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User Defined Fields for SalesPad+

Cavallo Support - 2025-06-11 - [Miscellaneous](#)

Overview

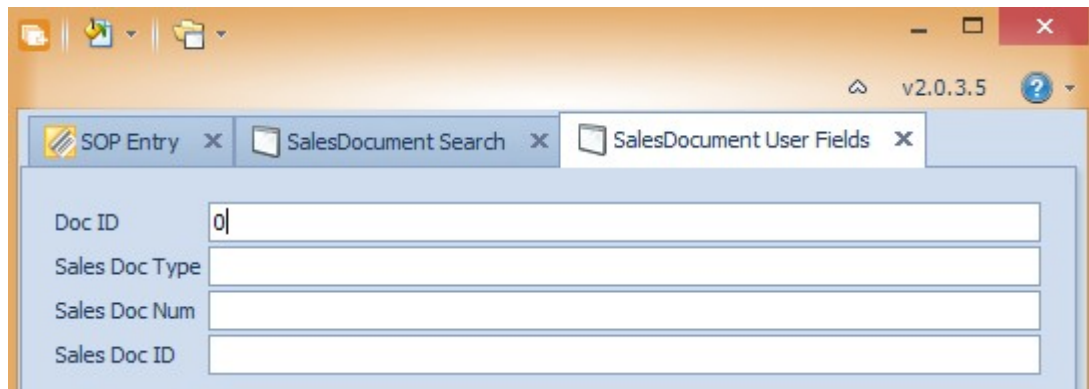
Dynamics GP has a limited number of user defined fields (UDFs) for certain types of objects (customers, items, etc) and these userfields are not very limited in functionality (un-editable data types, for example). Additions User Defined Fields enables the ability to read in an unlimited number of userfields for each type of object from SalesPad GP and have these userfields be displayed in a companion form tab. Because the userfields are read from SalesPad GP, it is also very simple to add and modify userfields without needing to understand a very complicated back-end system. The Additions UDF tab also has a customizable layout and exists on every tab listed in the Searching section of this document. Additions allows UDFs to be created in SalesPad and then edited and viewed in Dynamics GP.

Note: The limit for user defined fields is 100.

Default UDFs

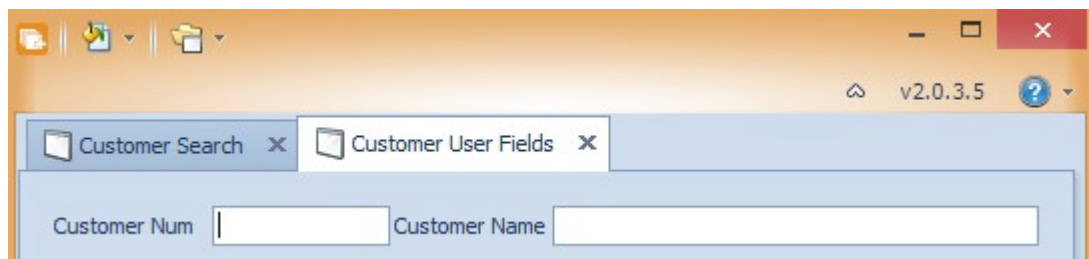
Sales Transaction Entry

DocID, Sales Doc Type, Sales Doc Num, Sales Doc ID



Customer Card

Customer Num, Customer Name



Vendor Cards

Vendor ID, Vendor Name

Vendor ID

Vendor Name

Purchase Order Entry

PO Number, PO Status, PO Type

PO Number

PO Status

PO Type

Item Master

Item Number, Item Description

Item Number

Item Description

Additional UDFs are created in the SalesPad GP User Defined Fields editor.

System Requirements

- Dynamics GP (10/2010/2013/2013 R2) *2013 R2 Requires Latest Version
- SalesPad GP (Refer to [System and Hardware Requirements](#))
- Refer to [SalesPad Installation and Connection Guide](#) for SalesPad installation

Security

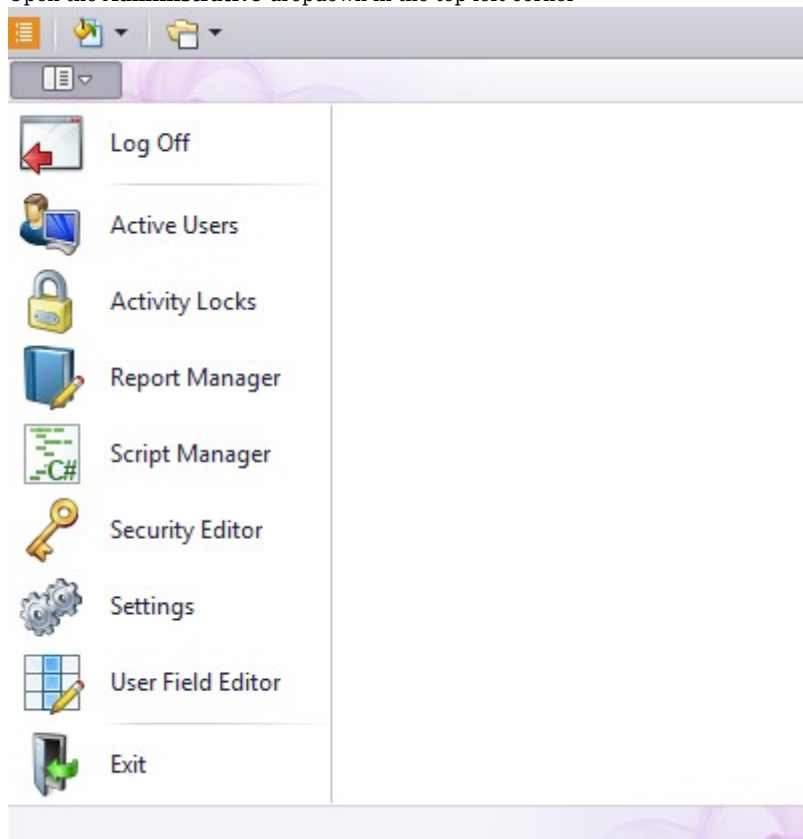
The security settings in SalesPad must be turned on to fully enable all of the features for Userfields.

