

Advanced Custom Fields in Sybiz Vision – Part 2

Please note that information in this document may have changed since this document's creation. Document Creation Date: April 2004

In "Advanced Custom Fields in Sybiz Vision" we showed you how to add custom fields into Sybiz Vision that would enable that field to be written to and read from within the accounting package.

Once a field is added to Sybiz Vision it can be used to add more functionality to your accounting system by allowing the fields to be used in reporting as well as when producing transaction documents (e.g. Sales Orders)

Reports

Let us say that a custom field is required that shows a customer's 1800 number.

Using the article from last month a custom field can be added to the customer file. Once a database structure check is performed then a 1800 number can be entered against that customer's record in customer maintenance.

It is now in the database, however the only way it can be viewed is by going into Sybiz Vision and performing a view on that customer. Now a salesperson requires a hard copy of all the telephone numbers for each customer so that they can take that information off site. The extra field is not available for standard reports within Sybiz Vision, however the Report Writer has been designed to take advantage of custom fields.

On opening the Report Writer the a screen is displayed advising that a custom field has been added and the Report Writer is confirming that this field will be added and reported on. Clicking "Ignore" simply delays adding the field until the next time the Report Writer is opened. Click the "Add" button unless you are not sure why the field was added.

Enter into Report Writer and note that the custom field appears in two places. The first is the sort order of the report and the second place the custom field appears is to allow selection of that data to be displayed on the report.

This means that a report can now be designed and printed that allows the sales person to have a hard copy of all the contact numbers for each customer.

Transaction Documents

Certain transaction documents eg Sales Order and Sales Invoices can utilise custom fields on the forms, prompting the user to enter information on processing a transaction, and having that information appear on the transaction document.

To allow this to occur the custom field must be created in a master record pertaining to the type of transaction being posted. Eg to have a custom field in for sales invoicing requires the custom field to be added to debtors. The custom field must be added to the form prior to processing a transaction.

Generally custom fields added to Sybiz Vision for transaction purposes will not be used for reporting as those custom fields may change per transaction and reporting on non static information in many cases would be pointless.

Once the user processes a transaction using the form with the custom field on it, they will be prompted for "Special Information" being the information they want to enter to display on this particular document.

Once the information is entered and processed the document will print out with the information entered by the user. This will then be stored back against the master record as a default for when an invoice is processed against that debtor again. It can be altered at the time of processing or by editing the master record. The information will also be stored in the archive file but not the drill down for that transaction.

An example of a custom field for a transaction document might be a run number on delivery notes to show which run this delivery will occur on.