Easy Custom Field Extender- User Guide

If you would like to purchase our app, scroll to the last page

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

			Environment Sandbox	~ Ç ©
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Re	User			
l	Go to Pages and Tasks	Show all (12)	MPANYNAME	BUILT-IN TY
	> Users	Lists		Ø
	> User Setup	Administration		Ø
	> User Tasks	Lists		Ø
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2) Drill into the user

Users

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USER NAME	FULL NAME		STATE	WINDOWS	USER NAME	LICENSE TYPE	AUTHEN
TESTUSER			Enabled			Full User	
DELEGATEDA	Delegated Administra	tor	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
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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	e_QuickBooksDesktopSynchronization_

			e	
	DYNAMICSGPD Select record "EASY C	CUSTOM FIELD EXEP Data Migration	Dynamics GP Data Migration	
	EASY CUSTOM FIELD EX	Easy Custom Field Extender	Easy Custom Field Extender	
lanage	INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Intelligent Cloud Base	

Usage

The app can be accessed by searching for Easy Custom Field Extender:

		Environment Sandbox V Q 😳 🗐
TELL ME WHAT YOU WANT TO DO	$ \ \ \ \ \ \ \ \ \ \ \ \ \$	insights \vee
easy		
Go to Pages and Tasks		
> Easy Custom Field Extender	Administration	
-		DEFAULT FROM

Custom I		ield Extender					≡ x ⁴	
ENTITY	Custom Fields						- /	
Customer							_	
Customer	ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM		
Customer	Customer	Text Field	Text					
	Customer	Date Field	Date					-
Vendor	Customer	Decimal	Decimal				_	
Vendor	Vendor	Text Field	Text					
Vendor	Vendor	Date Field	Date				_	
Item	Vendor	Decimal	Decimal					
	Item	Text Field	Text					-
Item	Item	Date Field	Date					
Item	Item	Decimal	Decimal				_	
Sales Hea	Sales Header	Text Field	Text					
Sales Hea	Sales Header	Date Field	Date					
Sales Hea-	Sales Header	Decimal	Decimal					-
Sales Hea	Purchase Header	Text Field	Text					
Purchase	Purchase Header	Date Field	Date					
Purchase	Purchase Header	Decimal	Decimal					
								_
Purchase								
	Licensing							

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

Edit Lis						
ΓY	LABEL	✓ TYPE	ENABLED	REQUIRED	DEFAULT FROM	
omer	Comment	Text				
omer	Date Field	Date				
omer	Decimal	Decimal		-		
or	Text Field	Text				
lor	Date Field	Date				
\leftarrow	10000 · Ac	atum Corpo	+ 🖻			
	New Document Re	quest Approval Customer	Actions 1	Navigate	Report	··· (i)
	General		1		Report	Show less
		quest Approval Customer	Actions I		Report	
	General		1	g P ·	Report	Show less
	General	10000	Document Sending	g P ·	Report	Show less
	General No Name	10000 Adatum Corporation	Document Sending	g P ·	Report	Show less 118,535.34
	General No Name IC Partner Code	10000 ···· Adatum Corporation	Document Sending Total Sales · · · · · · Costs (LCY) · · · · ·	g P ·	Report	Show less 118,535.34 60,974.21
	General No. Name IC Partner Code Balance (LCY)	10000 ···· Adatum Corporation 939.11	Document Sending Total Sales · · · · · · Costs (LCY) · · · · · · Profit (LCY) · · · · ·	g P ·	Report	Show less 118,535.34 60,974.21 31,024.83
	General No. Name IC Partner Code Balance (LCY)	10000 Adatum Corporation 939.11 0.00	Document Sending Total Sales · · · · · · Costs (LCY) · · · · · Profit (LCY) · · · · · ·	g P · [Report	Show less 118,535.34 60,974.21 31,024.83 33.7
	General No. Name IC Partner Code Balance (LCY) Credit Limit (LCY)	10000 ···· Adatum Corporation 939.11 0.00 0.00	Document Sending Total Sales · · · · · · Costs (LCY) · · · · · Profit (LCY) · · · · · Profit % · · · · · · · CFDI Purpose · · · ·	g P ·	Report	Show less 118,535.34 60,974.21 31,024.83 33.7