1. Open SalesPad

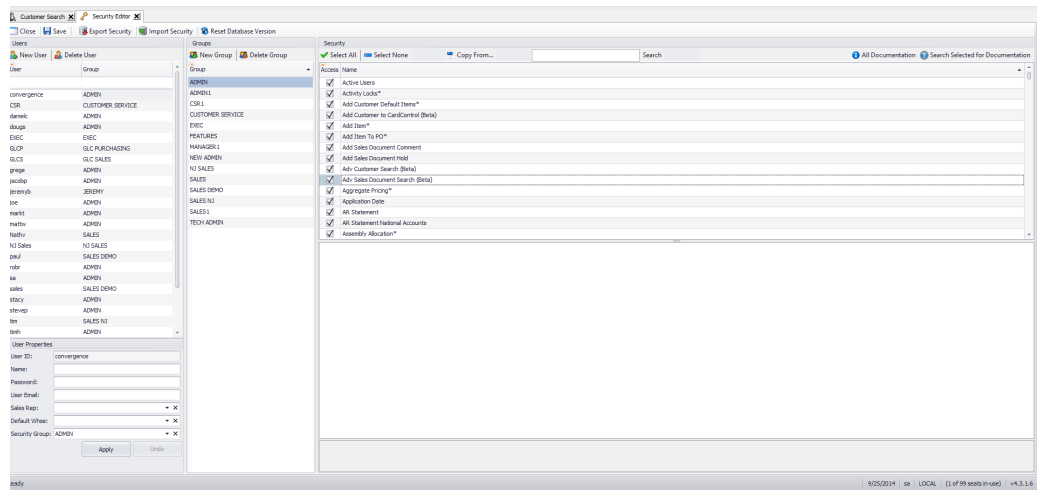


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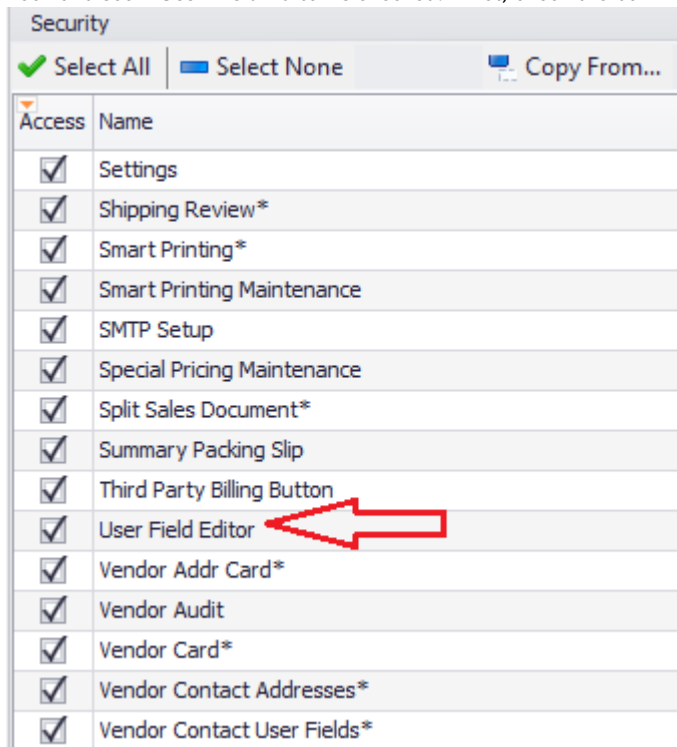
2. Open the **Administrative** dropdown in the top left corner



3. Open the "Security Editor." The screen should like the following:



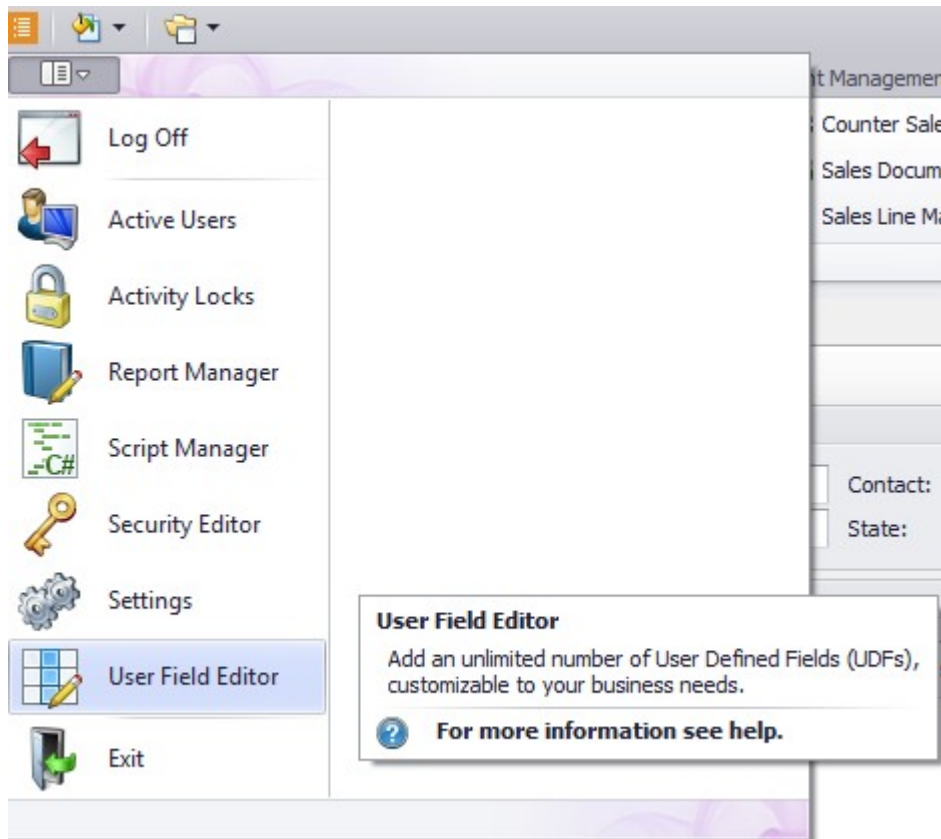
- Look and see if **User Field Editor** is checked. If not, check the box



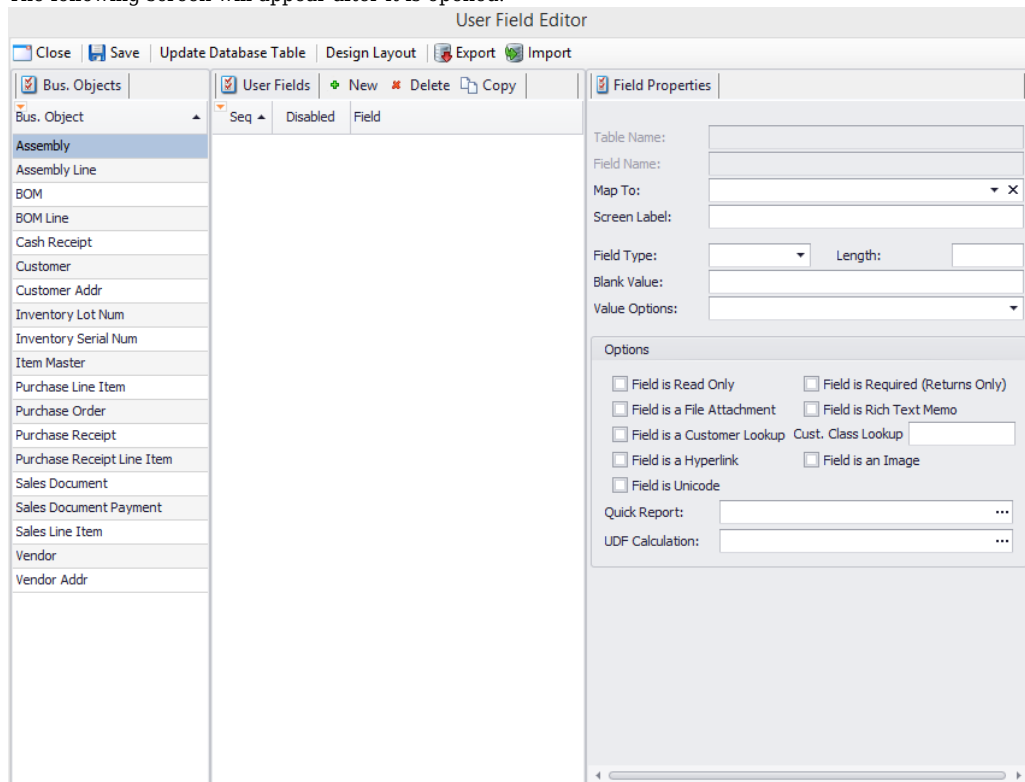
This will enable the User Field editor. For more information refer to [Security Editor Managing Users and Groups](#)

