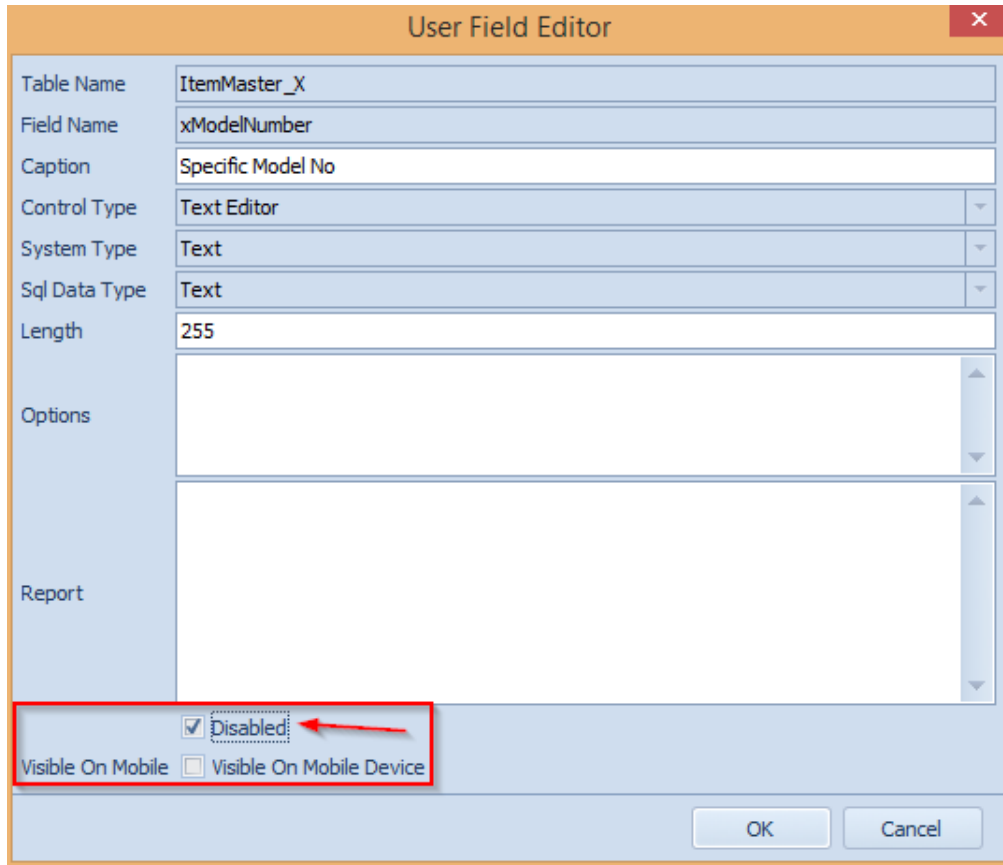
1. To disable the field, first select the User Field you would like to disable and hit **Edit**.





The 'User Fields' dialog box has a title bar 'User Fields'. Below the title bar are three buttons: '+ New' (green plus icon), 'Delete' (red X icon), and 'Edit' (pencil icon). The 'Edit' button is highlighted with a red rectangle. Below the buttons is a 'Field Name' label and a text input field containing 'xModelNumber', which is also highlighted with a red rectangle.

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



The 'User Field Editor' dialog box has a title bar 'User Field Editor' with a close button (X). It contains several fields: 'Table Name' (ItemMaster\_X), 'Field Name' (xModelNumber), 'Caption' (Specific Model No), 'Control Type' (Text Editor), 'System Type' (Text), 'Sql Data Type' (Text), and 'Length' (255). Below these are two large empty text areas labeled 'Options' and 'Report'. At the bottom, there are two checkboxes: 'Disabled' (checked) and 'Visible On Mobile Device' (unchecked). The 'Disabled' checkbox is highlighted with a red rectangle and a red arrow points to it. Below the checkboxes are 'OK' and 'Cancel' buttons.

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

☐ Visible On Mobile Device

OK

Cancel

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

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