User Defined Fields Editor

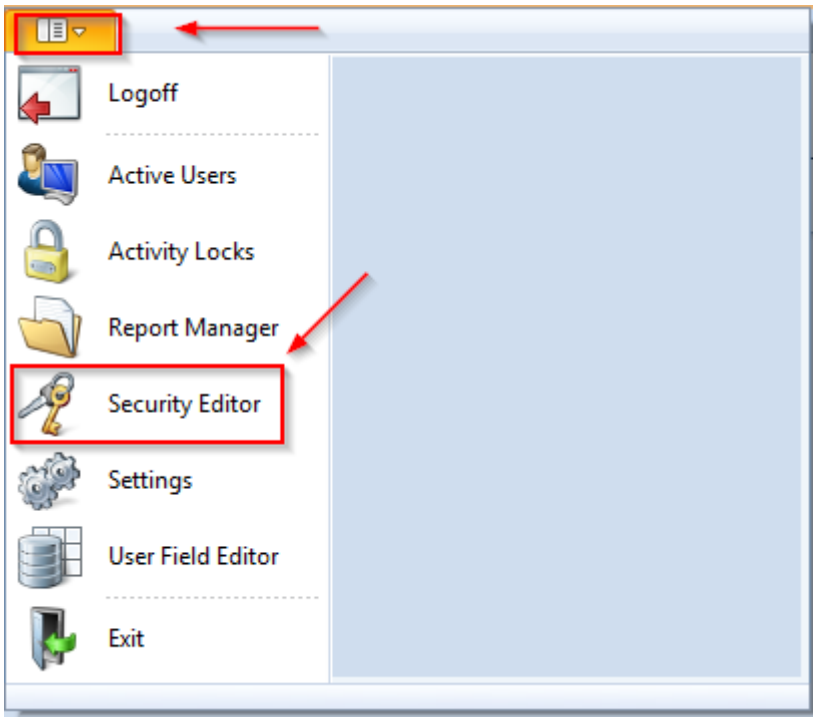
Cavallo Support - 2024-11-22 - Setup

Overview

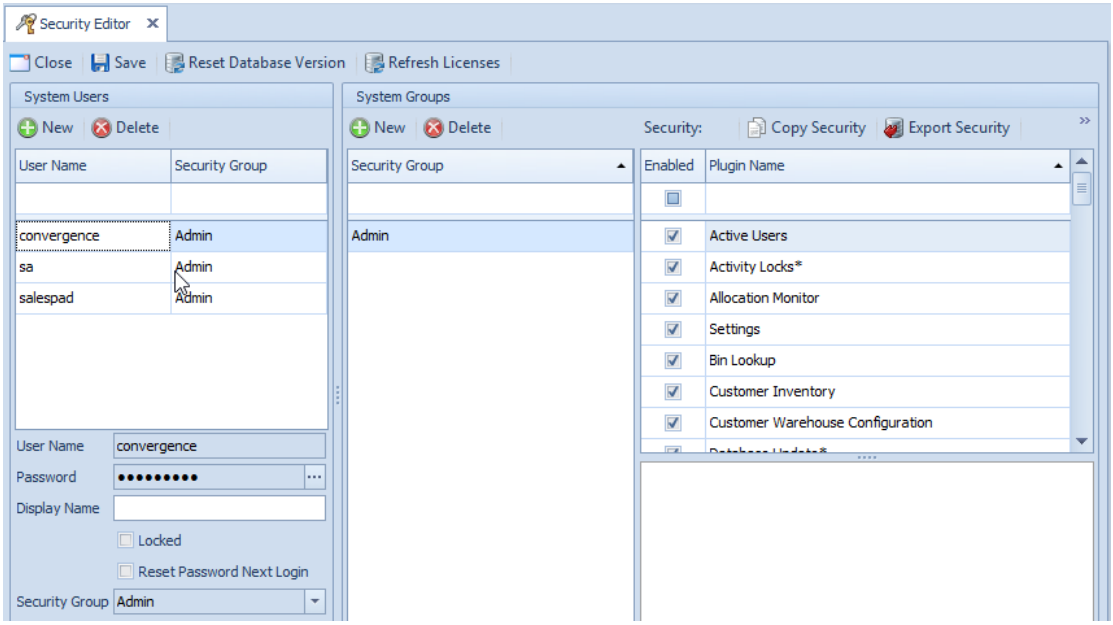
DataCollection allows users to create User Defined Fields similar to how SalesPad GP does. This documentation covers creation and modification of User Defined Fields in DataCollection.