Creating and Editing Userfields

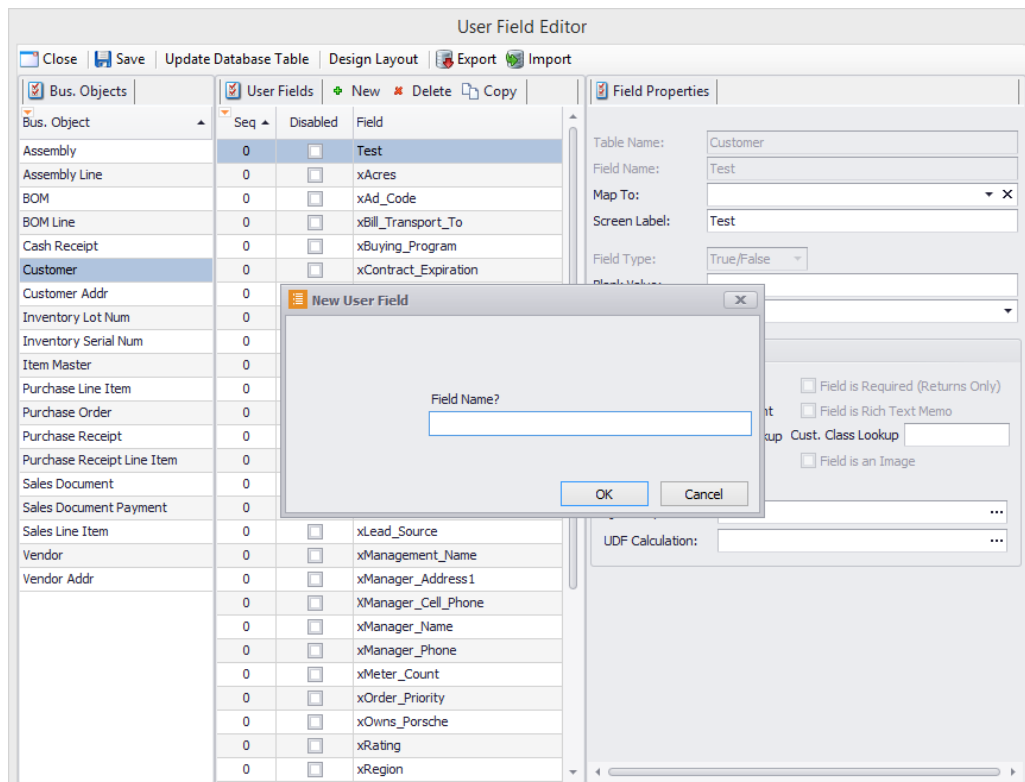
- Open the **Administrative** dropdown and select User Field Editor in SalesPad



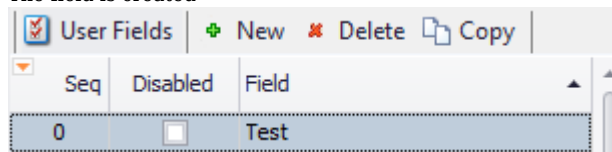
Note: Once it is opened, exiting the User Field Editor will log the user out of SalesPad completely. The following screen will appear after it is opened.



2. To create a new user field select an available Business Object (labeled Bus.Object) and then select **New**



3. Enter a Field Name and Click **OK**
4. The field is created



Field Properties

Using the field properties editor, you can editor the different components to your field. See screen shot on the following page:

Field Properties

Table Name: Customer

Field Name: Test

Map To: [Dropdown] X

Screen Label: [Empty]

Field Type: [Dropdown]

Blank Value: [Empty]

Value Options: [Dropdown]

Options

☐ Field is Read Only ☐ Field is Required (Returns Only)

☐ Field is a File Attachment ☐ Field is Rich Text Memo

☐ Field is a Customer Lookup Cust. Class Lookup [Empty]

☐ Field is a Hyperlink ☐ Field is an Image

☐ Field is Unicode

Quick Report: [Empty] ...

UDF Calculation: [Empty] ...

Field Name - The name of the field you created

Map to - Links to either 1 UserDef or 2 Userdef

Screen label - Display name of the field

Field Type - This is the type of data that will be stored in the Database

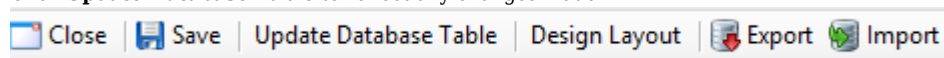
Blank Value - Values that will populate

Value Options - A text dropdown menu for which the user creates values to be selected from within the User Defined Field

Options - Different options for limiting or enhancing the user experience

Quick Report - An XML entry for a quick report relating to the User Defined Field

1. Enter the criteria that best fits the field you want to create
2. Click **Save**
3. Click **Update Database Table** to reflect any changes made



Note: Once a field has been saved it cannot be deleted, only disabled.

Copying fields

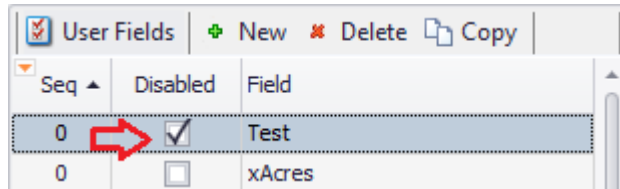
Copies can be made of already designed userfields.

Deleting and Disabling Fields

1. To delete a field, highlight the field and select **Delete**



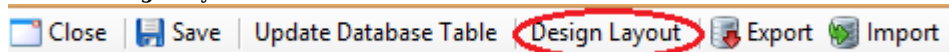
2. Fields that have been saved cannot be deleted. To disable these fields check the box under Disabled to the left of the field.



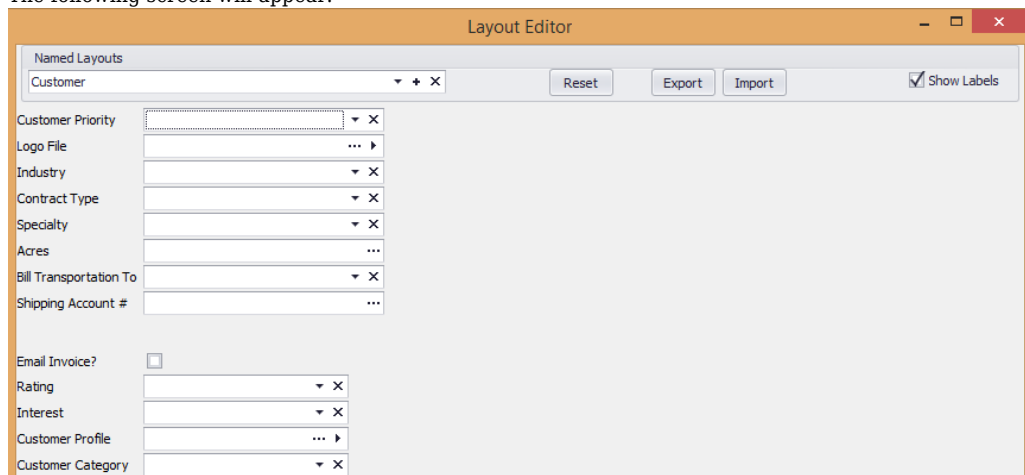
Designing Userfields

One of the features of the Userfields Editor is that you are able to design the layout of the userfields.

1. Click on **Design Layout**



The following screen will appear:



There are Named Layouts for a variety of different business objects. The following screen shots show different layouts:



Named Layouts

Customer

Customer Priority

▼ X

Logo File

... ►

Industry

▼ X

Contract Type

▼ X

Specialty

▼ X

Acres

...

Bill Transportation To

▼ X

Shipping Account #

...

Email Invoice?

☐

Rating

▼ X

Interest

▼ X

Customer Profile

... ►

Customer Category

▼ X

Named Layouts

Item Master

UPC

...

Item Category 2

...

