



Compano Online Software

Manual User-defined Fields COS

File	COS_Manual_User-defined_Fields.docx
COS-version	L03
Revision & Date	1.0, 2-9-2022

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1 Introduction

This manual describes how to create and manage user-defined fields within Compano Online Software.

1.1 Concepts

User-defined field (UDF)	A <i>User-defined field</i> (UDF) is an 'extra' data field that can be added to most Entities in the Compano software. A user-defined field is mostly used to add information for which there is no standard Compano data field.
Entity	A data object, for instance Product, Item, Project, Price, etc.
Dedicated application	Compano Online Software application which is not shared with other customers, which will allow customer-specific implementation of UDFs, multiple classifications systems, etc.

1.2 Dedicated application

User-defined fields are only available with a *dedicated* application. Should you wish to use user-defined fields, please contact Compano Sales, sales@compano.com to discuss the available options.

1.3 Example

The example in this guide assumes the creation of user-defined fields on the Product entity. User-defined fields can of course also be created on other entities, such as Item, Assortment, etc.

Notes:

- **User-defined fields** are shown on the *User-defined fields* tab (see below) of individual items.
- User-defined fields can be **grouped** in *Field chapters*.
- The **order** in which user-defined fields appear on the user-defined fields tab can be manipulated.
- Subsets of user-defined fields can be collected onto a free form tab.

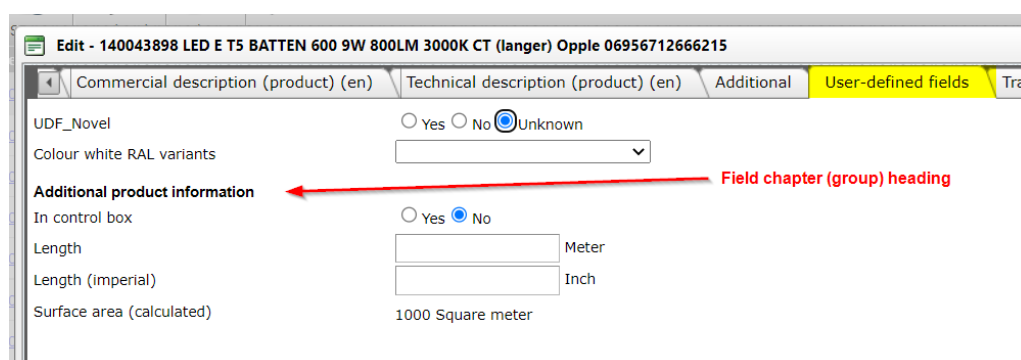
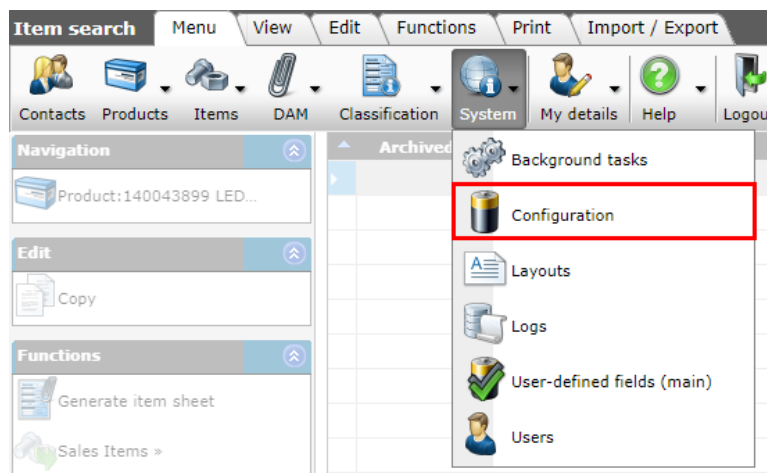


