Solutions

Unit: Customization Tools

Topic: User-Defined Values

1-1   Add a fixed list of values to a field in a sales order

You want to record some details about an item in a sales order. You will add user-defined values to an existing field in the sales order row. When an item is selected for the order, the salesperson can select information from the list of values.

Choose *Sales – A/R.*

Choose *Sales Order.*

Choose the *Form Settings* icon from the toolbar.

Select Table Format.

Enter **Free Text** in the Find field.

Select the Visible and Active checkboxes for the field.

Choose OK.

The Free Text field should appear in the item row.

Select the Free Text field and add user-defined values by pressing **Alt**+**Shift**+**F2**.

The *User-Defined Values- Setup* dialog box appears.

Choose *Search in Existing User-Defined Values.*

Choose Browse (. . .)

Enter **Fragile, Heavy, Perishable,** and **Liquid-free** as the values.

Choose *Update* after you enter each value in the list.

Choose *OK.*

Choose *Update* to save the user-defined values.

Tip: A magnifying glass should appear in the field to indicate that this field has user-defined values. If you do not see the magnifying glass, open the *View* menu from the top bar and then choose *Pickers Display → User-Defined Values.*

Select an item to go in the sales order.

Select the magnifying glass icon in the Free Text field.

Choose a value from the list defined in the Free Text field.

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1-2 **Add a query as user-defined values to a field in a purchase order.**

When you create a purchase order, you want to show only the items that are supplied by the vendor you have selected in the vendor field.

You will create a query that displays only the items from the vendor you have selected. The query will select items from the items table **OITM** that have the same vendor set as the **Preferred Vendor** in the item master data.

Note: In the OITM table, the field *CardCode* is used to store the preferred vendor. The variable **$4.0.0** is the item number of the selected vendor code.

1-2-1 **Check if there is a preferred vendor in the item master data.**

Choose *Inventory→ Item Master Data.*

Locate an item for purchase.

Choose the *Purchasing* tab.

Choose the selection list icon in the *Preferred Vendor* field and select a vendor from the list. Do not choose the *Browse* button.

Save the item master data.

1-2-2 **Create a database query.**

If you know the SQL for your query, you can type the query directly into the *Query Generator* window. To do this:

Choose **X** to clear out the previous query, if necessary.

Choose *Execute* to open the *Query Preview* window*.*

In the *Query Preview* window, click the *Pencil* icon to activate *Edit* mode.

You can now type the complete query into the *Query Preview* window:

SELECT T0. ItemCode FROM OITM T0 WHERE T0.CardCode = $[$4.0.0]

Note: The $ sign is used to reference the vendor code which is in the active window.

Choose *Save*.

Enter the query name **Preferred Vendor** in the *Query Name* field.

Select the *General* category.

Choose *Save*.

1-2-3 **Create a Purchase Order with user-defined values from a query**

Choose *Purchasing A/P → Purchase Order.*

Choose the vendor that you selected earlier*.*

Position the cursor in the **Item No.** field.

Press *Alt+Shift+F2*.

The *User-Defined Values - Setup* dialog box appears.

Choose *Search in Existing User-Defined Values according to Saved Query.*

Choose *Open Saved Query.*

Expand the *General* category and select the query you saved earlier.

Choose *OK.*

Choose *Update.*

In the **Item No.** field, press *Shift+F2*.

The query will run and will show only items for the preferred vendor.

1-3   **Add a query as user-defined values to calculate the delivery date in a sales order.**

When you create a sales order, you want the system to automatically set the **Delivery Date** to the value of the Posting Date + 7 days. The query will use the sales order table **ORDR**.

1-3-1   **Create a database query.**

Choose *Tools → Queries → Query Generator.*

Choose *Execute.* Ignore the error message.

Type a new query as:

SELECT $[ORDR.DocDate.DATE]+7

Choose *Save*.

Note: The syntax above only works for sales orders (table ORDR). To use the same query in another similar document, use the item number syntax:

SELECT $[$10.0.DATE]+7

Save the new query in the *General* category.

1-3-2   **Add the query as user-defined values to a Sales Order**

Choose *Sales – A/R → Sales Order.*

Position the cursor in the *Delivery Date* field.