Separate Delivery Required?

☐

Extended Description

...

Feature

▼ X

Item category

...

Lead Time

...

Data Sheet

... ►

Customer Item Number

...

- Right click on your mouse to bring up more options for design the userfields

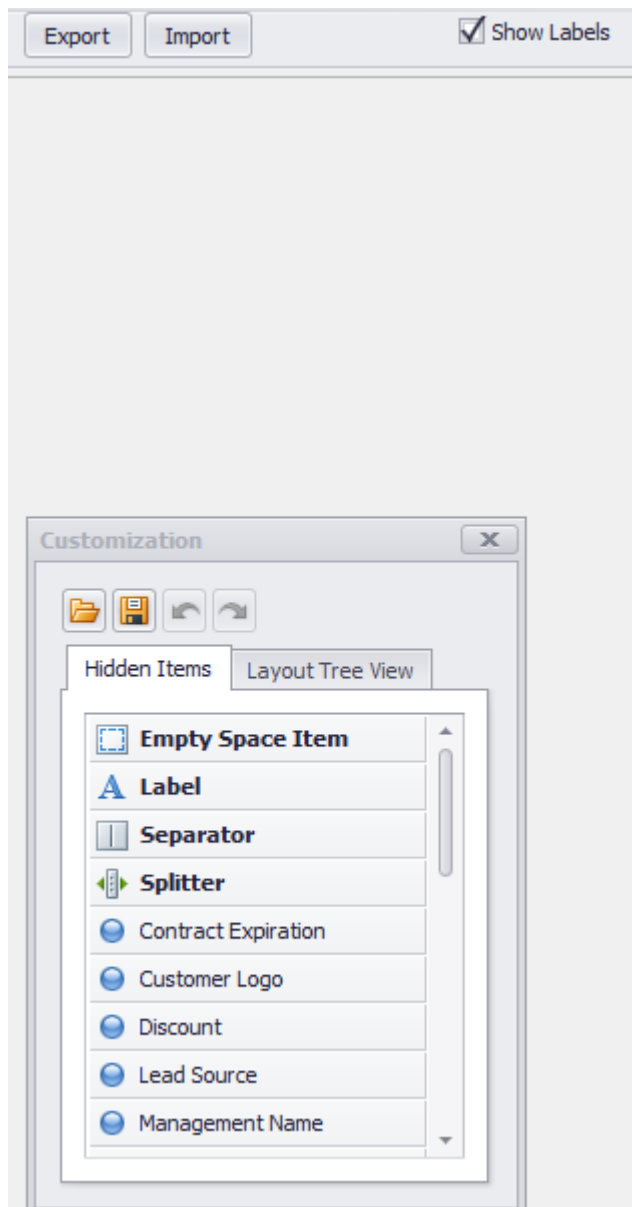
Export

Import

☒ Show Labels

Customize Layout

The following screen will appear:

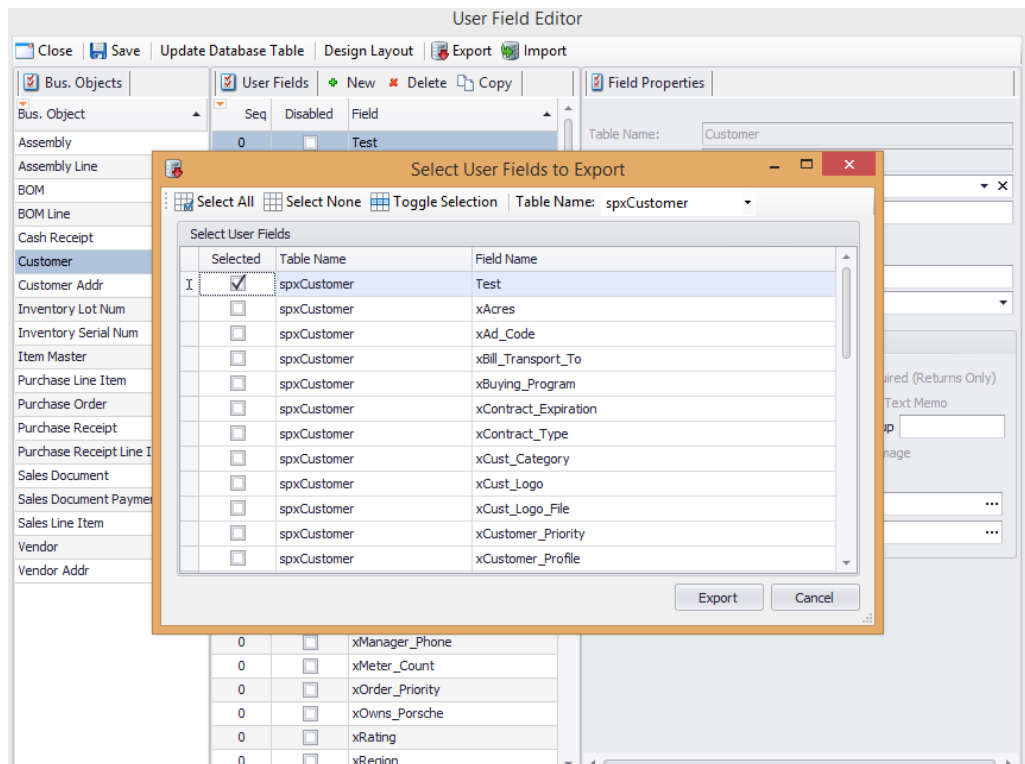


Custom Userfields

Contact your SalesPad Account Manager in order to create custom userfields or scripts.