Security

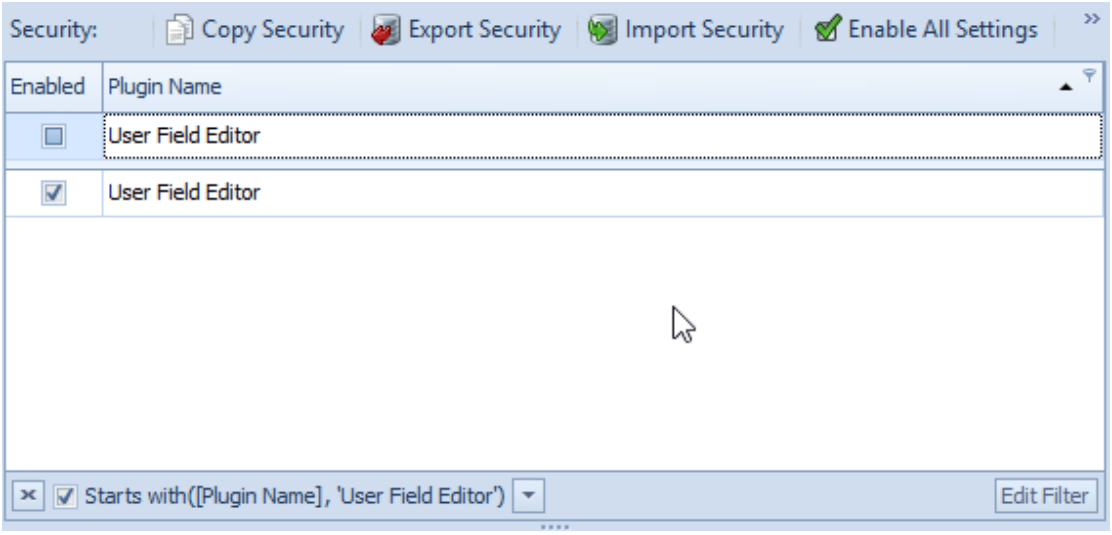
To enable the User Field Editor, first click the **SalesPad** dropdown and click Security Editor.



This will bring you to the Security Editor menu.



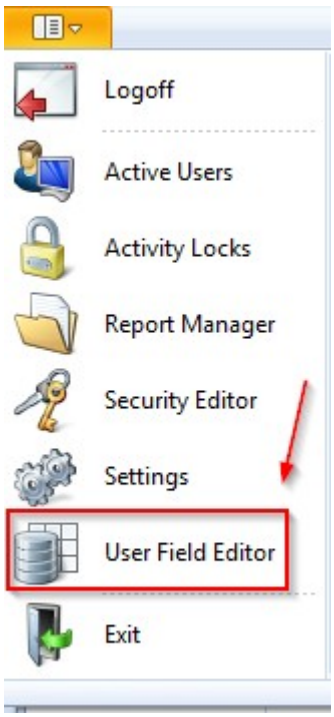
Search for and enable *User Field Editor.*



Usage

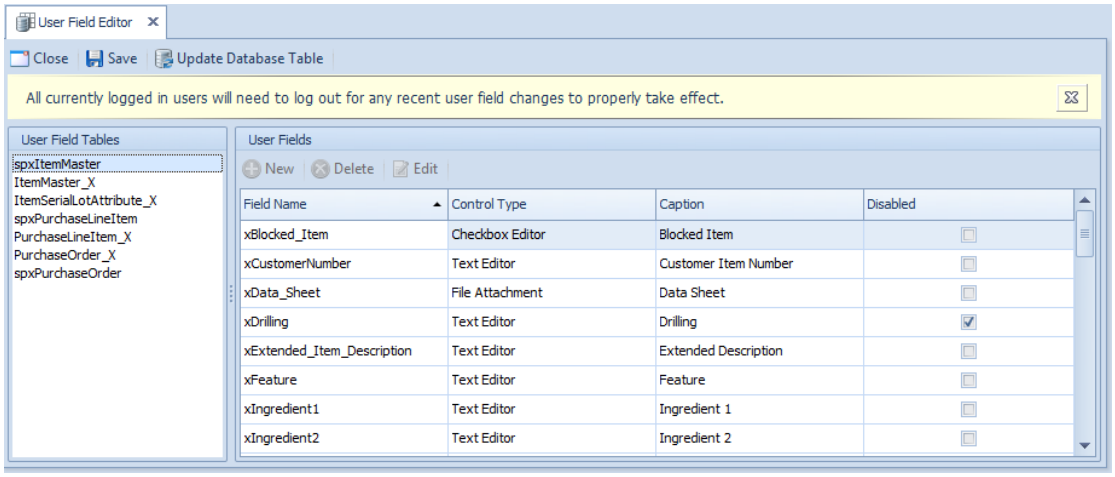
Creating a New User Field

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

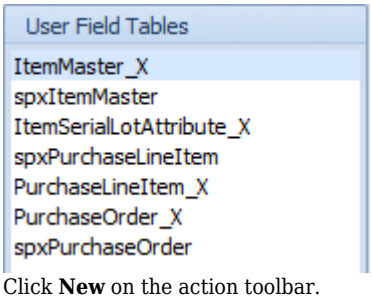


The UDF editor will open and you will be able to see User Field Tables in DataCollection and those created in SalesPad. UDFs from SalesPad are donated as .spx files.

