

VERSION 1.0  
NOVEMBER 23, 2017



## TRANSACTION USER DEFINED FIELDS

APP NUMBER: 010006

Powered by:

**MYOB** Greentree

## TABLE OF CONTENTS

Features .....	2
Important Notes .....	2
Other Requirements .....	2
User Instructions.....	3
Sending a communication .....	<b>Error! Bookmark not defined.</b>
Implementation Guide.....	9
App Installation.....	9

## FEATURES

### 1. Transaction User Defined Fields

Do you want to capture additional fields on an invoice, sales order, credit note, or a journal? Or any document dealing with customer, supplier, inventory or GL accounts?

This App lets you create any number of additional user defined fields and then say which screens you want them to appear on. You can even flag them as mandatory, so the record can't be saved until the field has been completed. User Defined Fields are available to the Report Writer, Greentree Explorer, Work-flow Desktop panels and the Alerts and Approvals module, so your options for using the new data are virtually limitless.

The App adds a "Custom" tab to most transaction entry screens, which contains your user defined fields.

---

### IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

---

### OTHER REQUIREMENTS

**Greentree Modules:** General Ledger, Accounts Payable, Accounts Receivable, Inventory, Sales Orders, Purchase Orders.

**Associated Apps:** None

## USER INSTRUCTIONS

### INSTRUCTIONS

System | System setup | Transaction UDF Maint

The screenshot shows the 'Transaction User Field Maintenance' window. The 'Field name' is 'SO Contract'. The 'Masterfile' dropdown menu is open, showing options: Customer, Supplier, GL Account, and Stock Item. The 'Field type' is 'String' and 'Field length' is empty. The table below has columns: Line/Header, Masterfile, Transaction Type, Line Type, and M.

Line/Header	Masterfile	Transaction Type	Line Type	M
Header	Customer			<input type="checkbox"/>

Adding a new Transaction User Field      There are no Transaction User Fields

Type a name for the field – should indicate what it is used for.

Select the Masterfile that the field is applicable to.

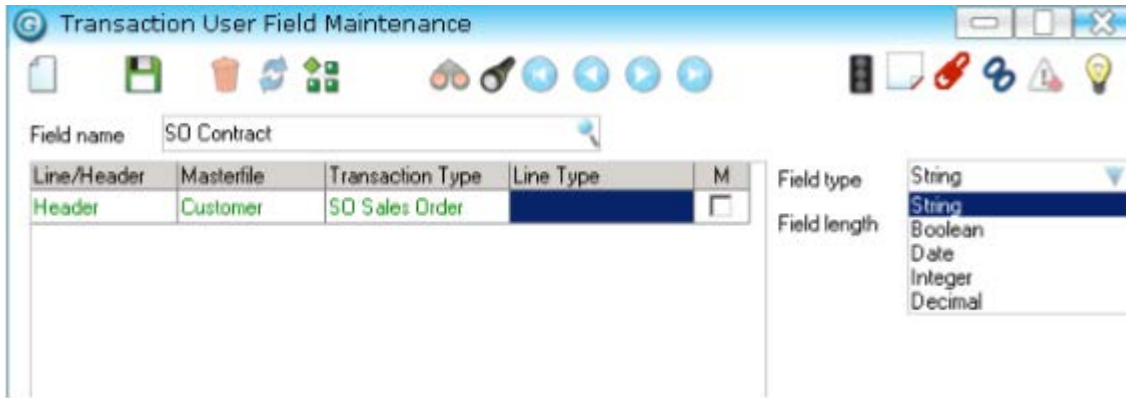
The screenshot shows the 'Transaction User Field Maintenance' window. The 'Field name' is 'SO Contract'. The 'Masterfile' is 'Customer'. The 'Transaction Type' dropdown menu is open, showing options: <All>, AR Invoice, AR Credit Note, AR Journal, Receipt, and SO Sales Order. The 'Field type' is 'String' and 'Field length' is empty. The table below has columns: Line/Header, Masterfile, Transaction Type, Line Type, and M.