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			

10000 · Adatum Corporation

New Document	Request Approval	Customer	Actions Navigat	te Report … 🛈 🗸
General				Show less
No	10000		Document Sending P	~
Name · · · · · · · · · · · ·	Adatum Corporation		Total Sales	118,535.34
IC Partner Code · · · · ·		\sim	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 · · · · · · · · ·		T	CFDI Relation	~
Privacy Blocked			Last Date Modified	12/10/2018
Salesperson Code	PS	\sim	Comment	
Responsibility Center		\sim	Date of Comment	Ē

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	1	Customer Request	Text			
Sales Header		Date Field	Date			

SALES ORDER

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S-ORD101001 · Adatum Corporation

Process Report Posting	Request Approval Actions	Navigate Report Less option	าร
General			Show less
Customer No.	10000 ~	Due Date · · · · · · · · · · · · · · · · · · ·	5/2/2018
Customer Name	Adatum Corporation \checkmark	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 \checkmark	Campaign No.	~ ~
Post Code	R3C 3Z3 \checkmark	Opportunity No.	
Country/Region Code	CA \checkmark	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.

ENTITY		LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer		Comment	Text			
Customer		Date Field	Date	v		
Customer		Date of Comment	Date	v		
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	1	Date of Comment	Date			(···)
Sales Header		Decimal	Decimal			<u> </u>
Purchase Header		Text Field	Text			
· · · ·		N C P C	n ·	-	-	

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

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).

	🔎 Search 🛛 🐺	Edit List 🛛 🚺 Open i	n Excel				
Field	EASY CUSTOM FIELD	EXTENDER					27
	Custom Fields						
	ENTITY T	LABEL	TYPE	ENA	REQ	DEFAULT FROM	
	Customer	Date Field	Date				
	Customer	Date of Comment	Date				
							OK Cancel
	Decimal		Decimal				
	Text Field		Text				

3) The default from column will update with the name of the field chosen.

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		Date of Comment
Sales Header		Decimal	Decimal		
Purchase Header		Text Field	Text		
Purchase Header		Date Field	Date		
Purchase Header		Decimal	Decimal		

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

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New Document Re	equest Approval	Customer	Actions Naviga	te Report	··· (i)
遣 Sales Quote 🛛 🛍	Sales Invoice 🛛 🬘	Sales Order	🔓 Sales Credit Memo	Reminder	
No	10000		Total Sales		118,535.34
Name ·····	Adatum Corporation		Costs (LCY)		60,974.21
IC Partner Code · · · · · ·		\sim	Profit (LCY)		31,024.83
Balance (LCY)		939.11	Profit % · · · · · · · · · · · ·		33.7
Balance Due (LCY)		0.00	CFDI Purpose		\sim
Credit Limit (LCY)		0.00	CFDI Relation		~
Blocked · · · · · · · · · · · ·		•	Last Date Modified	12/10/2018	
Privacy Blocked			Comment · · · · · · · · ·		
Salesperson Code	PS	\sim	Date Field		
Responsibility Center		\sim	Date of Comment	12/10/2018	

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

SALES ORDER

CUSTOMER CARD

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Adatum Corporation

Process Report Posting	Request Approval Ac	tions N	avigate Report Less option	ns
General				Show les
Customer No.	10000	\sim	Due Date	5/9/2018
Customer Name	Adatum Corporation	\sim	Requested Delivery Date	
SELL-TO			Promised Delivery Date	
Address	360 Main Street, Suite 1150		External Document No.	
Address 2			Salesperson Code	PS v
City	Winnipeg	\sim	Campaign No. · · · · · · · · · · · · · · · · · · ·	V
Province	MB		Opportunity No.	~
Post Code	R3C 3Z3	\sim	Responsibility Center	v
Country/Region Code	CA	\sim	Assigned User ID · · · · · · · · · · · · · · · · · ·	~
Contact No.	CT000001		Status	Open
Contact · · · · · · · · · · · · · · · · · · ·	Robert Townes		WORK DESCRIPTION	
No. of Archived Versions		0		
Document Date · · · · · · · · · · · · · · · · · · ·	4/9/2018	Ē		
Posting Date	4/9/2018	Ē	Customer Request · · · · · · · *	
Order Date	4/9/2018		Date of Comment	12/10/2018

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.