Press *Shift+Alt+F2*.

Choose *Search in Existing User-Defined Values according to Saved Query*.

Choose *Open Saved Query*.

Choose the query you just saved.

Choose *Auto Refresh When Field Changes*.

Choose **Customer/Vendor Code** from the dropdown list.

Select *Display Saved User-Defined Values*.

Choose *Update*.

In the **Sales Order**, choose a customer.

The system will automatically insert a **Delivery Date** that is 7 days later than the **Posting Date**.

1-4   **Add a query as user-defined values using refresh regularly**

The company's sales staff needs to see the customer's existing balance when they are on the phone taking a new sales order. The balance wil display in a user-defined field added to the sales order header.

1-4-1   **Add a user-defined field**

Choose *Tools → Customization Tools → User-Defined Fields – Management.*

Open *Marketing Documents.*

Choose *Title*.

Choose *Add*.

Enter the following data:

Field Name or Data Type	Values
Title	**Balance**
Description	**Acct Balance**
Type	**Units and Totals**
Structure	**Amount**

Choose *Add*.

1-4-2 Create a query to fetch the business partner balance from the database

Using the Query Generator, create the following query:

SELECT T0.[Balance] FROM OCRD T0 WHERE T0.[CardCode] = $[$4.0.0]

Save the query as **Account Balance** under any category.

Note: The item number for the business partner code in all marketing documents is 4.

Note: To test this query *before* you add it as user-defined values, follow these steps:

  i. Open a blank sales order.

  ii. Select a valid customer code.

  iii. With the sales order as the active window, run the query by choosing *Tools → Queries → User Queries → Category → Query name*

  iv. The query preview window will show the customer's balance.

1-4-3 Add the query as user-defined values to the user-defined field

Open a blank sales order.

To open the window for user-defined fields, choose *View → User-Defined Fields.*

Add user-defined values to the new **Balance** field by pressing **A*lt*+*Shift*+*F2***.

Choose *Search in Existing User-Defined Values according to Saved Query.*

Select the query you saved earlier.

Select *Auto Refresh When Field Changes*.

Select the **Customer/Vendor Code** field.

Choose *Refresh Regularly*.

Choose *Update*.

1-4-4 Test the user-defined field

In the open sales order, select a customer.

When you select the customer code the query will run and the account balance will appear in the new field.

Note: Although the new balance field will display in other types of marketing document, the user-defined values will not be added to the field. You will need to add the query to each document type if required. Because the query will work across all document types, you can re-use the same query.

1-5   Add a query as user-defined values to set the discount % in a sales order

Light & Music wants to give 5% discount on sales orders, provided there are no overdue payments from the customer, and the customer has placed an order previously during the last 6 months.

1-5-1 Create a query

The query will set the discount in a sales order to 5% if the count of open, due invoices is 0 and if there is at least one open sales order for the customer.

If (Select count(DocNum) from OINV where CardCode = $[ORDR.CardCode] and DocStatus = 'O' and DocDueDate < getdate()) = 0

>   **Begin**

>>   **If (Select count(DocNum) from ORDR where CardCode = $[ORDR.CardCode] and DocDate > dateadd(month, -6, getdate()))>0**

>>>   **Select 5**

>>   **else**

>>>   **Select 0**

>   **End**

else

>   **Select 0**

Save the query.

1-5-2 Add user-defined values to the discount field

Add user-defined values to the discount field in the header area of the sales order document.

Open a sales order document.

Position the cursor in the **Discount** field in the sales order header.

Press *Alt+Shift+F2*.

The *User-Defined Values - Setup* dialog box appears.

Choose *Search in Existing User-Defined Values according to Saved Query.*

Choose *Open Saved Query.*

Select the query.

Select *Auto Refresh When Field Changes.*

Select the **Customer/Vendor Code** field.

Select *Display Saved User-Defined Values.*

Choose *Update.*

1-5-3 Test the query

Create a sales order for a customer.

Create a second sales order for the same customer. When you select the customer code, you will see the discount set to 5 % and automatically applied to the sales order.