



User Field Definitions

Megan De Freitas - 2024-12-02 - Settings

Overview

User defined fields allow you to create data fields within SalesPad Cloud, allowing you to customize your SalesPad Cloud experience and quickly access the data that matters most to you. User defined fields are available for:

- Contact tabs
- Customer cards
- Vendor cards
- Item cards
- Purchase orders
- Purchase order lines
- Purchase receipts
- Purchase receipt lines
- Sales documents
- Sales document lines

You can create up to 30 UDFs per business object (Customer card, sales document, etc.).

Data from UDFs can automatically be copied to other business objects if you use the same name and data type. For example, if you set up a UDF on the Customer card called xPriority as a checkbox and you create another UDF on the sales document named xPriority as a checkbox, the value set on the customer will carry over to every sales document created.

Business objects can flow together in the following ways:

- Data stored in Customer UDFs will automatically copy to the same Sales Document UDF.
- Data stored in Customer Address UDFs will automatically copy to the same Sales Document UDF.
 - **Note:** You cannot put the same field on the Customer card, address, and document.
- Data stored in Sales Document UDFs will automatically copy to the same Purchase Order UDF.
- Data stored in Sales Line Items UDFs will automatically copy to the same Purchase Line Items UDF.
 - **Note:** This is true when doing SOP to POP links.
- Data stored in Item Master UDFs will automatically copy to the same Sales Line Item

and/or Purchase Line Item UDF on a sales document or purchase order.

- Data stored in Vendor UDFs will automatically copy to the same Purchase Order UDF.
- Data stored in Vendor Address UDFs will automatically copy to the same Purchase Order UDF.
 - **Note:** You cannot put the same field on the Vendor card, address, and document.
- Data stored in Sales Document UDFs will automatically copy to the same Sales Line Items UDF.
- Data stored in Purchase Order UDFs will automatically copy to the same Purchase Line Items UDF.

To get started, select **User Field Definitions** from the Settings menu.



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User Field Definitions

Create a User Defined Field

To create a user defined field, click the **New Definition** button in the upper right-hand corner of the screen.



The Create User Field Definition drawer will appear. Fill out the information fields in this drawer.



For a brief explanation of the different information fields in the Create User Field Definition drawer, click here:

Create User Field Definition

Entity Type - Specifies which business object the UDF is for; choose from Contact, Customer, ItemMaster, PurchaseLineItem, PurchaseOrder, Purchase Receipt, PurchaseReceiptLine, SalesDocument, SalesLineItem, or Vendor

Column Name - Determines what the dataset is called in SalesPad Cloud's database

Caption - Determines what the UDF is labeled in SalesPad Cloud

Data Type - Specifies the data type for this UDF; choose from Checkbox, Color, Currency, Date, DropDown, Number, Percent, String (a text field with a 250 character limit), or URL

Options - Allows you to enter options to appear in a dropdown data type UDF (this field only

appears for the DropDown Data Type)

Display Order - Determines what order this UDF is displayed in in relation to other UDFs for the same business object

When you've finished entering your information, click **Save**.

Note: Your new UDF will not appear in SalesPad Cloud until you've done a full refresh on your browser.

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Edit a User Defined Field

To edit an existing user defined field, find the UDF in the grid on the User Field Definitions page, then select the **Edit** icon that appears when you hover over the Entity Type column entry for that UDF.



The Edit User Field Definition drawer will appear. Make your changes, then click **Save** to close the drawer.

To make a UDF inactive, open the Edit User Field Definition drawer and click the **Set Inactive** button in the lower left-hand corner.



Note: Any changes made to a UDF will not appear in SalesPad Cloud until you've done a full refresh on your browser.

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See it in Action

UDFs appear in User Fields tabs for Customer, Item, Vendor cards, purchase orders, purchase receipts, and sales documents, and they are available as columns for contacts, purchase order lines, purchase receipt lines, and sales document lines. When UDFs are available as columns, the columns are labeled with whatever text you entered in the *Caption* information field when creating the UDF.



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