Figure 1. The user-defined fields tab

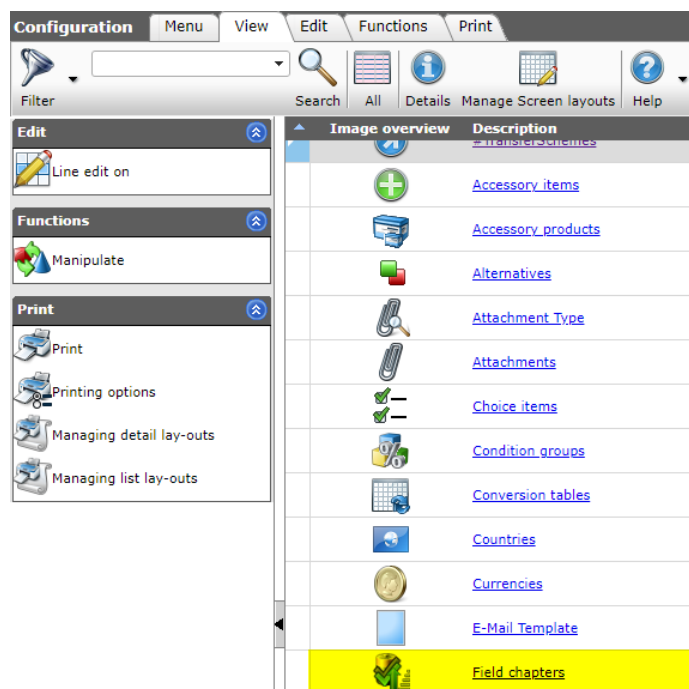
2 Field chapters [optional]

Should you need to group user-defined fields, you first need to create *Field Chapters*.

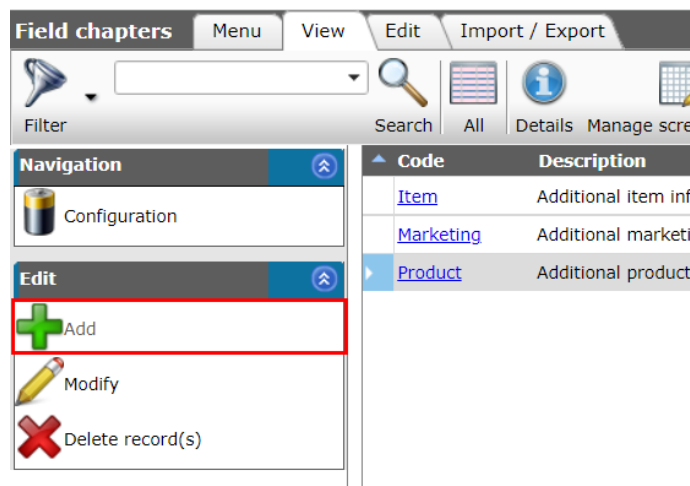
1. Through the Menu go to *System > Configuration*.



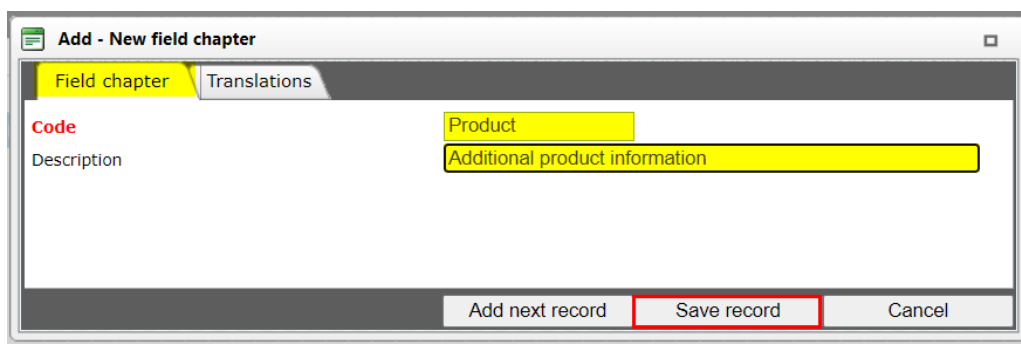
2. Click on *Field chapters*.



3. Under Edit, click on *+Add*.



4. In the pop-up window:



- a. **Code:** A short-hand code for the chapter.
 - b. **Description:** A description for the chapter. This text will also show as the chapter title on the User-defined fields tab.
 - c. **Translations:** Optionally, fill out the translations for this field chapter on the Translations tab.
5. Save the record.