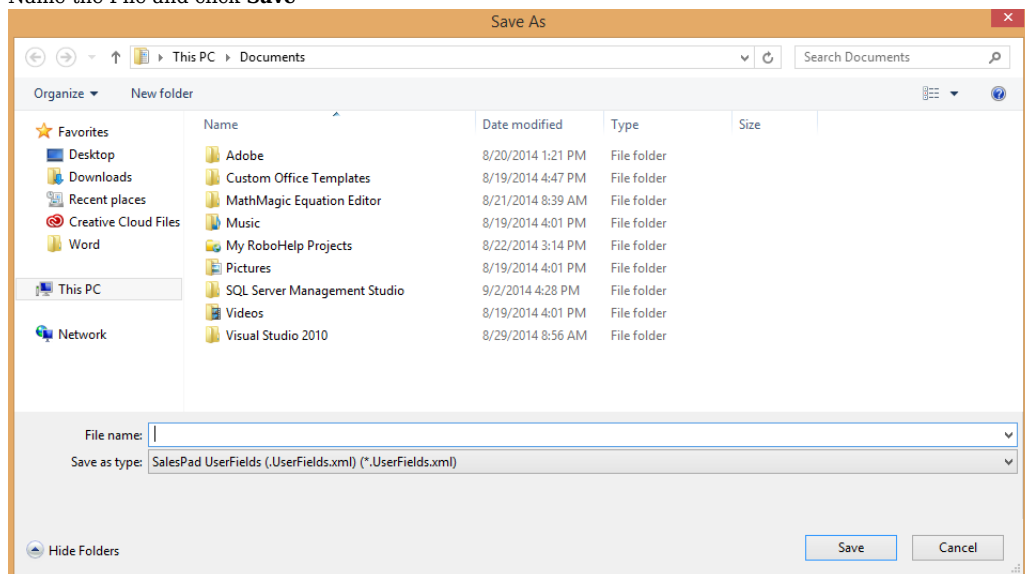
Importing and Exporting Userfields

1. Select an object in the Userfield Editor and click **Export**.

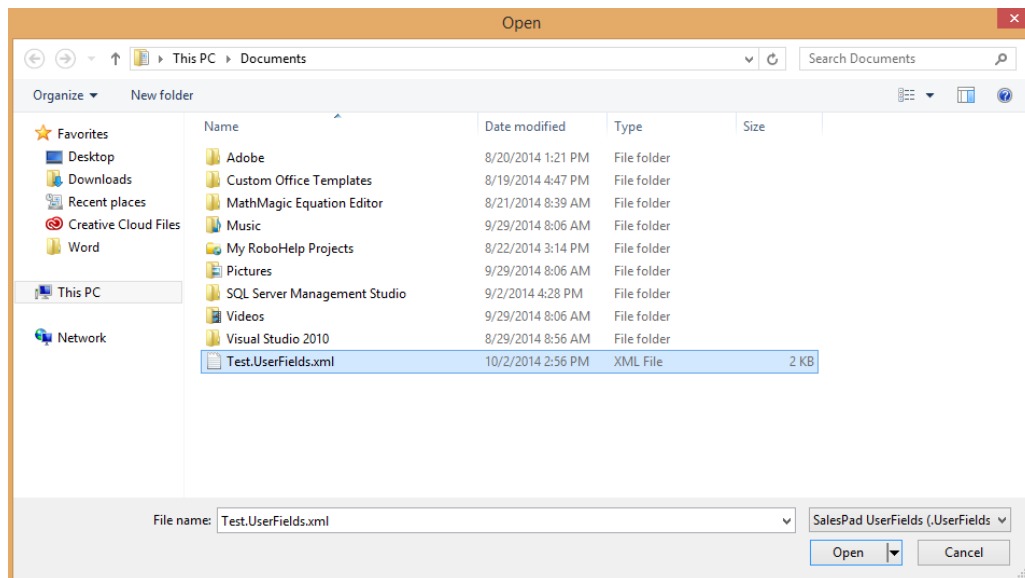


This will create an xml file that contains all the userfields for that object.

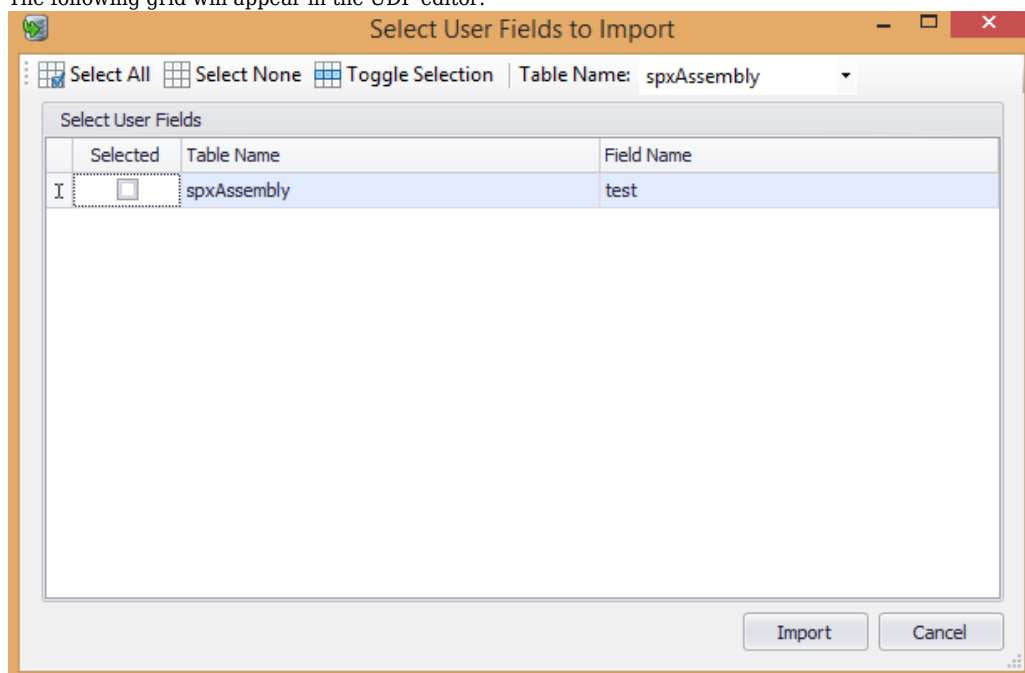
- Find your folder destination
- Name the File and click **Save**



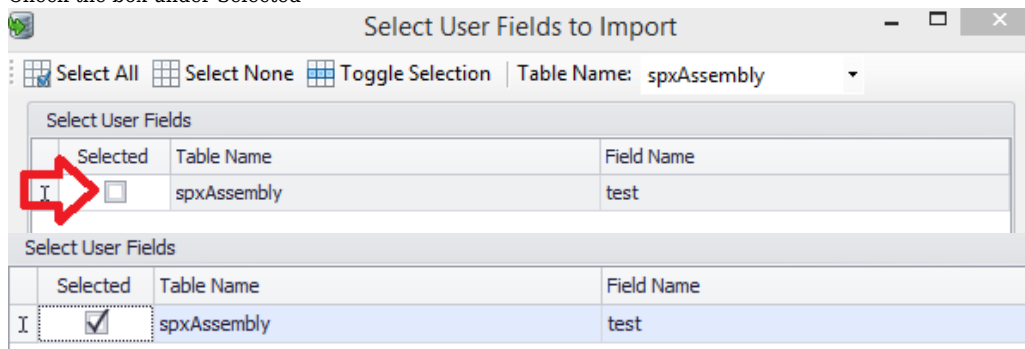
- For importing, select the same object and click **Import** and browse to your xml file.
This will load up a grid where you can put check marks next to the userfields you want to import.



The following grid will appear in the UDF editor:




- Check the box under Selected



- Click **Import**

Select User Fields

	Selected	Table Name	Field Name
I	<input checked="" type="checkbox"/>	spxAssembly	test



Your UDF will be imported.

Adding and Using UDF in Additions

1. Open Microsoft Dynamics GP

Welcome to Microsoft Dynamics GP

Microsoft Dynamics GP 2013

Server: Dynamics GP 2013
 Authentication: SQL Server Account
 User ID: SE
 Password:
☐ Remember user and password

Version : 12.00.1745

OK Cancel

2. Enter your password
3. Click on one of the Business Objects

Example: "Sales" and "Sales Transaction Entry" The following screen will appear:

Sales Transaction Entry - TWO (sa)

Save Actions AA Attach Options View Additional Go To File Print E-mail Tools Help Add Note