Line/Header	Masterfile	Transaction Type	Line Type	M
Header	Customer	<All>		<input type="checkbox"/>

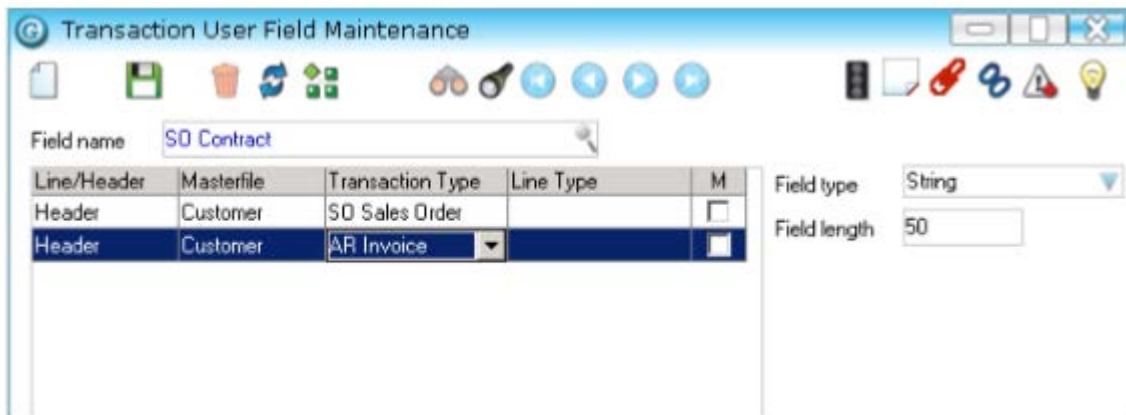
Adding a new Transaction User Field      There are no Transaction User Fields

Select the transaction type the field will be used on

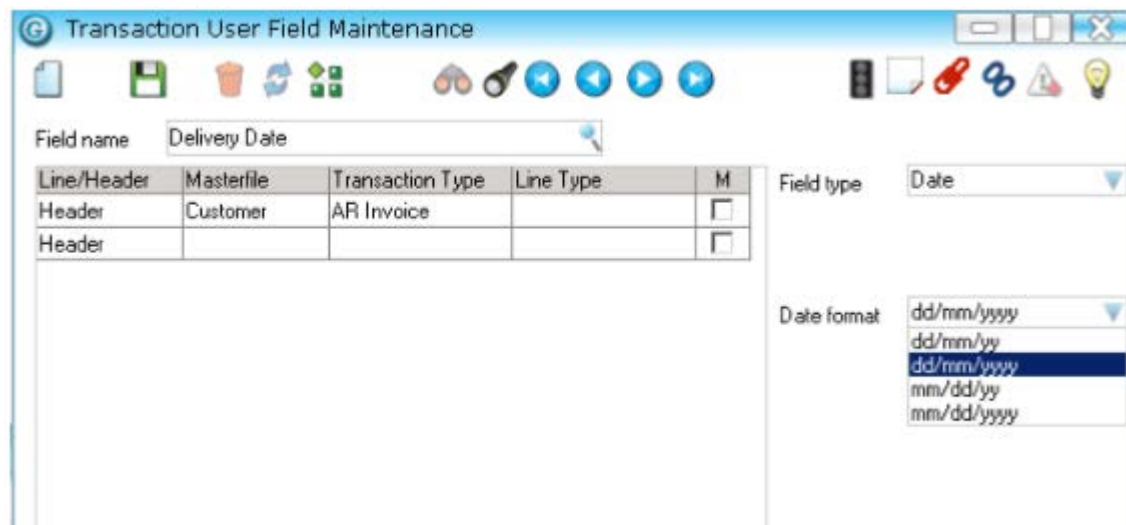
If the field is Mandatory, then check the M column.



Select the type of field required. If the field type is string you need to enter the maximum length for the field.