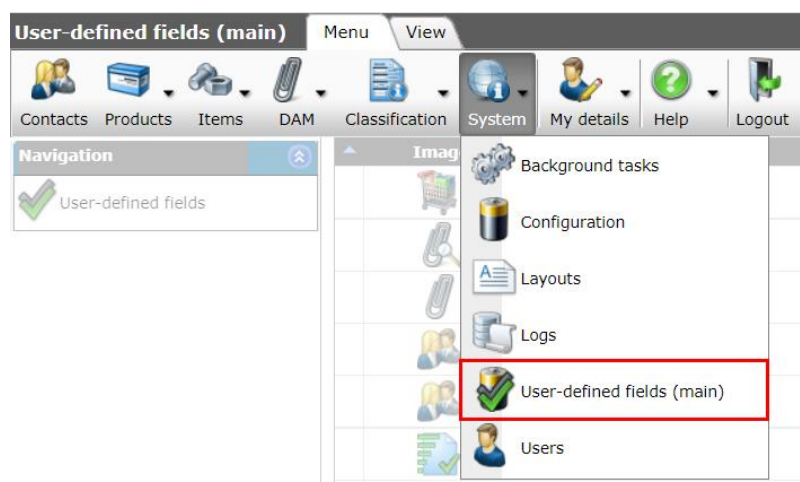
Note: When using Field chapters, it is best to assign all UDFs to a field chapter as any unassigned UDFs will show at the top of the UDF tab.

2.1 Assigning field chapters

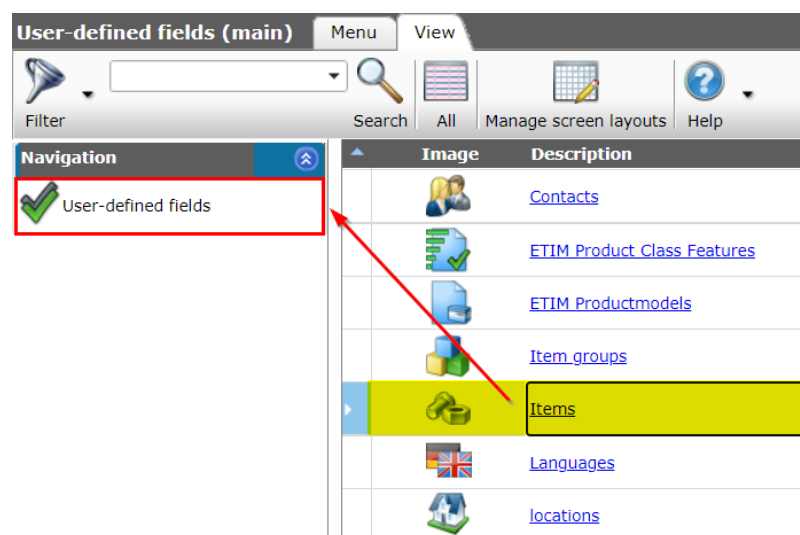
A field chapters can be assigned to an UDF during (or after) creation of the UDF:

To assign a field chapter:

1. Through the Menu, go to System User-defined fields (main):



2. Select an entity and, under Navigation, click on *User-defined fields*.



3. Either Add a new UDF(see chapter [3. Creating user-defined fields](#)) or Edit an existing UDF and in the pop-up window:

Edit - Colour white RAL variants

User def field Tooltip (en) Memo Translations

Name: UDF_Colour_White

Normalized name: UDF_Colour_White

Sequence: 5

Type: Single choice

Label: Colour white RAL variants ☐ Automatic

Header: White RAL ☐ Automatic

Field chapter (highlighted in yellow):

- Assortment: Additional assortment information
- Item: Additional item information
- Marketing: Additional marketing information
- Product: Additional product information

▼ There are 4 Field groups found

Style: Parent field, Suffix, Unit

Special: Default value, Required, In quick filter, Summable, Is copy allowed, Mobile interface, ShowMembers

Buttons: Edit the previous one, Edit the next one, Check expression, **Save record** (highlighted in red), Cancel

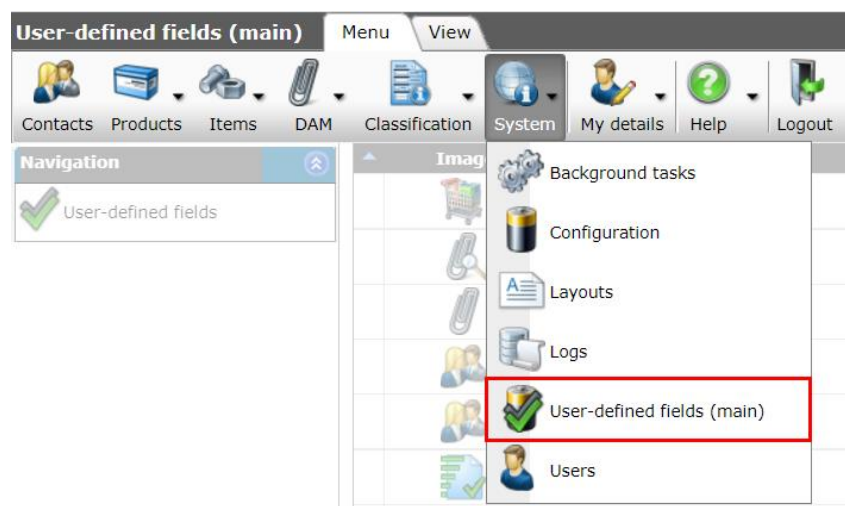
- a. **Field chapter:** Select one of the field chapters.
4. Save the record.