Type/Type ID: Order DISTRIBUTION Date: 4/12/2017

Document No. Batch ID

Customer ID Default Site ID: WAREHOUSE

Customer Name Customer PO Number

Site To Address Currency ID

Line Items to Order Entered

Item Number	U of M	Qty Ordered	Unit Price	Extended Price

Amount Received: \$0.00 Subtotal: \$0.00

Terms Discount Taken: \$0.00 Trade Discount: \$0.00

On Account: \$0.00 Freight: \$0.00

Comment ID Miscellaneous: \$0.00

Tax: \$0.00

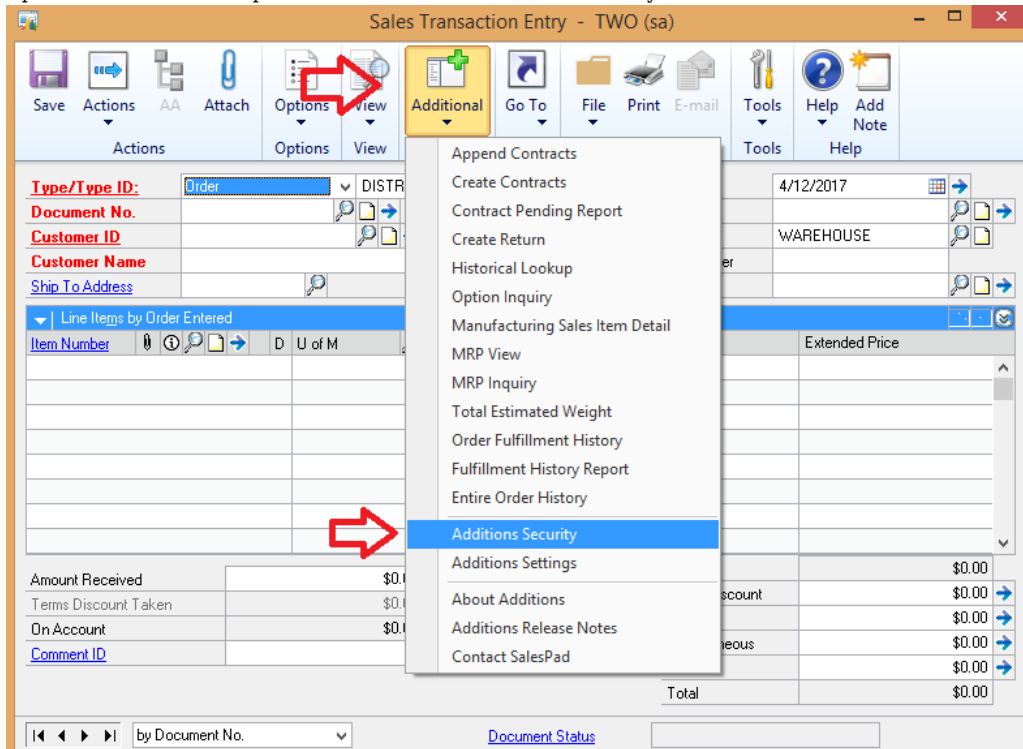
Total: \$0.00

by Document No. Document Status

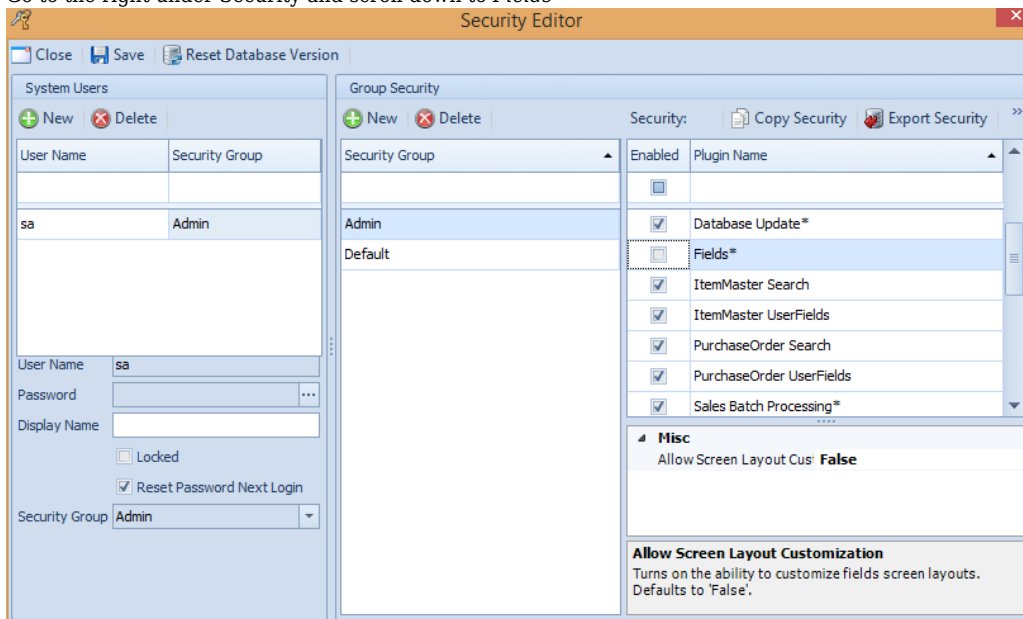
Ready

Before you can edit the fields, you must enable the security settings

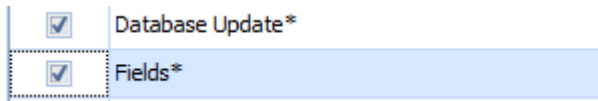
4. Open the **Additional** dropdown menu and click Additions Security



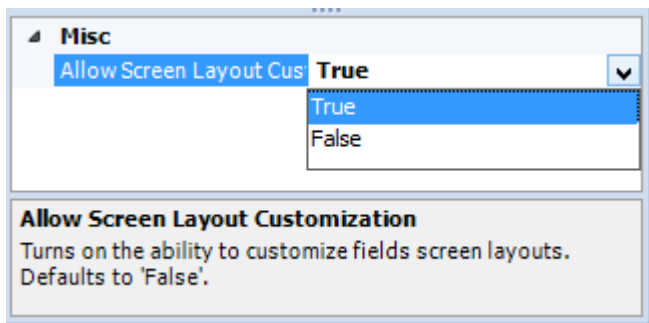
5. Go to the right under Security and scroll down to *Fields*



6. Enable *Fields*



7. Set *Allow Screen Layout Cus* to True.

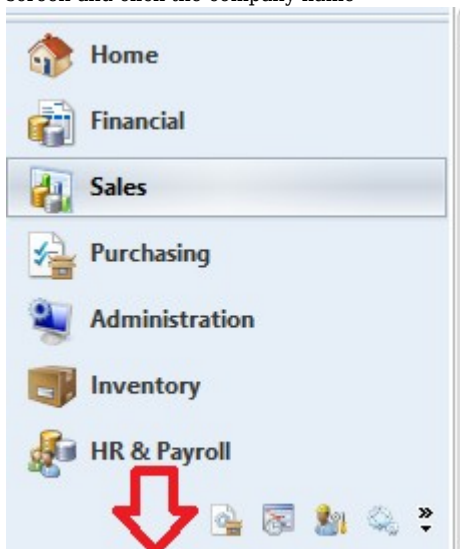


Misc

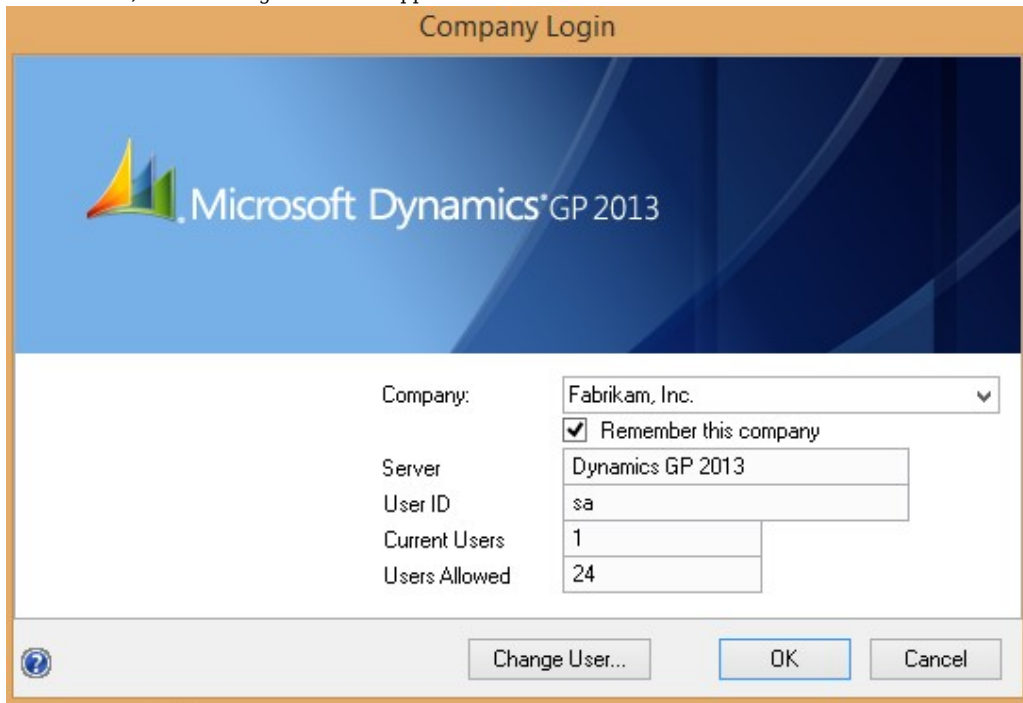
Allow Screen Layout Customization: **True**

Allow Screen Layout Customization
Turns on the ability to customize fields screen layouts. Defaults to 'False'.

