Easy Custom Field Extender- User Guide

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Overview

The Easy Custom Field Extender allows users to extend several entities in the system with up to 3 extra custom fields. Users have a free trial that lasts 30 days and to register the app users need to contact WebSan. If the app is unregistered the custom fields will not appear in the entities. The supported entities are: Customers, Sales Quotes/Orders/Invoices/Cr Memos, Vendors, Purchase Orders/Invoices/Cr Memos, and Items. These are the customizations that can be applied to these fields from the configuration window:

- The label of the field can be changed
- The data type can be changed between text, date and decimal
- The field can be enabled/disabled
- The field can be set as required
- Sales/Purchase document custom fields can have their values default from customer/vendor custom fields respectively

Setup

1) Assign the user app permissions by using the search function and typing "users" in the search field
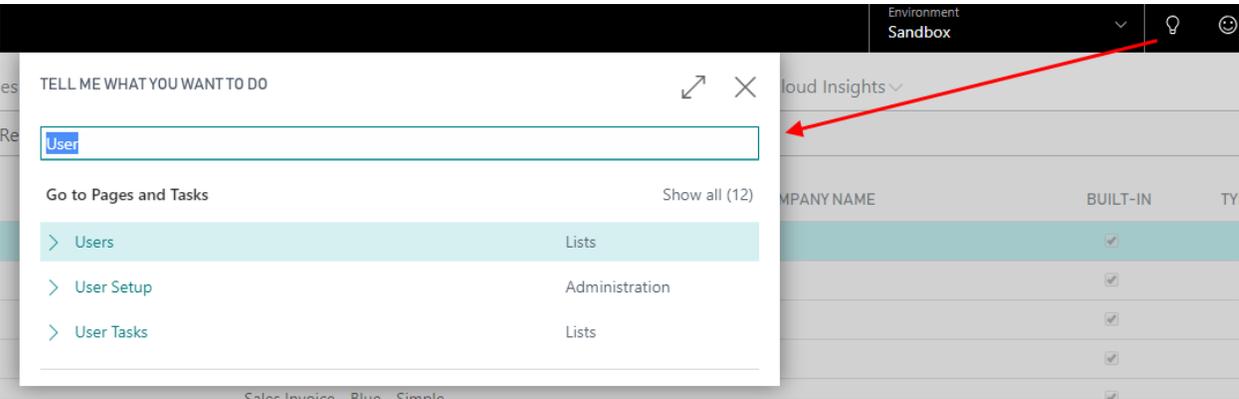
2) Drill into the user

Users

Search	+ New	Edit List	× Delete	Manage	Process	Open in Excel	Navigate	Less op

USER NAME	FULL NAME	STATE	WINDOWS USER NAME	LICENSE TYPE	AUTHEN
TESTUSER		Enabled		Full User	
DELEGATEDA...	Delegated Administrator	Enabled		Full User	
ESSENTIAL	Essential	Enabled		Full User	
EXTERNALACC...	External Accountant	Enabled		Full User	
INTERNALAD...	Internal Administrator	Enabled		Full User	
TEAMMEMBER	Team Member	Enabled		Full User	
PREMIUM	Premium	Enabled		Full User	

3) Go into the lookup in a new line and select the Easy Custom Field Extender permission set.

User Permission Sets   Manage

PERMISSION SET	DESCRIPTION	COMPANY
D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	
D365 EXTENSION MGT	Dynamics 365 Extension Mgt.	
LOCAL	Country/region-specific func.	
	...	

Look up value

QUICKBOOKSDESKTOPSYN	QuickBooks Desktop Synchroniza	_Exclude_QuickBooksDesktopSynchronization_
INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Intelligent Cloud Base
EASY CUSTOM FIELD EX	Easy Custom Field Extender	Easy Custom Field Extender
DYNAMICSGPD...	Select record "EASY CUSTOM FIELD EX" Data Migration	Dynamics GP Data Migration