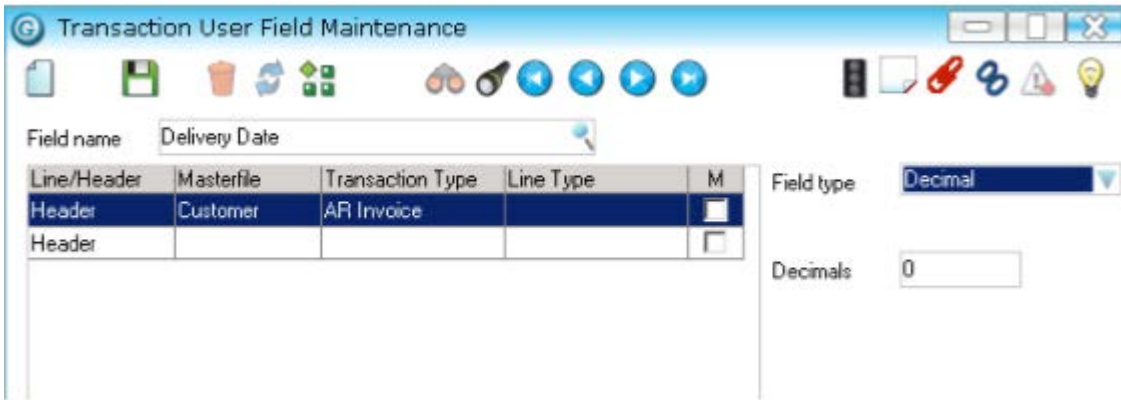


A single field can be applied to multiple transaction types by adding a line for each type it is to be used with.



You can have multiple different UDF against the same transaction type.

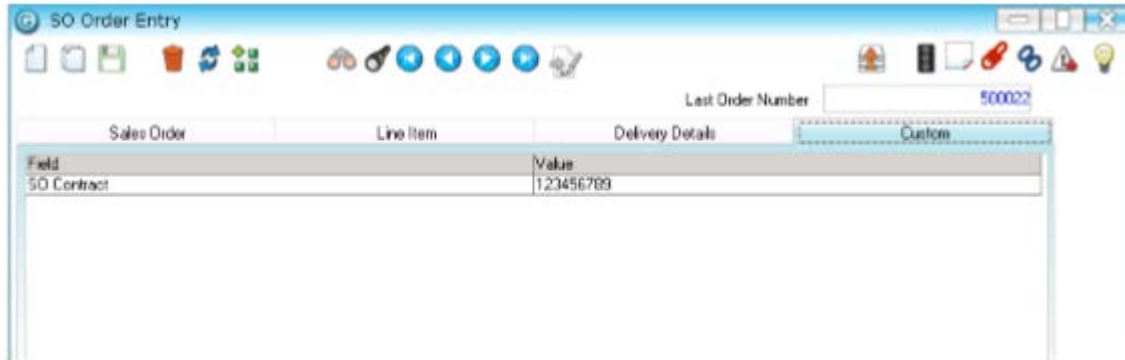
If the field is of type Date then you can select the date format to be used.



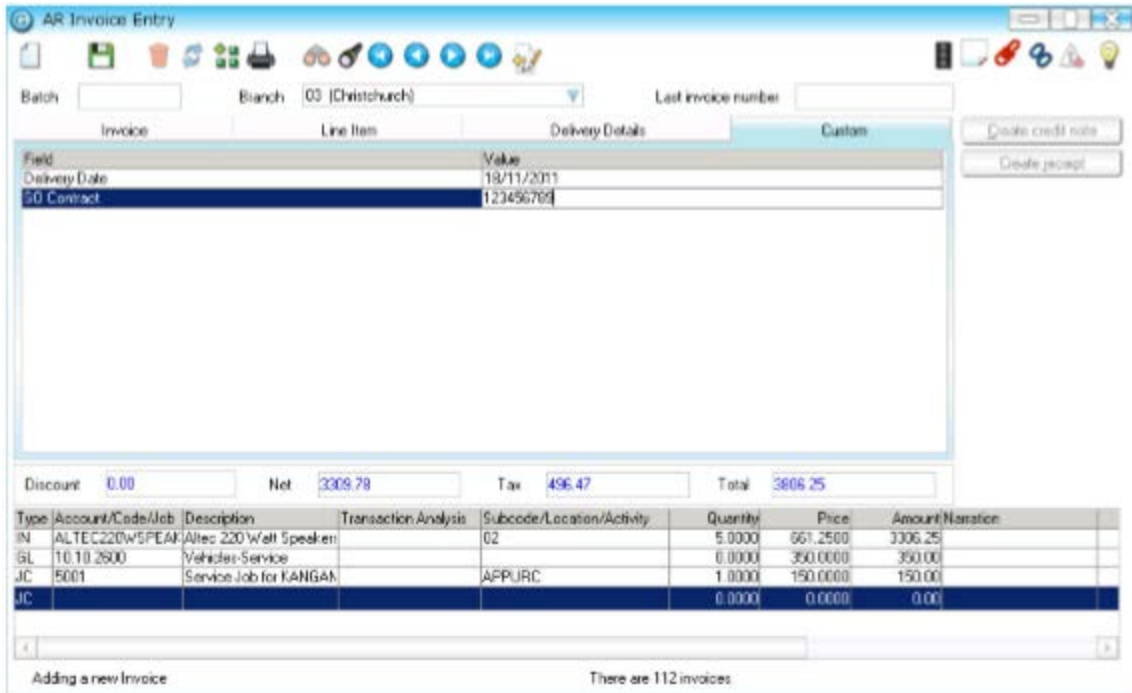
If a field is a decimal you will be asked for the number of decimal places you want the entered number to be stored to.