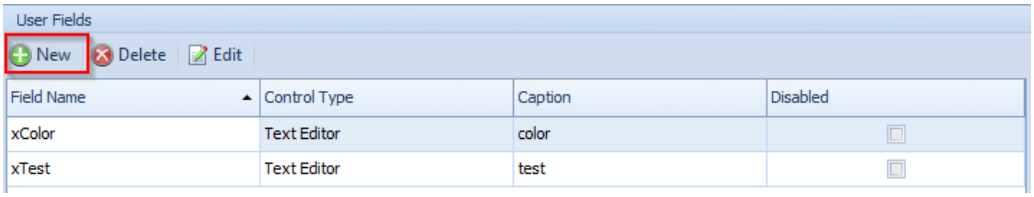
Note: For more information on UDFs in SalesPad, please see our documentation.



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.



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

different User Fields.

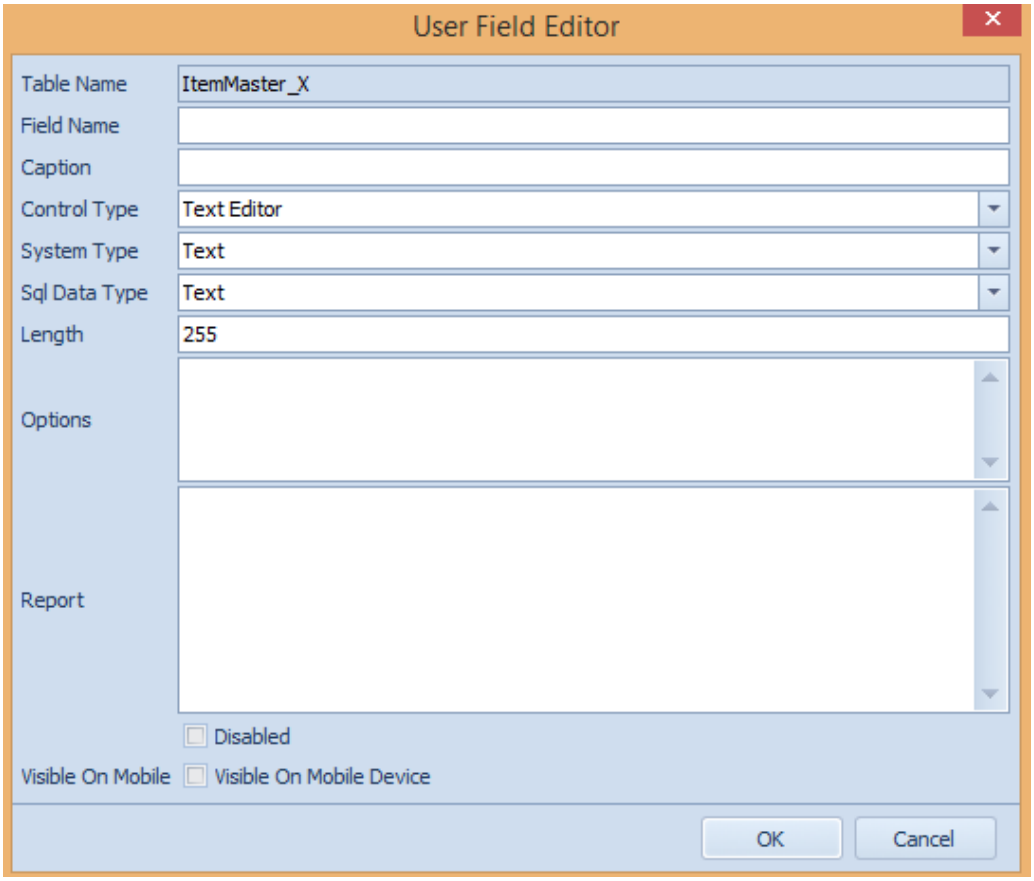
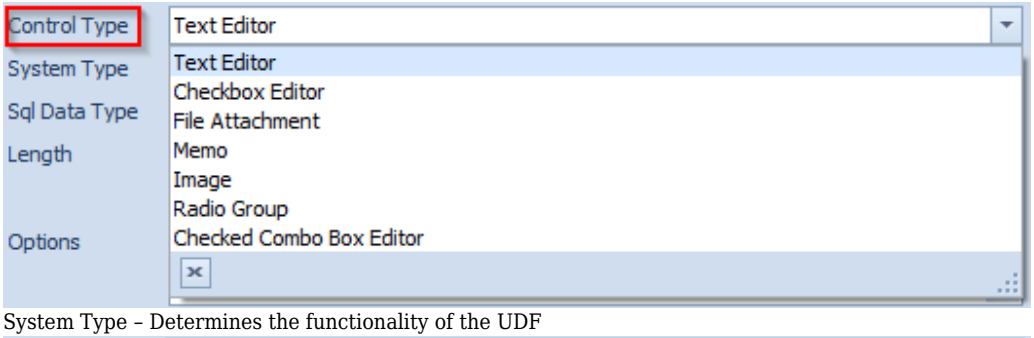
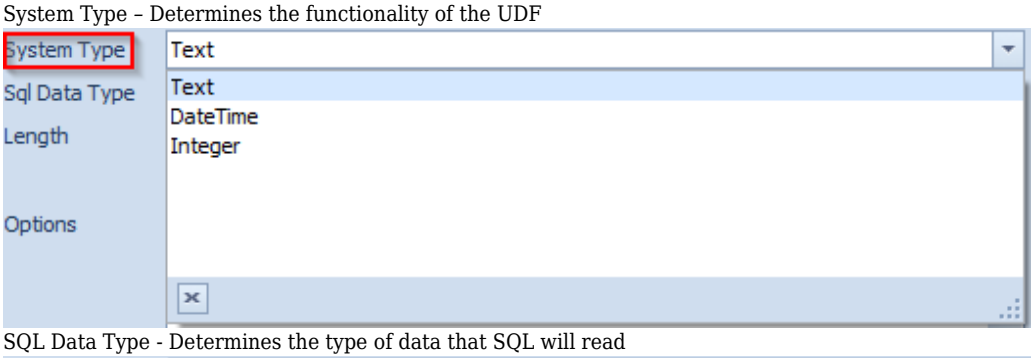