8. Click **Save** at the top of the Security Editor.
9. You may need to refresh your company for the changes to take effect. Scroll to the bottom left of your screen and click the company name



Once clicked, the following screen will appear:



Company Login

Microsoft Dynamics GP 2013

Company: Fabrikam, Inc. ☒ Remember this company

Server: Dynamics GP 2013

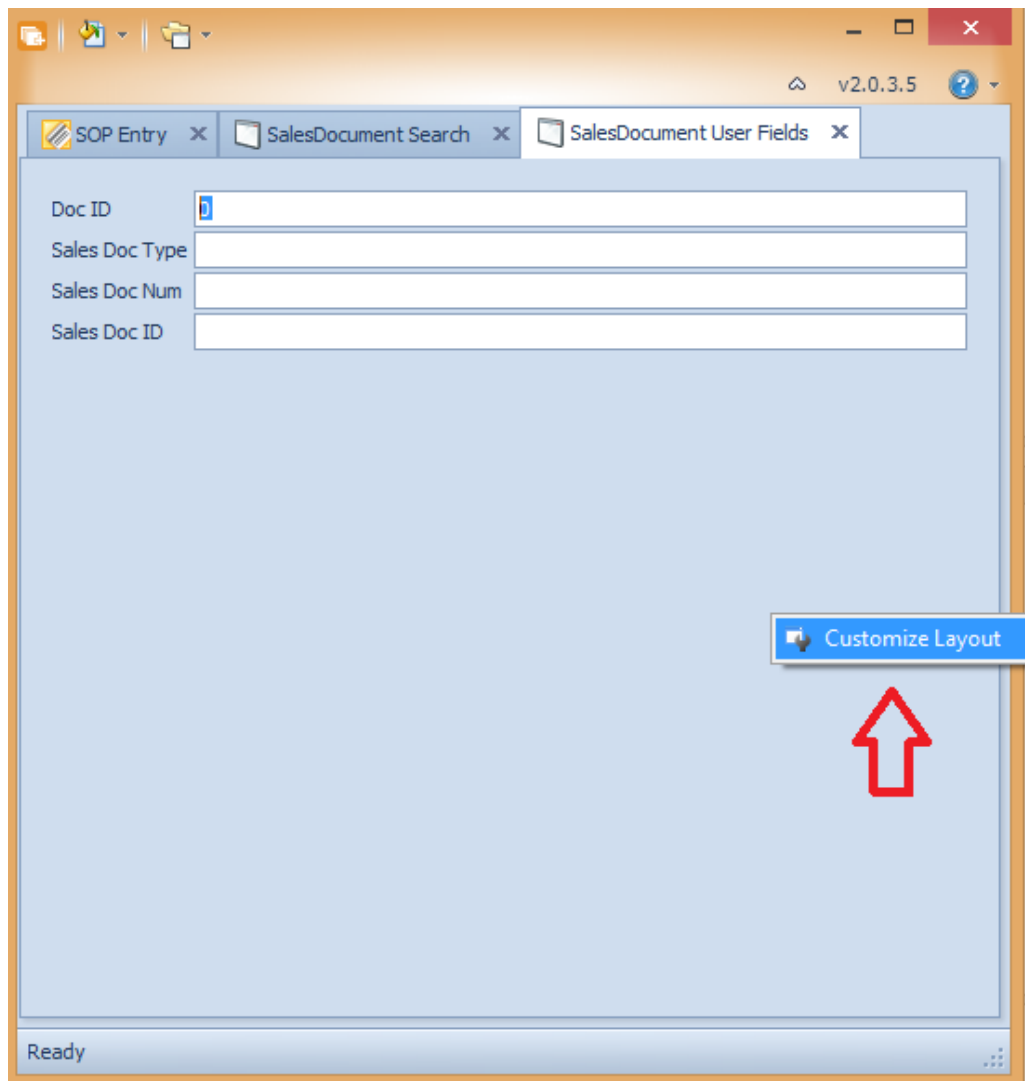
User ID: sa

Current Users: 1

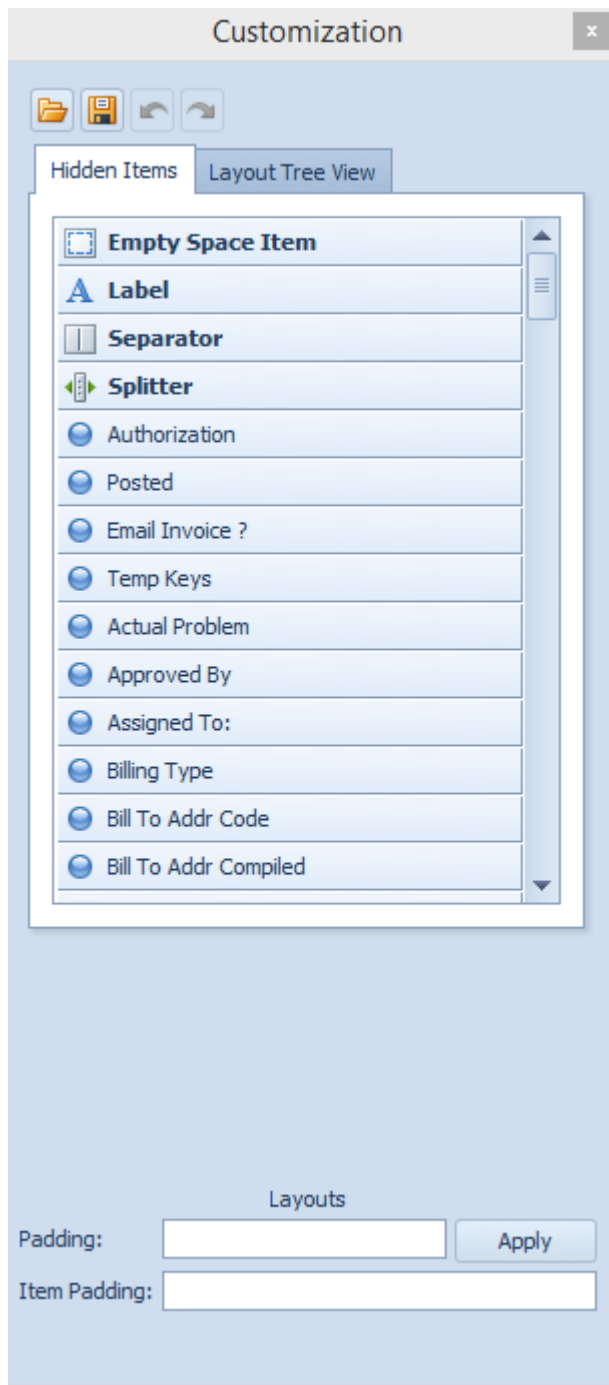
Users Allowed: 24

Change User... OK Cancel

10. Click **OK**
11. Reopen the Additions screen in the area you previously worked (sales, purchasing, inventory)
12. Return to the Additions screen
13. Right click on your mouse to and open Customize Layout