### Transaction Entry

Your UDF will appear on an additional tab in which ever data entry program is applicable based on the definition of your field.

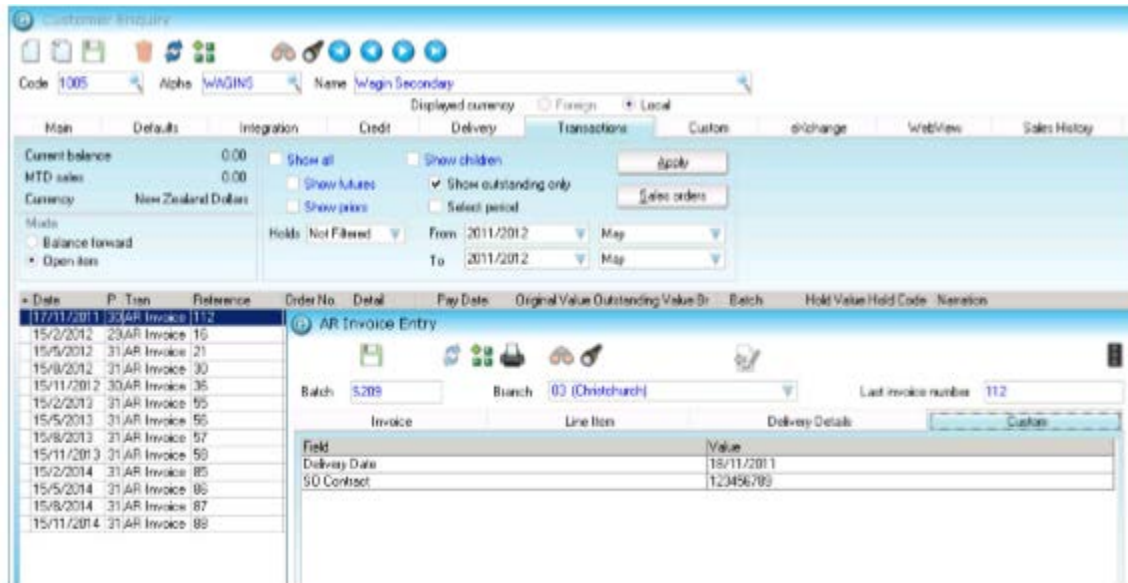


You must manually go to the tab and enter the values next to the fields defined.



This does not limit the type of lines that can be entered into the transaction.

