User Defined Fields for SalesPad+

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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

Purchase Order Entry

PO Number, PO Status, PO Type

Item Master

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 SalesPad GP System Requirements)
- Refer to SalesPad GP: SalesPad Installation & Connection Guide for SalesPad installation
- Refer to CardControl GP: CardControl Installation Guide for CardControl Installation

Security

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

1. Open SalesPad

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

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

4. 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 SalesPad GP Security Settings

Creating and Editing Userfields

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

   Note: Once it is opened, exiting the User Field Editor is 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 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:

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

   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.
2. Find your folder destination

3. Name the File and click **Save**

4. 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:

5. Check the box under Selected

6. Click **Import**

   Your UDF will be imported.

Adding and Using UDF in Additions

1. Open Microsoft Dynamics GP

2. Enter your password

3. Click on one of the Business Objects

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

   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.

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:

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

15. 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

1. 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: