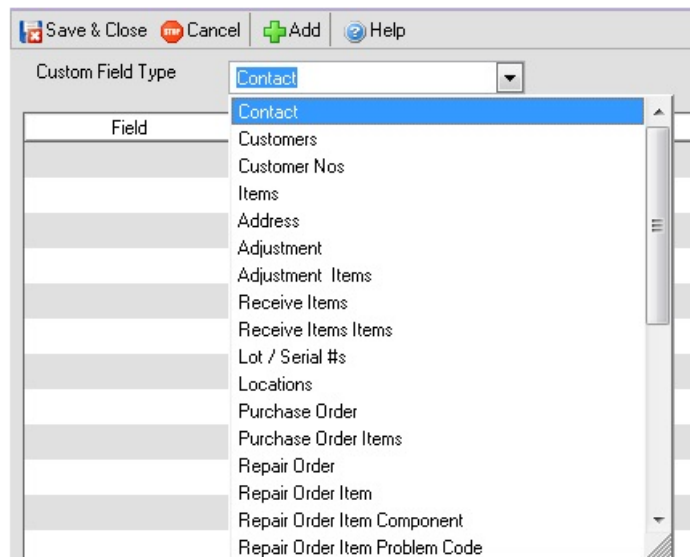


Setting up Custom Fields

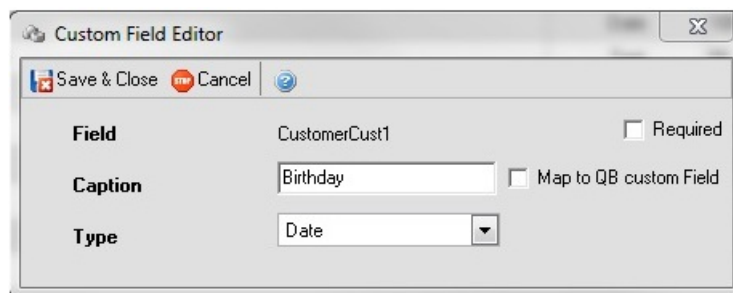
Last Modified on 11/01/2021 1:15 pm EDT

If you find that you need to set up information for one of your lists where there is no corresponding field, you assign a custom field to fill that role. For example, if you're in the habit of sending your customers a greeting card every year on their birthday, you can establish a custom field that will let you track their birthday information.

To create a custom field you must be logged in as the Admin user. Go to the Company menu and select Custom Fields. In the drop-down list marked Custom Field Type, you need to select the List for which you desire to specify a custom field. For transactions (e.g. Purchase Order and Purchase Order Items), the custom field for Purchase Orders will be found on the transactions toolbar, and the Purchase Order Items' custom field is found on the line item.



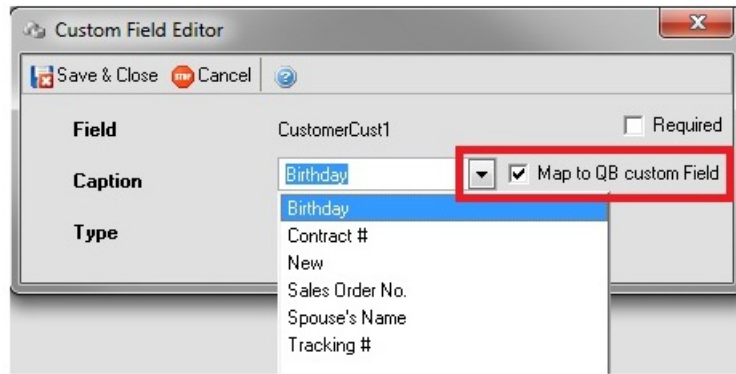
Click Add to add a new custom field and to open the Custom Field Editor.



The following is a description of the above:

Field - represents the actual name of the field in the database. When customizing reports, you will find the Field name in the list of fields, not your caption.

Caption - represents the name of the custom field that the users will see when entering data.

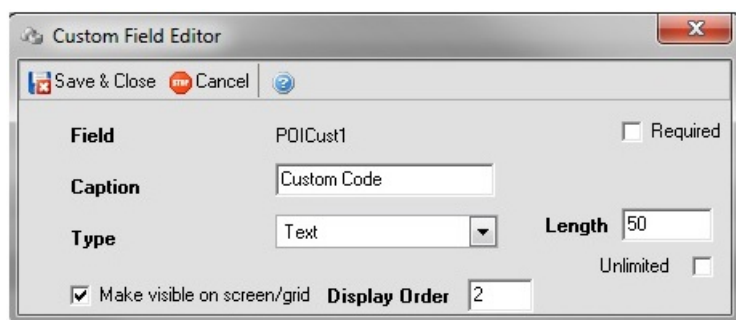


Map to QB Custom Field - if you happen to have the same custom field in QuickBooks, simply click the Map to QB custom Field checkbox. The Caption field will turn into a drop-down list box, allowing you to select from the different custom fields that have been set up in QB.

Type - is the type of field which in the above case is Date. You can also select:

- Text (you can select the size of the field as well)
- Date
- ID
- Cost
- Yes/No
- Quantity
- Pick List
- Price
- Amount

If you select 'Pick List' you will be able to create a custom drop down with pre-defined selections. To add a selection, type the value of the selection then click 'Add', repeat until the entire list is finished.



When creating a custom field that is a text type, check the Unlimited box to make the Length field have an unlimited amount of characters, or assign the number of characters desired.

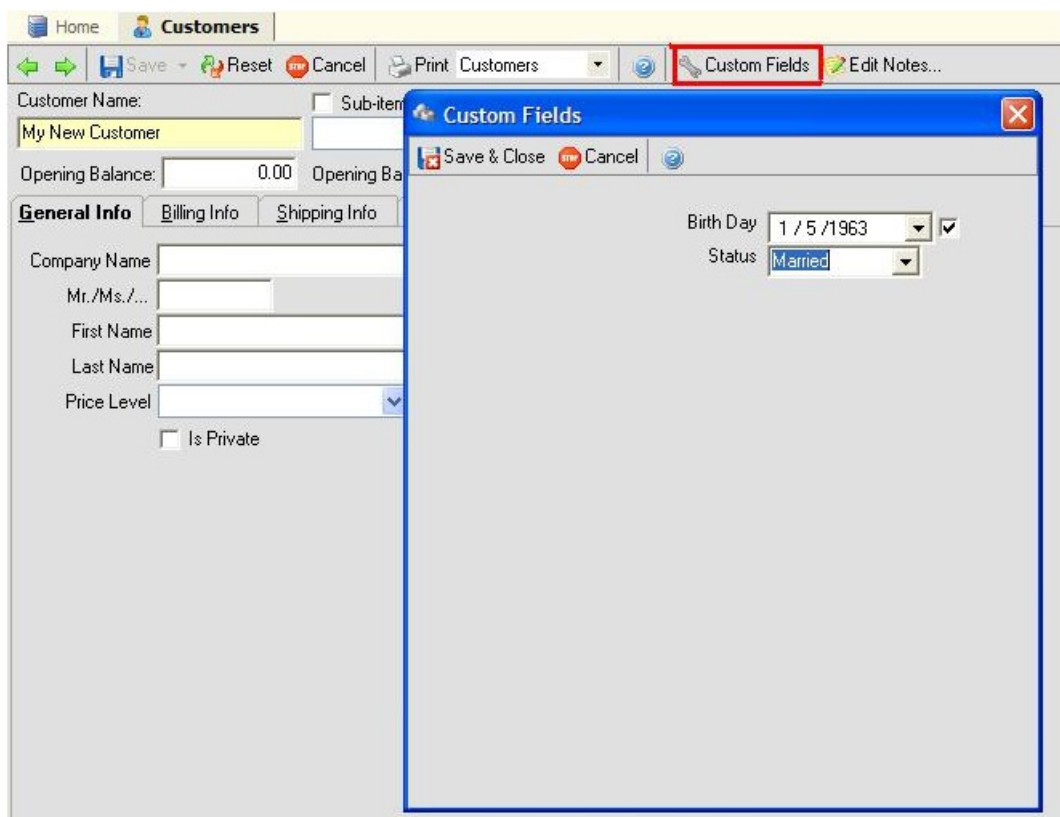
Check the Required box if the user is requires to enter a value in the custom field before being able to save the related entity or document that the customer field is attached to.

Check Make visible on screen/grid if you want to list the custom field on the transaction screen as a column.

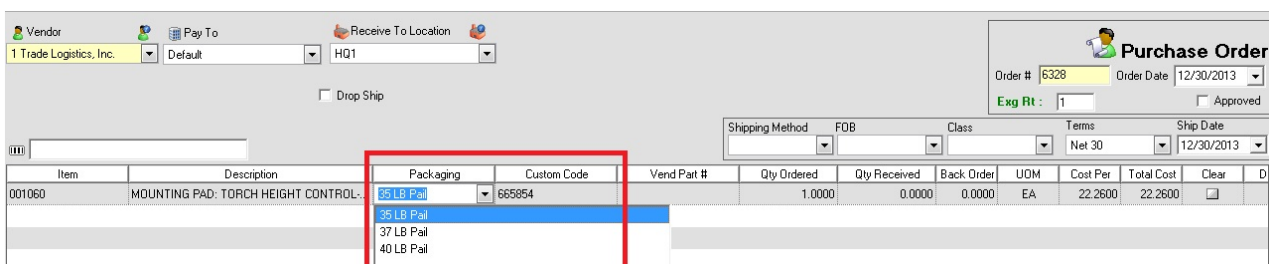
Enter the Display Order to show the order your custom field's column will be listed. Your custom fields will be listed in order before the Quantity Ordered column. This option will only be available for custom fields related to line items on documents which display in a grid format.

When you are done, click Save & Close.

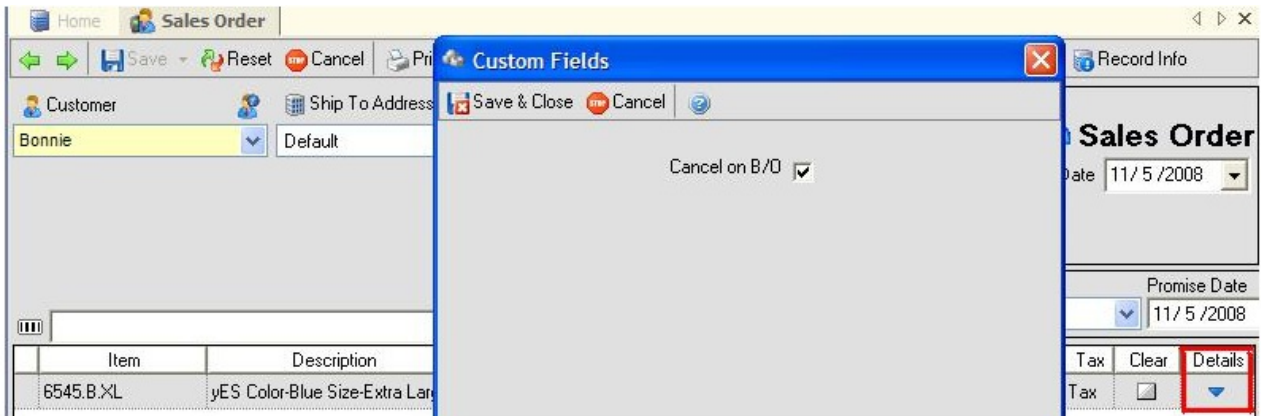
You can access the custom field now from the customer editors and from the toolbar click Custom Fields. If the custom field is for a entire transaction, (e.g. Ship Doc), click the Custom Fields icon from the toolbar.



If the custom field relates to a line item (e.g. Purchase Order Item), and your Make visible on screen/grid is checked, then you will find your custom field listed as a column.



To access the custom fields, when the Make visible on screen/grid is not checked, click the Detail triangle then select Custom Fields.



Note: An entry box can accept multiple lines. After you enter text from the first line press Ctrl-Enter to enter subsequent lines.

All Orders will automatically copy custom fields between records when the custom fields HAVE THE SAME NAME and TYPE. For example, if you also had 'Cancel on B/O' on the sales order and ship doc custom fields, you would enter the value once on the sales order and it would be copied to the ship doc when the sales order is filled. The following table shows how custom fields are copied.

Custom fields from	Copied to
Item	Sales Order Item Work Order Work Order Components Purchase Order Item Receive Items Item Ship Doc Item
Customer	Sales Order Ship Doc
Vendor	Purchase Order Receive Items
Sales Order	Ship Doc
Purchase Order	Receive Items

Sales Order Item

Ship Doc Item

Purchase Order Item (linked transactions only)

Purchase Order Item

Receive Items Item

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