Manage

Usage

The app can be accessed by searching for Easy Custom Field Extender:
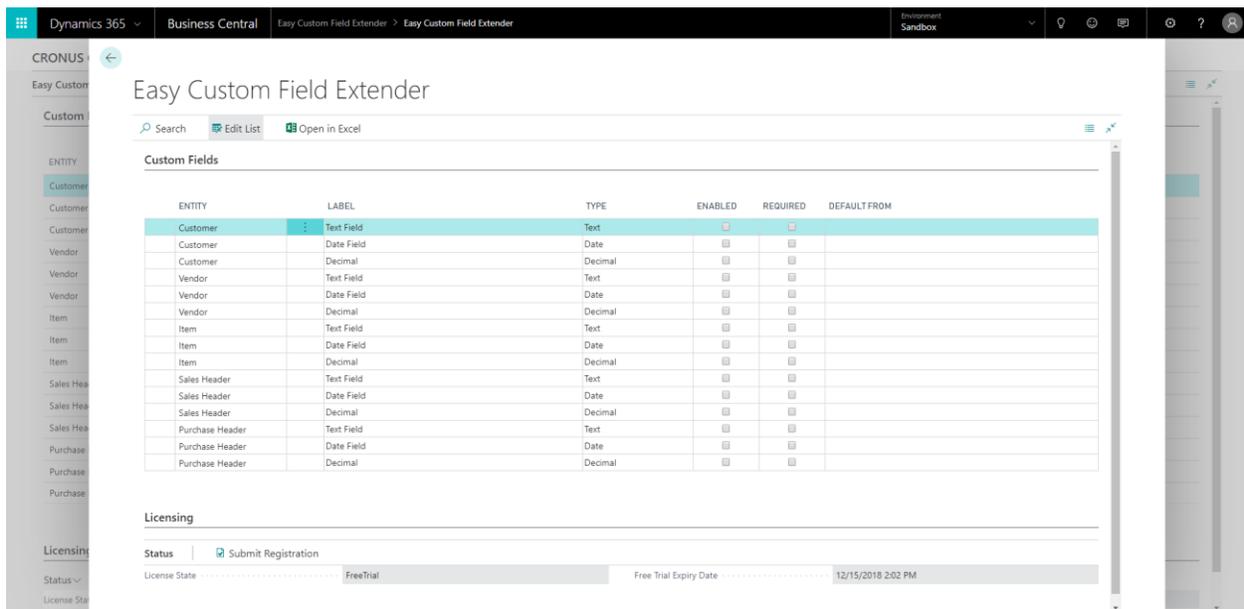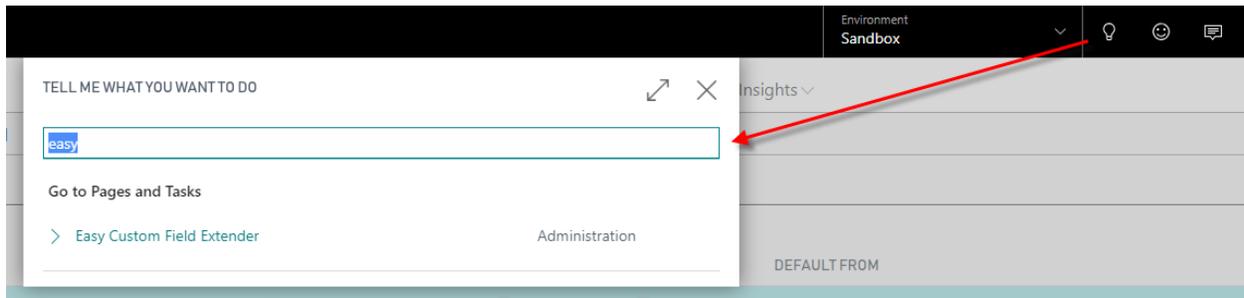
To have a custom field in an entity, the 'Enabled' field must be checked. When unchecking this field, related defaults will be unlinked unless the user declines the prompt.

The Entity column is for reference. The fields will show in the actual entity in the same order as in the list here.

Labels are the name of the field in the entity. The label text can be changed and must be unique per entity.

Easy Custom Field Extender

🔍 Search | 📝 Edit List | 📊 Open in Excel

Custom Fields

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer	Comment	Text	☑	☐	
Customer	Date Field	Date	☐	☐	
Customer	Decimal	Decimal	☐	☐	
Vendor	Text Field	Text	☐	☐	
Vendor	Date Field	Date	☐	☐	

✕ Your App: "Easy Custom Field Extender" Free Trial will soon expire.   Click Here

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10000 · Adatum Corporation

New Document   Request Approval   Customer | Actions   Navigate   Report   ⋯   ⓘ   ↙