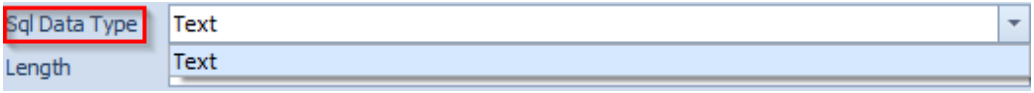
Table Name – What table the field will appear on
Field Name – What the name of the UDF will be
Caption – The description for the user field
Control Type – Determines what the UDF will be



System Type – Determines the functionality of the UDF



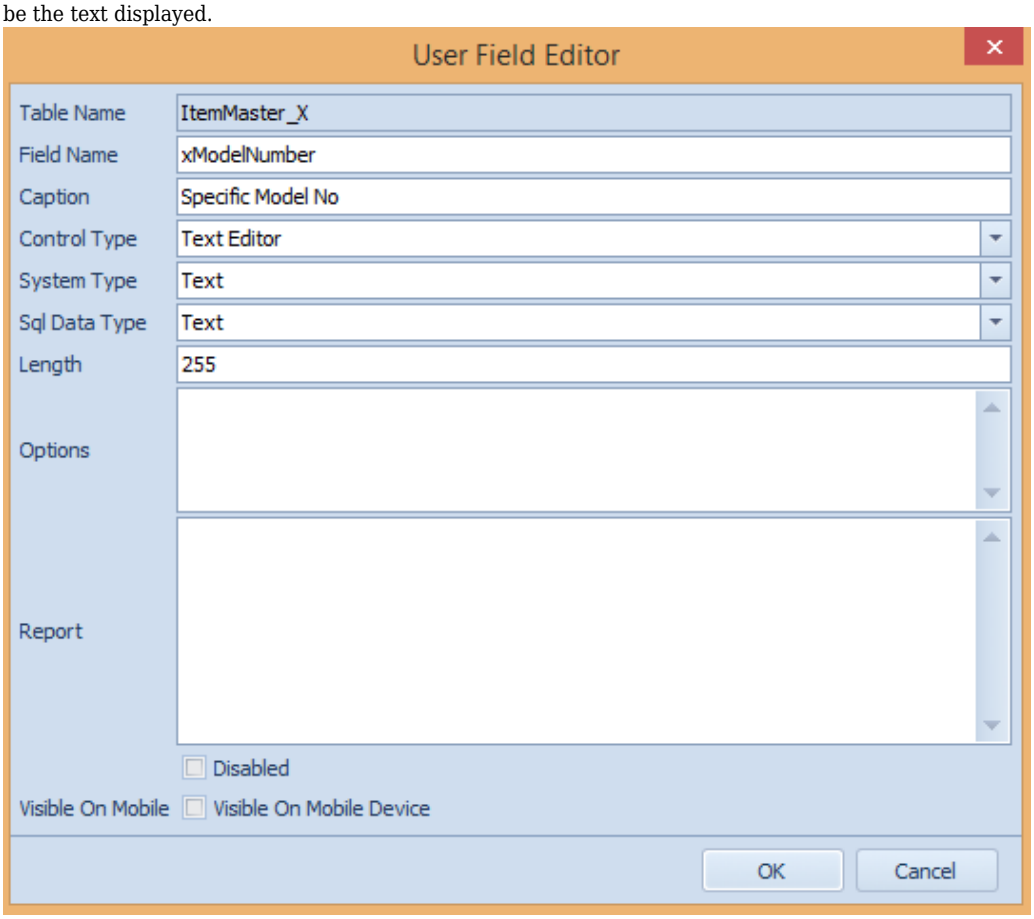
SQL Data Type - Determines the type of data that SQL will read