2.1.1 Manipulating field chapters

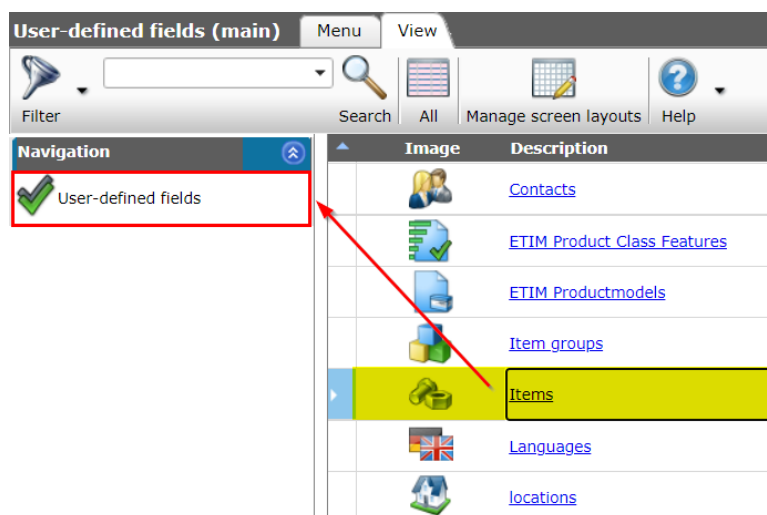
When using many field chapters, assigning field chapters to UDFs can also be accomplished through *Manipulation*.

To manipulate field chapters:

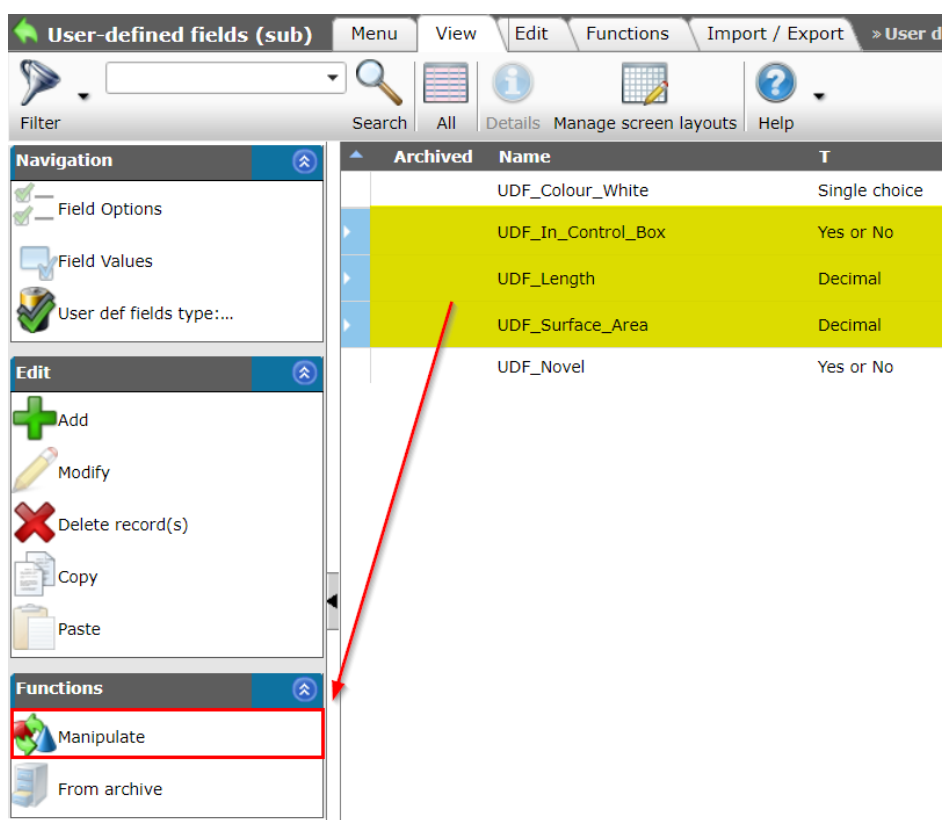
1. Through the Menu, go to *System > User-defined fields (main)*.