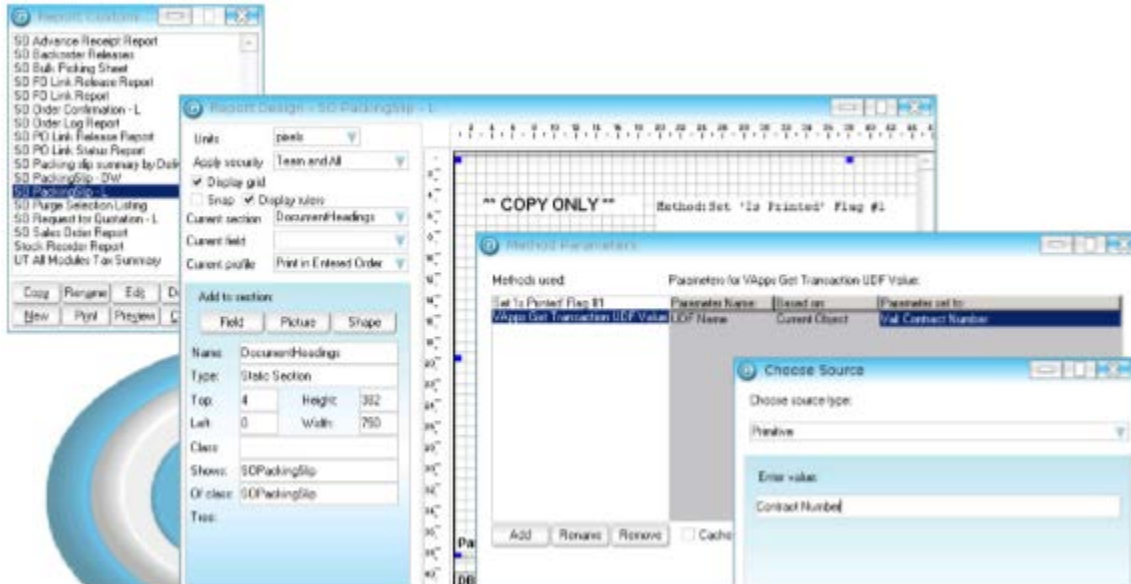
## Recalling Values



When you recall a transaction the UDF values are still visible

## Report Writer

Under Customization, Report you can add the fields.



There is a new method field that can be added to any section based on the same class as the UDF.

VApps Get Transaction UDF Value

This method should be setup as a primitive and the name of the UDF entered.



The method field is then added to the report for printing.



<b>e-Computers - NZ</b> <b>456 Main Road</b> <b>Albany Auckland 1311</b>		<b>PACKING SLIP</b> <b>500023.01</b>
<b>Invoice to</b> <b>Wagin Secondary</b> <b>5 Tankerville Road</b> <b>Hoon Hay Christchurch 8002</b>		<b>Date 25/11/2011</b> <b>Cust No 1005</b> <b>Cust Ord 98765432109876543210</b> <b>Page 1</b>
<b>Deliver to</b> <b>Wagin Secondary</b> <b>5 Tankerville Road</b> <b>Hoon Hay Christchurch 8002</b>		

### UDF Value Pass Through

If you enter a value on a transaction that is then used to create another one, the value should pass to the other transactions.



## IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

### APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** | 3.  
Enter the New Registration Codes supplied and click Install App

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010025	SO Freight	Functionality to add Freight rule to Sales Orders	<input checked="" type="checkbox"/>	01 November 2017	100-Edit User	Change	
010026	Points	Points Module to add Points for Customer Sales	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010027	SO Generate Invoice Au	Functionality to allow email of invoices from SO Ge	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	
010029	SO Despatch	Advanced despatch functionality from packing slip	<input checked="" type="checkbox"/>	31 December 2050	0-Edit Users	Change	
010030	AR Credits from CRM Re	Functionality to allow the generation of AR credit n	<input checked="" type="checkbox"/>	31 December 2099	24-Edit Users	Change	

4. Select/Highlight the **Transaction User Defined Fields** App.

Code	Name	Description	Active	Expiry Date	User Count	Settings	App Count
010006	Transaction UDF	Tab in Transaction Entry for Custom UDF Fields	<input checked="" type="checkbox"/>	31 December 2049	100-Edit User	Change	

5. Click on the **Edit Users** button and select the users who will be configured to use Active Directory Integration, for which companies.

User	e-Computers - Australia (0)	e-Computers - Canada (0)	e-Computers - USA (05)	e-Computers - NZ (06)	e-Computers - UK (07)
<b>All Users</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
001 EDI AK	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
001 EDI HN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ADMIN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amanda	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
andrew	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Angela Allen	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
April Aston	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ashlin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.
7. **Save** and **Close** the form.