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

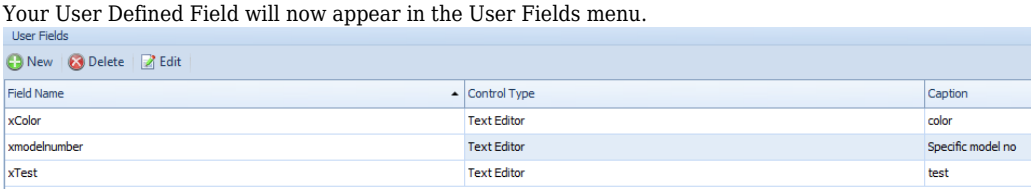
4. Enter the information of how you want your User Field setup. For this example, we will add a User Field to the ItemMaster_X table. We will be adding a Model Number to the Item Master. The Caption field will be the text displayed.



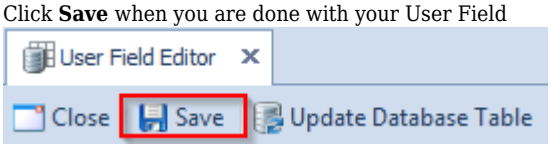
As you can see, we have created this as a text field by using the Control Type, System Type, and SQL Data Types as text.

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.



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



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



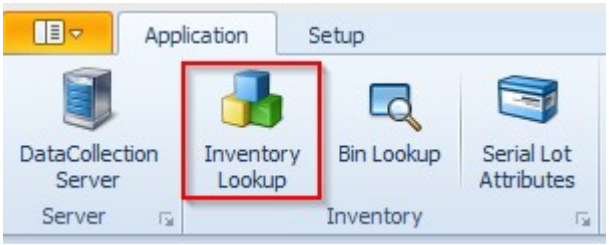
8. Click Logoff from the **SalesPad** dropdown for your changes to take effect



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.

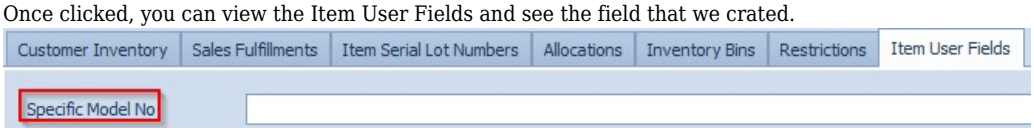
10. Click the appropriate tab for your UDF. Since we have added one to the ItemMaster_X table, we will go to the Item Master in Inventory Lookup



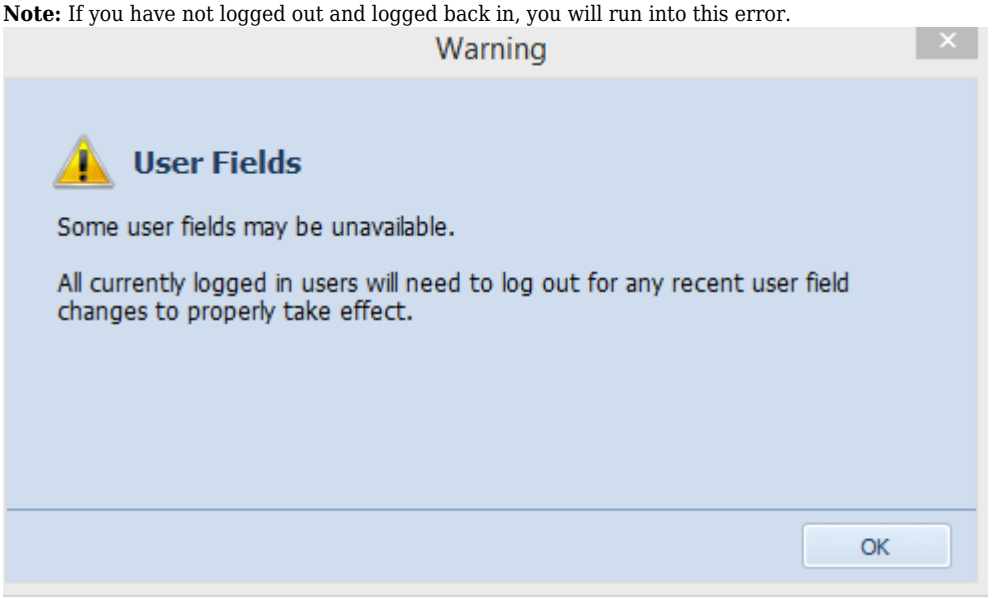
11. Go to the section on the card. In this example we will go to the Inventory Lookup specific tabs and then open Item User Fields



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

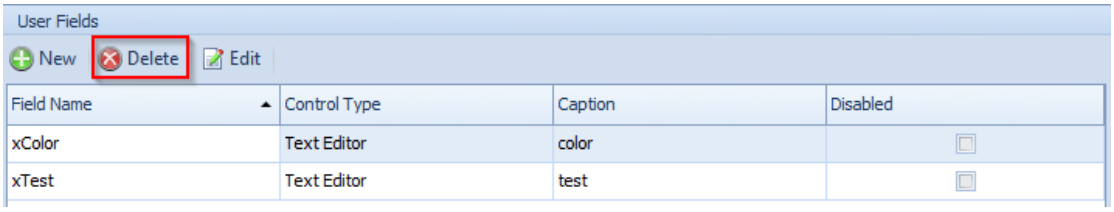


Note: If you have not logged out and logged back in, you will run into this error.