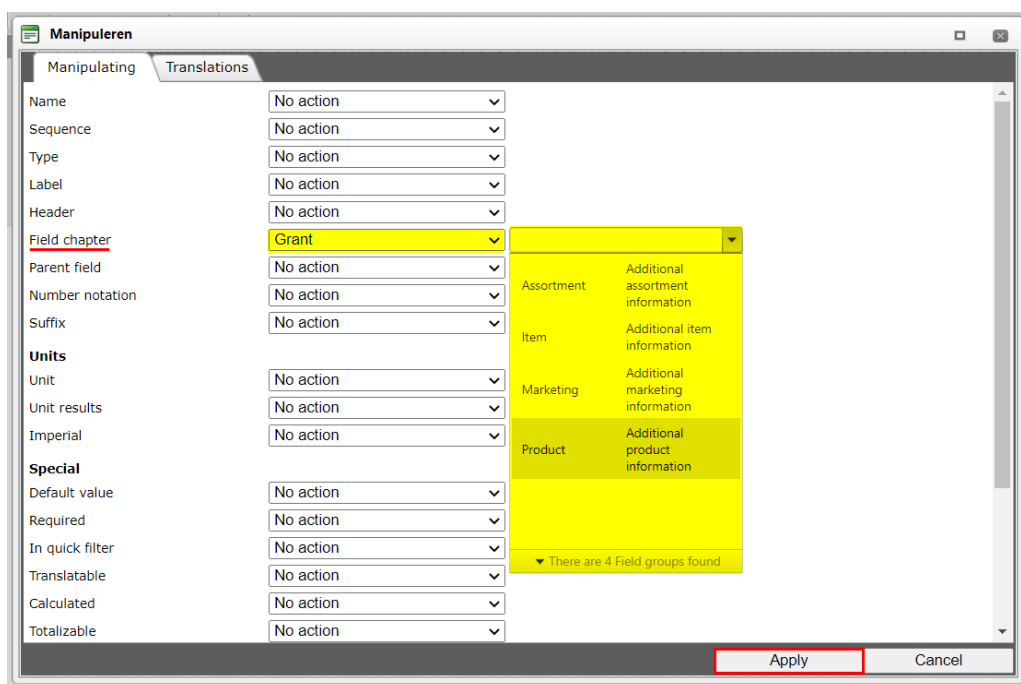
2. Select the entity and, under Navigation, click on *User-defined fields*.



3. In the Overview, select a number of user-defined fields that need to get assigned to the same field chapter and, under Functions, click on *Manipulate*.



4. In the pop-up window:



Property	Value
Name	No action
Sequence	No action
Type	No action
Label	No action
Header	No action
Field chapter	Grant
Parent field	No action
Number notation	No action
Suffix	No action
Units	
Unit	No action
Unit results	No action
Imperial	No action
Special	
Default value	No action
Required	No action
In quick filter	No action
Translatable	No action
Calculated	No action
Totalizable	No action

▼ There are 4 Field groups found

Assortment: Additional assortment information

Item: Additional item information

Marketing: Additional marketing information

Product: Additional product information

Apply Cancel

- a. Field chapter: Select Grant from the drop-down menu. A second drop-down menu appears from which you can select the correct field chapter.
5. Click on *Apply*.

3 Creating user-defined fields

Several different **types** of user-defined fields are available for use. Depending on the Type of field, its creation consists of one or two steps:

1. Create the user-defined field;
2. Create the **Field Options** (only for the types *Single Choice*, *Multiple Choice*, and *Selection List*).

3.1 Entities suitable for user-defined fields

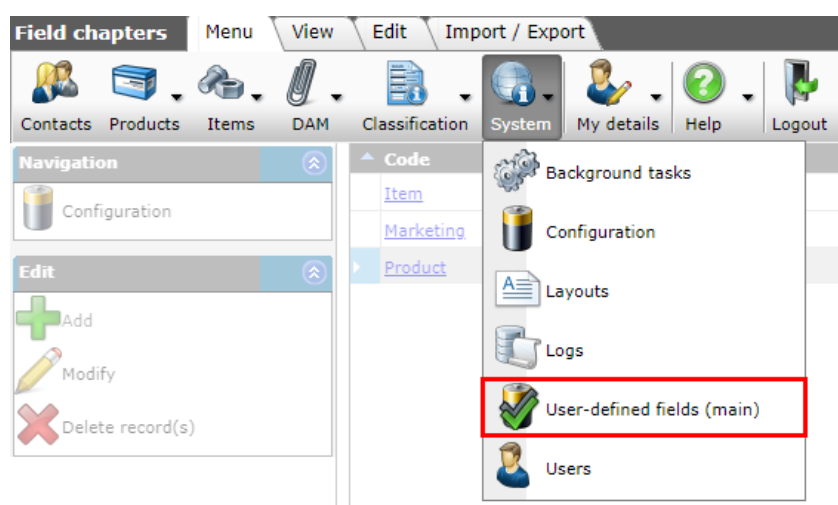
Not all entities within Compano allow for the use of user-defined fields. Suitable entities are:

