Solutions

Unit: Customization Tools

Topic: User-Defined Fields and Tables

1-1 Add a user-defined field with a list of values

The customer wants to add a new field to record the status level of a customer – Bronze, Silver, Gold and Platinum.

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

Select ***Master Data > Business Partner > Business Partner.***

Choose ***Add***.

Enter the following data:

Field	Values
Title	**Level**
Description	**Status Level**
Type	**Alphanumeric**
Structure	**Regular**

Select ***Set Valid Values for Field***

Choose ***New*** and enter the following data:

Value	Description	Then Choose
B	**Bronze**	**New**
S	**Silver**	**New**
G	**Gold**	**New**
P	**Platinum**	**New**

Choose ***Add***.

Choose ***Yes*** to the system message.

Open an existing customer master data record.

To see the new user-defined field, choose ***View → User-Defined Fields.***

Open the dropdown list to see the status levels.

Select a level and update the master data record.

Note: If you set a default value for the new field, the default value will appear in new master data records but not existing master data records.

1-2 Add a user-defined field to the document row level

The customer wants to add a new field to hold special instructions for picking an item in the warehouse.

1-2-1 Add a user-defined field

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

Select ***Inventory → Pick List - Rows.***

Choose ***Add***.

Enter the following data:

Field	**Values**
Title	**Instructions**
Description	**Special Instructions**
Type	**Alphanumeric**
Structure	**Text**

Choose ***Add***.

1-2-2 Test the user-defined field

Create a pick list: Choose ***Inventory → Pick and Pack → Pick and Pack Manager.*** Select relevant sales orders for picking.

Find the created pick list: Choose ***Inventory → Pick and Pack → Pick List.***

Scroll to the right of the item row to see the new field.

You can enter freeform text in this field.

1-3 Add a user-defined field for a link

When you add a new sales opportunity, you want to store a link to the customer's web site.

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

Select ***Sales Opportunities → Title***

Enter the following data:

Field	**Values**
Title	**Link**
Description	**Link**
Type	**General**
Structure	**Link**

Choose ***Add***.

Open a new sales opportunity. Choose ***Sales Opportunities → Sales Opportunity.***

Select a business partner.

Open the side panel to display user-defined fields. Choose ***View → User-Defined Fields.***

Double-click in the Link field.

Provided that you have set the path to the *Attachments* folder in the *General Settings*, a window will open for you to select a file. Instead of selecting a file from the Attachments folder, type an address, such as www.sap.com, in the **File Name** field and choose Open. The url will be saved in the Link field.

Double-click the Link field to open the web site from the sales opportunity.

1-4 Add a User-Defined Table

The company wants to record the source for each new customer. The list of sources is currently: Website, E-mail, Trade Publication, and Other. Sales staff should have the flexibility to add to this list when they process and order.

In this exercise, you will create a user-defined table to store the list of sources. You will then link this user-defined table to a user-defined field in the master data and in sales orders, so that end users can add new rows to the table to record additional sources.

1-4-1 Create a user-defined table

Choose ***Tools → Customization Tools → User-Defined Tables – Setup.***

Create a table with the name **Source**.

Choose **Update**.

1-4-2 Enter data in the user-defined table

Choose ***Tools → User-Defined Windows*** and select the table. **Note:** this menu option is not active until after you add the user-defined table.

Enter data for the table:

Code	Name
1	Website
2	E-mail
3	Trade
4	Publication

Note: You need to choose **Update** to enter each row in the table.

Choose **OK.**

1-4-3 Link the table to user-defined fields

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

Open ***Master Data → Business Partner → Business Partner*** and add a user-defined field called **Source** in the header area of the business partner master data. Leave the Type as Alphanumeric and the Structure as Regular. Do not set any valid values for this field.

Choose *Set Linked Table* and select the **Source** table.

Choose **Add**.

Open the ***Marketing Documents*** category and add a second user-defined field called **Source** to the Title area. Leave the Type as Alphanumeric and the Structure as Regular.

Choose *Set Linked Table* and select the **Source** table.

Choose **Add**.

1-4-4 Access the user-defined table

Open a master data record.

Open the side panel to view user-defined fields.

Select the **Source** field.

You can select a value from the entries in the dropdown list or you can choose ***Define New*** to add a new row to the table.

Open a sales order document.

Open the side panel to view user-defined fields.

You can access the Source table from the user-defined field in the panel.

1-5 Add a user-defined table with additional columns

In this exercise, you will create a table to manage the company's fleet of delivery trucks.

1-5-1 Create a new user-defined table

Tools → Customization Tools → User-Defined Tables – Setup.

Create a table with the name **Trucks**.

Choose **Update.**

1-5-2 Enter data in the user-defined table

Choose ***Tools → User-Defined Windows*** and select the table.

Enter data for the table. The Code field ensures a unique key.

Code	Name (Registration No.)
1	**4236790**
2	**1569013**
3	**7895478**

1-5-3 Add additional columns to the user-defined table

Add each column as a user-defined field. Choose ***Tools → Customization Tools → User-Defined Fields – Management.***

Scroll to the bottom of the window and expand the *User Tables* category.

Select the row for the **Trucks** table and choose **Add**.

Enter the following data:

Field	**Value**
Title	**Capacity**
Description	**Capacity**
Type	**Numeric**
Structure	

Choose ***Add***.

Field	**Value**
Title	**Make**
Description	**Make**
Type	**Alphanumeric**
Structure	**Regular**

Choose ***Add***.

1-5-4 Enter data in the additional columns

Choose ***Tools*** → ***User-Defined Windows*** and select the **Trucks** table.

Adjust the width of the columns to make the three new columns visible in the window.

Enter data into the new columns. For example:

Capacity	**Make**
500	**Mercedes**
750	**Ford**
350	**Nissan**

Note: To make the **Trucks** table visible in a document such as a delivery, add a user-defined field to the Marketing Documents object, and link the **Trucks** table to this field. You can also use the table in reports and queries.