General   Show less

No. · · · · · · · · ·	10000 · · ·	Document Sending P...		▼
Name · · · · · · · ·	Adatum Corporation	Total Sales · · · · · · · ·		**118,535.34**
IC Partner Code · · · · · ·	▼	Costs (LCY) · · · · · · · ·		60,974.21
Balance (LCY) · · · · · · ·	939.11	Profit (LCY) · · · · · · · ·		31,024.83
Balance Due (LCY) · · · · ·	0.00	Profit % · · · · · · · · ·		33.7
Credit Limit (LCY) · · · · ·	0.00	CFDI Purpose · · · · · · ·		▼
Blocked · · · · · · · · ·	▼	CFDI Relation · · · · · · ·		▼
Privacy Blocked · · · · · ·	◯	Last Date Modified · · · ·	12/10/2018	
Salesperson Code · · · · ·	PS ▼	Comment · · · · · · · · ·		

Type represents the data type of the field. When this is changed, the data in this field will be erased from all records and any defaults associated with it will be unlinked unless the user declines the prompt.

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer	Comment	Text	☑	☐	
Customer	Date Field	Date	☐	☐	
Customer	Date of Comment	Date	☑	☐	
Vendor	Text Field	Text	☐	☐	

CUSTOMER CARD

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New Document   Request Approval   Customer | Actions   Navigate   Report   ···   ⓘ   ⤢

General   Show less

No. · · · · · · · · · · ·	10000 ···	Document Sending P... ·	⌄
Name · · · · · · · · ·	Adatum Corporation	Total Sales · · · · · · · · · ·	**118,535.34**
IC Partner Code · · · · ·	⌄	Costs (LCY) · · · · · · · · · ·	60,974.21
Balance (LCY) · · · · · · · ·	939.11	Profit (LCY) · · · · · · · · ·	31,024.83
Balance Due (LCY) · · · · ·	0.00	Profit % · · · · · · · · · · ·	33.7
Credit Limit (LCY) · · · · ·	0.00	CFDI Purpose · · · · · · · ·	⌄
Blocked · · · · · · · · · · ·	▾	CFDI Relation · · · · · · · ·	⌄
Privacy Blocked · · · · · ·	◉	Last Date Modified · · · ·	12/10/2018
Salesperson Code · · · · ·	PS ⌄	Comment · · · · · · · · ·	
Responsibility Center · · ·	⌄	Date of Comment · · · · ·	📅

The required checkbox will cause a red asterisk to show next to the field when it is empty. Required fields in an entity that can be posted will not allow posting to go through until it is populated.

Custom Fields

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer	Comment	Text	☑	☐	
Customer	Date Field	Date	☐	☐	
Customer	Date of Comment	Date	☑	☐	
Vendor	Text Field	Text	☐	☐	
Vendor	Date Field	Date	☐	☐	
Vendor	Decimal	Decimal	☐	☐	
Item	Text Field	Text	☐	☐	
Item	Date Field	Date	☐	☐	
Item	Decimal	Decimal	☐	☐	
Sales Header	Customer Request	Text	☑	☑	
Sales Header	Date Field	Date	☐	☐	

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Process   Report   Posting   Request Approval | Actions   Navigate   Report   Less options

General   Show less

Customer No. · · · · · · · · · · · · · ·	10000 ⌄	Due Date · · · · · · · · · · · · · · · · ·	5/2/2018 🗓
Customer Name · · · · · · · · · · · · ·	Adatum Corporation ⌄	Requested Delivery Date · · · · · · ·	4/3/2018 🗓
SELL-TO		Promised Delivery Date · · · · · · · ·	🗓
Address · · · · · · · · · · · · · · · · · · ·	360 Main Street, Suite 1150	External Document No. · · · · · · · · ·	
Address 2 · · · · · · · · · · · · · · · · ·		Salesperson Code · · · · · · · · · · · ·	PS ⌄
City ·	Winnipeg ⌄	Campaign No. · · · · · · · · · · · · · · ·	⌄
Post Code · · · · · · · · · · · · · · · · ·	R3C 3Z3 ⌄	Opportunity No. · · · · · · · · · · · · ·	⌄
Country/Region Code · · · · · · · · · ·	CA ⌄	Responsibility Center · · · · · · · · · ·	⌄
Contact No. · · · · · · · · · · · · · · · ·	CT000001 ...	Assigned User ID · · · · · · · · · · · ·	⌄
Contact · · · · · · · · · · · · · · · · · · ·	Robert Townes ...	Status · · · · · · · · · · · · · · · · · · ·	Open
No. of Archived Versions · · · · · · · ·	0	WORK DESCRIPTION	
Document Date · · · · · · · · · · · · · ·	4/2/2018 🗓		
Posting Date · · · · · · · · · · · · · · · ·	4/2/2018 🗓		
Order Date · · · · · · · · · · · · · · · · ·	4/2/2018 🗓	Customer Request · · · · · · · · ✱	