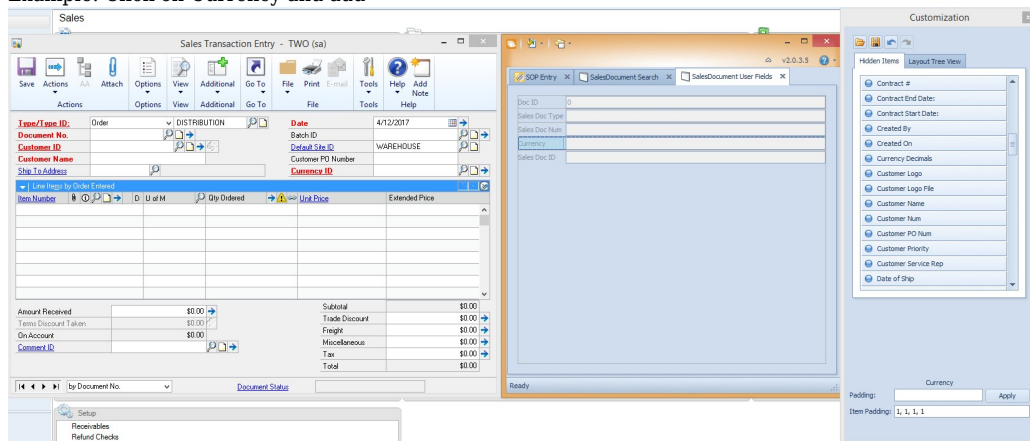


The following screen will appear:

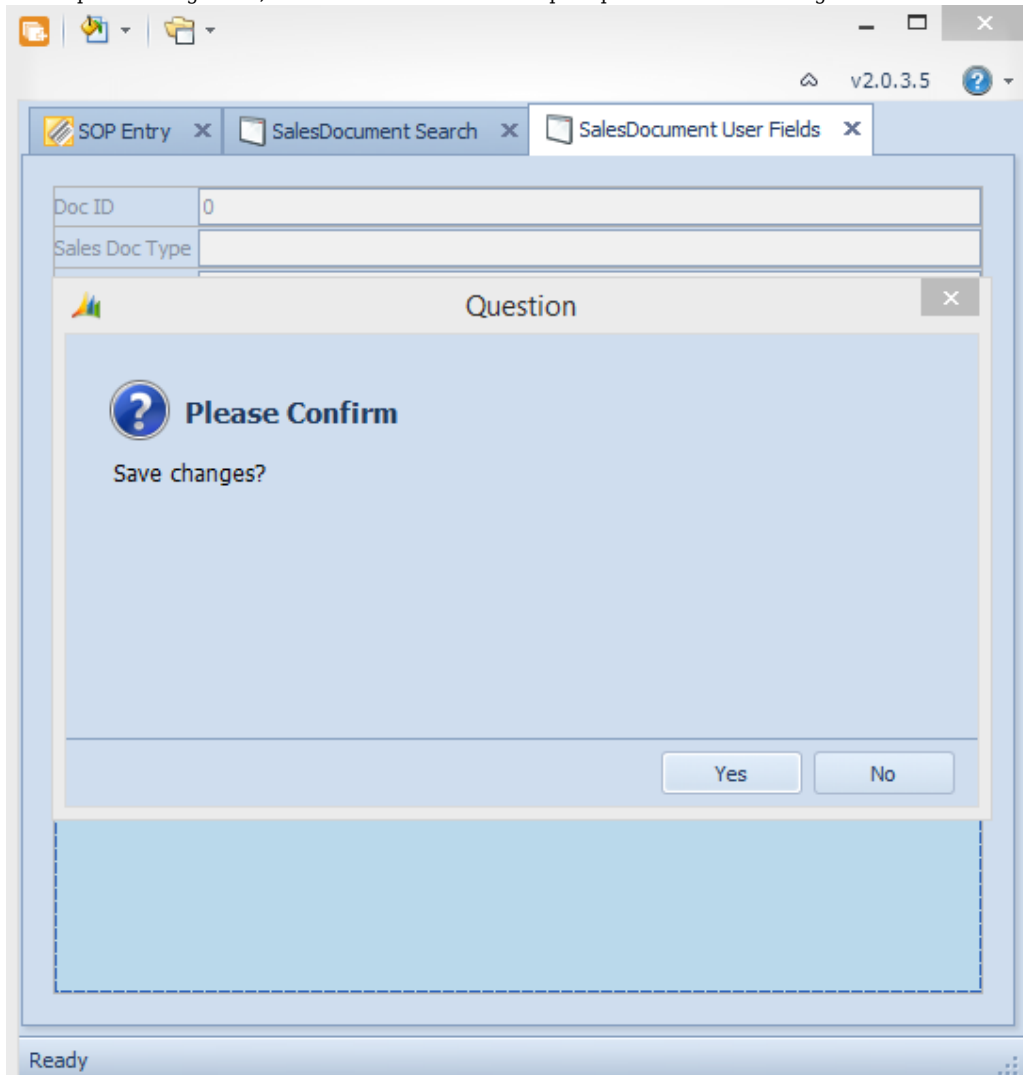


14. Click on the business object you want to appear.

Example: Click on Currency and add



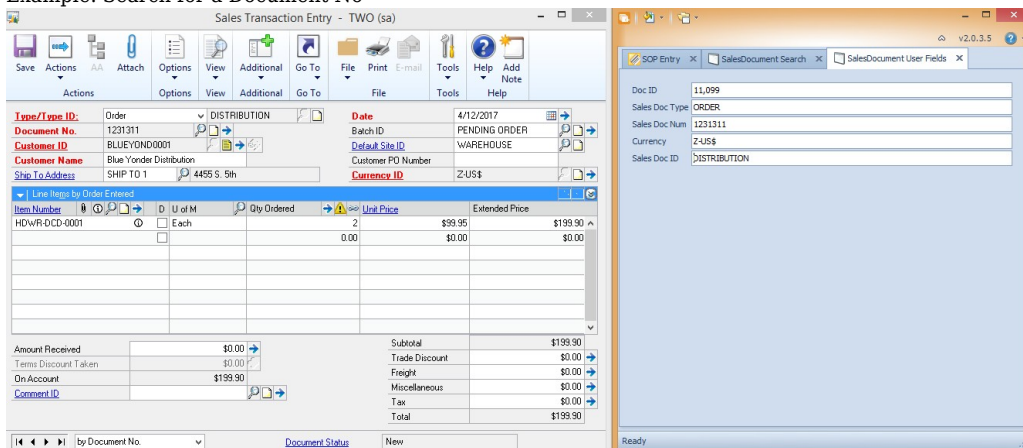
- To complete adding UDFs, click the **exit** button and be prompted with the following screen:




Your GP Additions screen should be reflected with the changes you just made

- Do a search in the GP screen or in the Additions search and look at the data reflected in the additions window


Example: Search for a Document No




The search in GP or Additions will populate information in the UDF. Below is an up close view of the results:



SOP Entry



SalesDocument Search



SalesDocument User Fields

Doc ID

11,099

Sales Doc Type

ORDER

Sales Doc Num

1231311

Currency

Z-US\$

Sales Doc ID

DISTRIBUTION

Ready