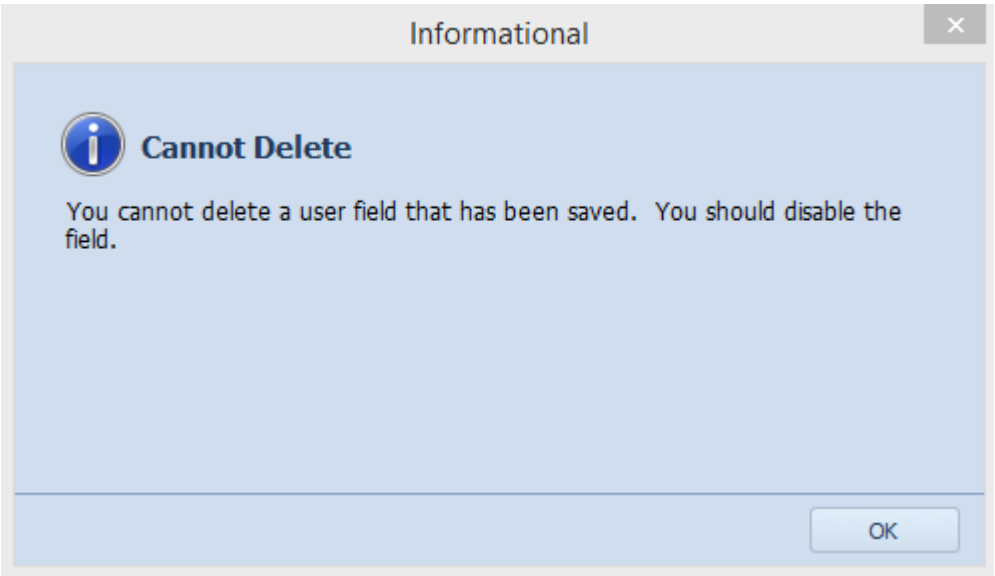


Deleting a User Field

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

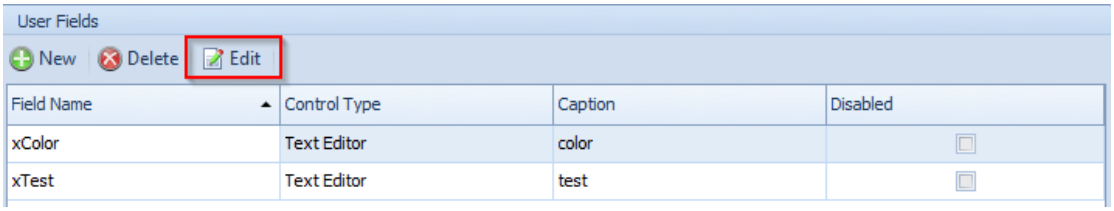


Note: You cannot delete a User Field that has been saved. You will receive this error message.