The default from column let's the user make a one-way connection from a customer/vendor custom field to a sales/purchase custom field. When established between two enabled fields, whenever the user makes a document from a customer/vendor or manually sets them in a document, the data will copy from the custom field in the customer/vendor to the document's respective custom field. The default from field can only be set from the lookup (three dots button after clicking the field), typing in the box will give an error. The lookup will show the fields that can be used to default from, which will be customer or vendor fields with the same data type. Once a field is selected, the label of the field used to default from will show in the Default From column.

1) Click the default from field and click the 3 dots.

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer	Comment	Text	☑	☐	
Customer	Date Field	Date	☑	☐	
Customer	Date of Comment	Date	☑	☐	
Vendor	Text Field	Text	☐	☐	
Vendor	Date Field	Date	☐	☐	
Vendor	Decimal	Decimal	☐	☐	
Item	Text Field	Text	☐	☐	
Item	Date Field	Date	☐	☐	
Item	Decimal	Decimal	☐	☐	
Sales Header	Customer Request	Text	☑	☑	
Sales Header	Date of Comment	Date	☑	☐	...
Sales Header	Decimal	Decimal	☐	☐	
Purchase Header	Text Field	Text	☐	☐	

2) There are 2 customer fields with the same type available, click on the row and ok to save (or the customer entity on the row).
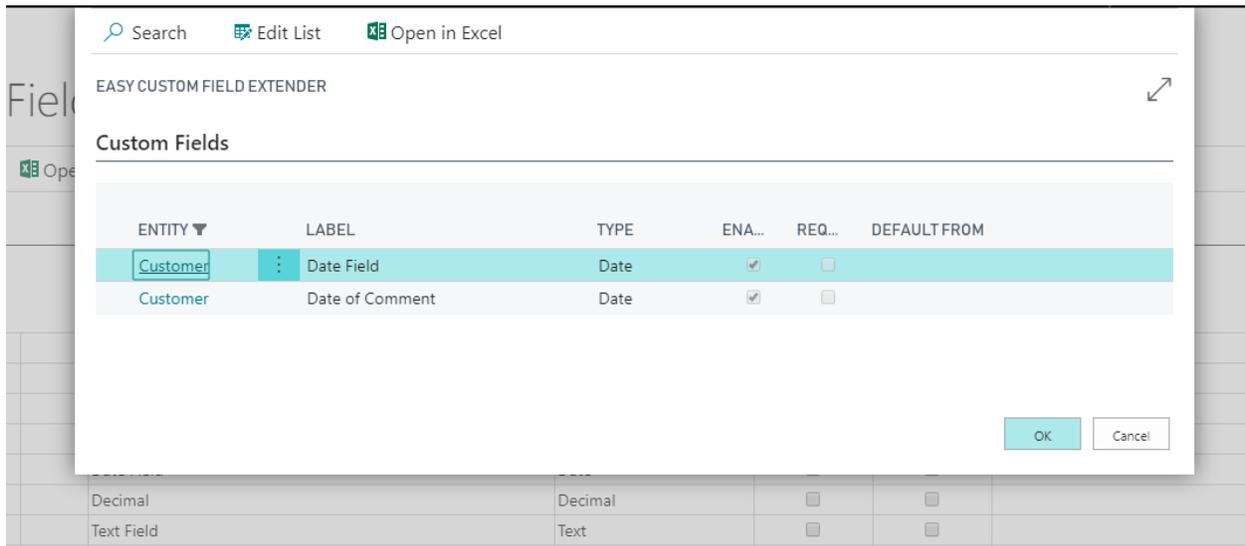
3) The default from column will update with the name of the field chosen.

4) Open a customer, enter data in the field we used as a default and make a sales order.

5) The field data copies over to the sales document.

The licensing section will display what kind of license you have and how long it is valid for. Once WebSan is contacted and a license is created for the user, the submit registration button can be used to activate the license immediately.

Licensing			
Status	☑ Submit Registration		
License State ·	FreeTrial	Free Trial Expiry Date · · · · · · · · · · · · · · · · · · ·	12/15/2018 2:02 PM

Contact accounting@websan.com or 416-499-1235, when you're ready to purchase our app.