Newsletter Article

Custom Fields in Sybiz Vision

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Did you know that Sybiz Vision has the ability to allow you to add custom fields to certain files that will allow them to display on the view screen, custom reports and certain forms?

In this article we show you step by step how to add a custom field to your database, so that the fields will display in the finder and view screens.

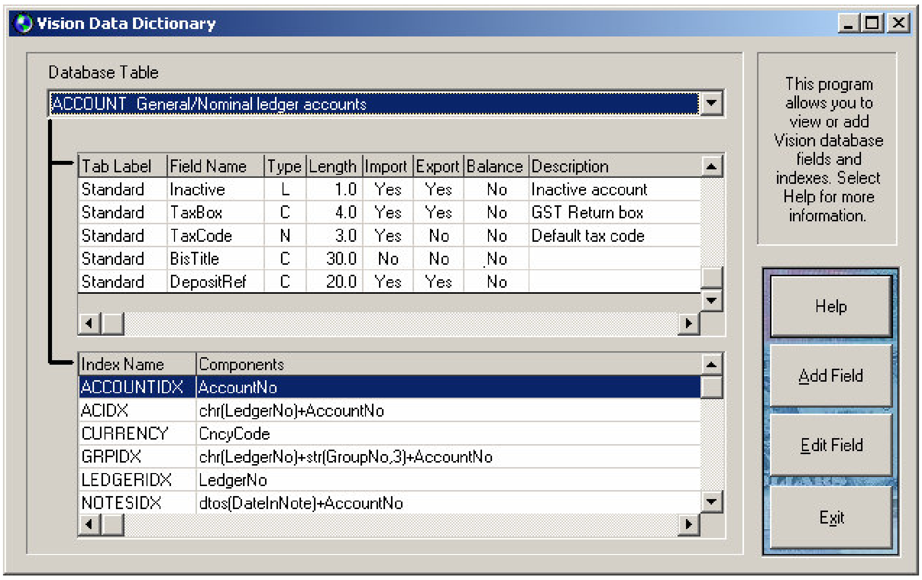
Ensure all users are out of Sybiz Vision.

Obtain a restorable backup of the home directory and all the databases. It is imperative that the home directory is backed up as this is where the structure changes will be made.

Work out the type and details of the field/s you wish to add. The type of field can be a notepad field, a numeric of alpha numeric field, a yes / no field or a date field. The details refer to (where possible) the lenth of the field, any decimals etc.

Open up the Data Dictionary in the Sybiz Vision menu (it will not open unless all users are out of Sybiz Vision).

The following screen appears



Select a master file from the drop down list. Master files are supplier, customer, inventory, account, and job. Fields can be added to any of the files in the list however these would require programming changes by a third party to make use of. The system we are using is programmed into Sybiz Vision and hence will automatically appear when performed correctly.

Now select the Add Field option

First select the field type. Then type in the field name without spaces and ensuring that the first character is a "Z". If the field type allows you, type in the length and number of decimals as well as a description of the field. Then type in the name of the tab you would like it to appear under. There is a maximum of three tabs available each with up to 16 fields.

Finally select the option on whether the field is to be searchable (Index this field) and whether the field can be either imported or exported.

Click the OK button when complete and a message box will appear on screen stating that your changes do not take effect until you have entered the database.

Go into Sybiz Vision and select a company. The program will then go through a database structure check adding in the required fields and indexes, and if all goes well will come to the main screen. Remember that this may take some time and will occur for ALL databases the first time you go into each of them.

Select Add, Edit button and edit an account for the ledger you added the custom field to. Note that a new tab is made available with details of the field you have just added. The view screen will also have the same tab with read only information contained about the field.

Some points to consider

Remember that a change to the data dictionary affects ALL databases. You cannot have three fields of one type in one of your databases and then four fields of another type in another database.

Even though you could add a field to a non-master file eg trans.dbf, the Sybiz Vision program is not designed to pick up fields added to these types of files. Therefore it is recommended that you only add custom fields to master files.

Try and keep the field name to less that eight characters including the "Z", especially if you are adding fields with similar names.

As fields are sorted on the screen in order of field name, to sort your fields in a particular order preface the field name with "01", "02" etc. eg Z01PHONE, Z02EMAIL etc.

Note that 16 fields per tab are the maximum that can be entered. If you have extra long field (greater than 30 characters) you may only get 8 fields per tab.

If you feel that extra fields would be of benefit to your database, and would like a consultant to come and add them in for you please contact The Support House Pty Ltd on 08 8377 3222.