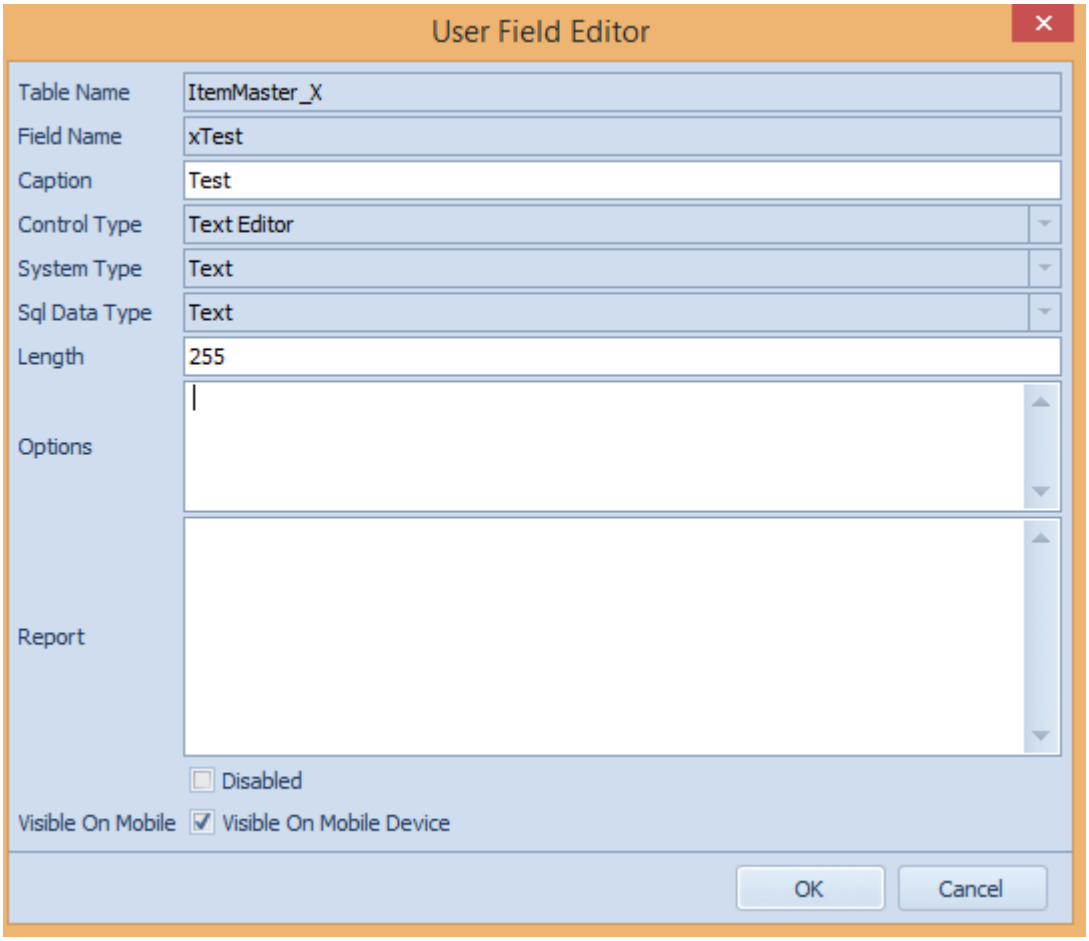


Editing a User Field

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



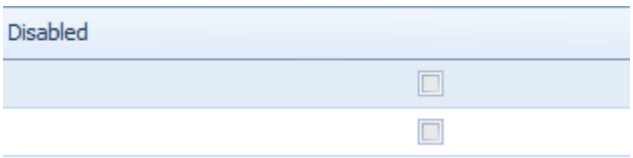
This will bring you to the User Field Editor menu.



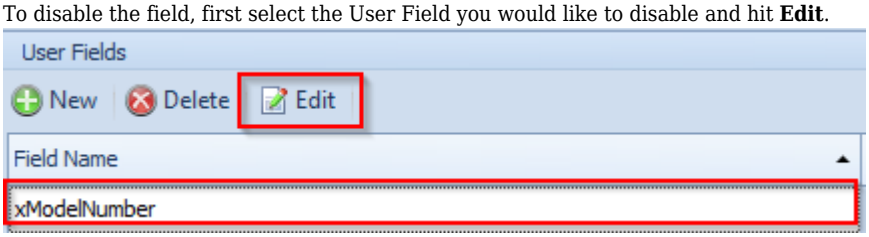
Here there are a variety of options to change the User Field. You can use the options mentioned in Creating a New UserField section of this documentation to alter UDFs.

Disabled Column

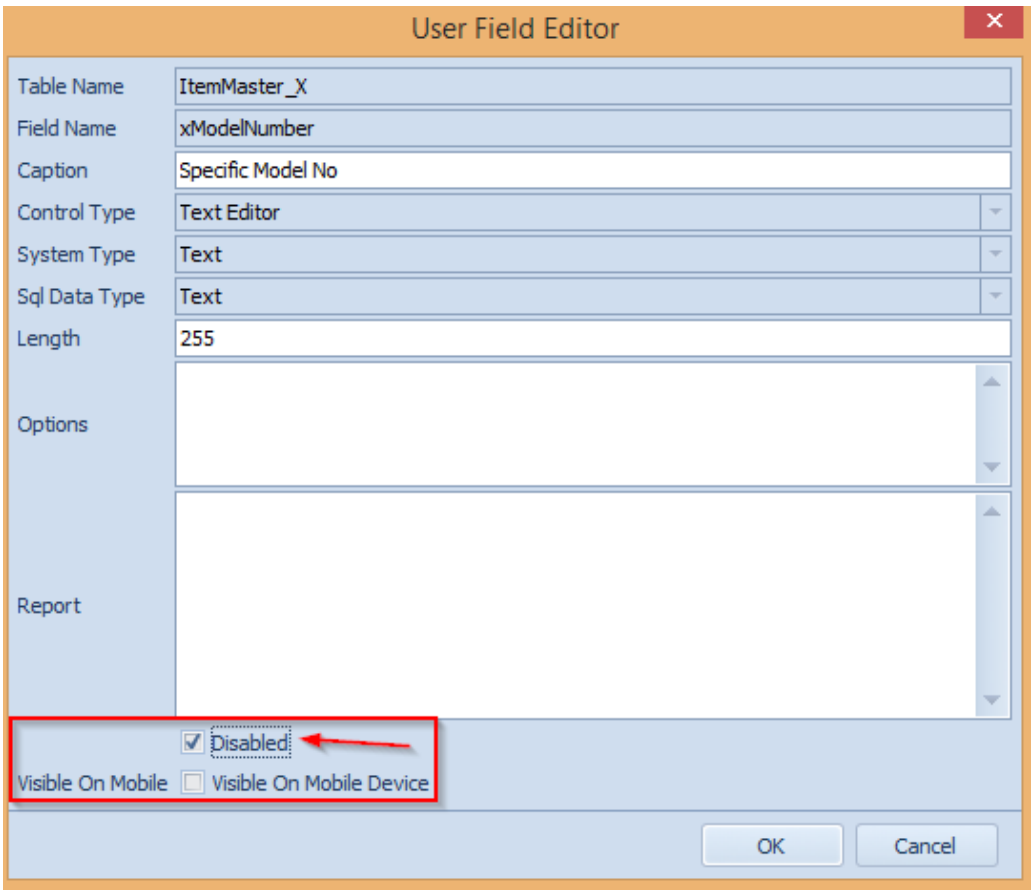
DataCollection UDF's have the power to disable User Fields. However, you cannot do this from just the menu. The check boxes in the screenshot below cannot be clicked.



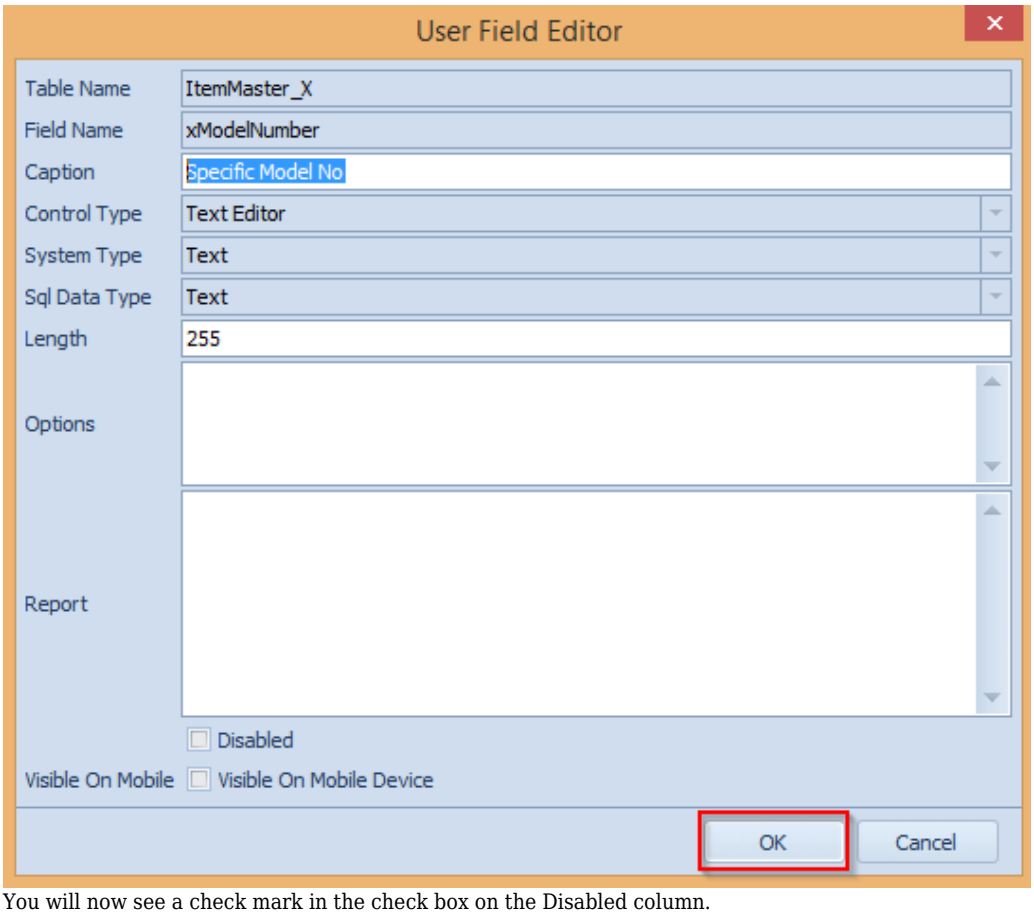
1. To disable the field, first select the User Field you would like to disable and hit **Edit**.



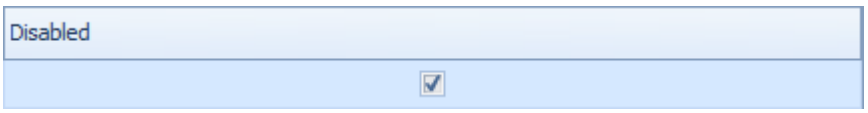
2. Click on **Disabled** when in the User Field Editor



3. Click **OK**



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


Disabled