Entity	UDF Types allowed
Accessory products	All
Assortment	All
Attachments	All
Attachment types	All
Cost Type	GUID
Item Groups	All
Items	All
Manufacturers	All
Product Class Features	All
Product Groups	All
Product Models	All
Products	All
Projects	GUID
Project Monitoring / Dimensions	GUID
Project Specific Materials	GUID
Publication Nodes	All
Publication Links	All
Purchase Contracts	All
Rates	GUID
Recipe Lines	All
Suppliers	All
Transfer Lines	All
Work Type	GUID

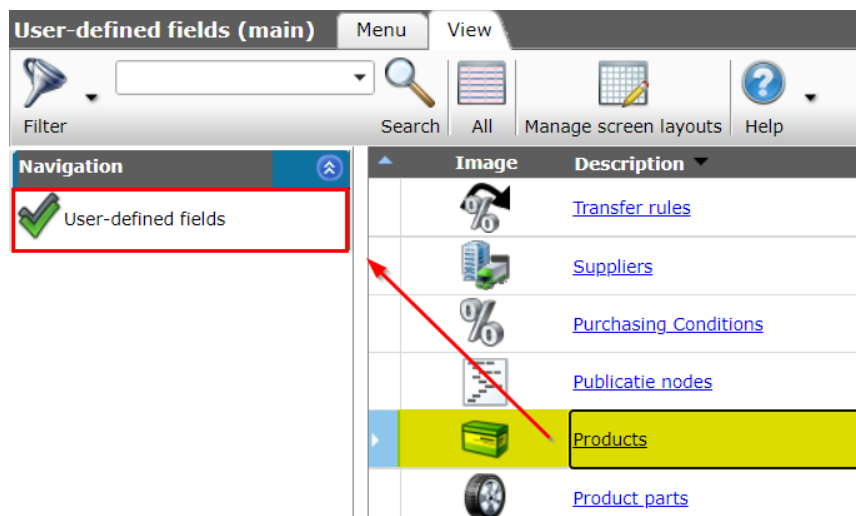
3.2 Adding a user-defined field

To add a user-defined field:

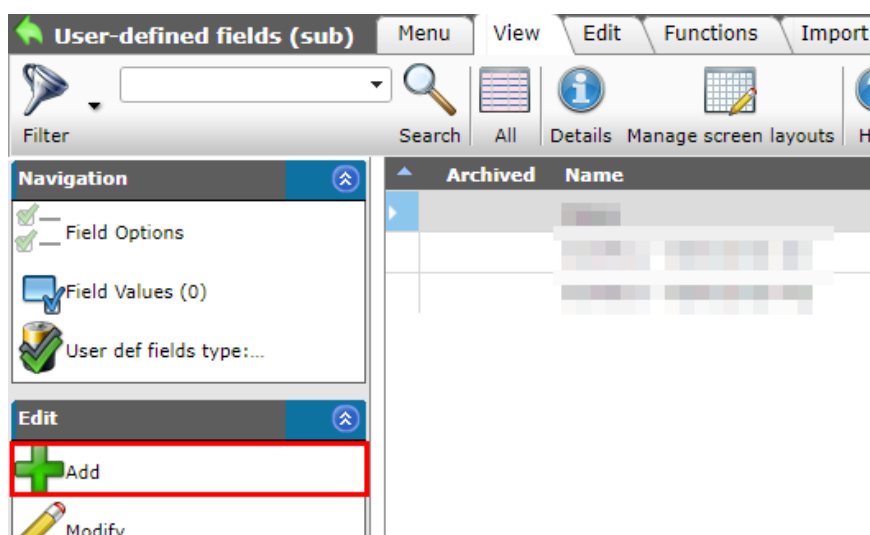
1. Through the Menu, go to *System > User-defined fields (main)*:



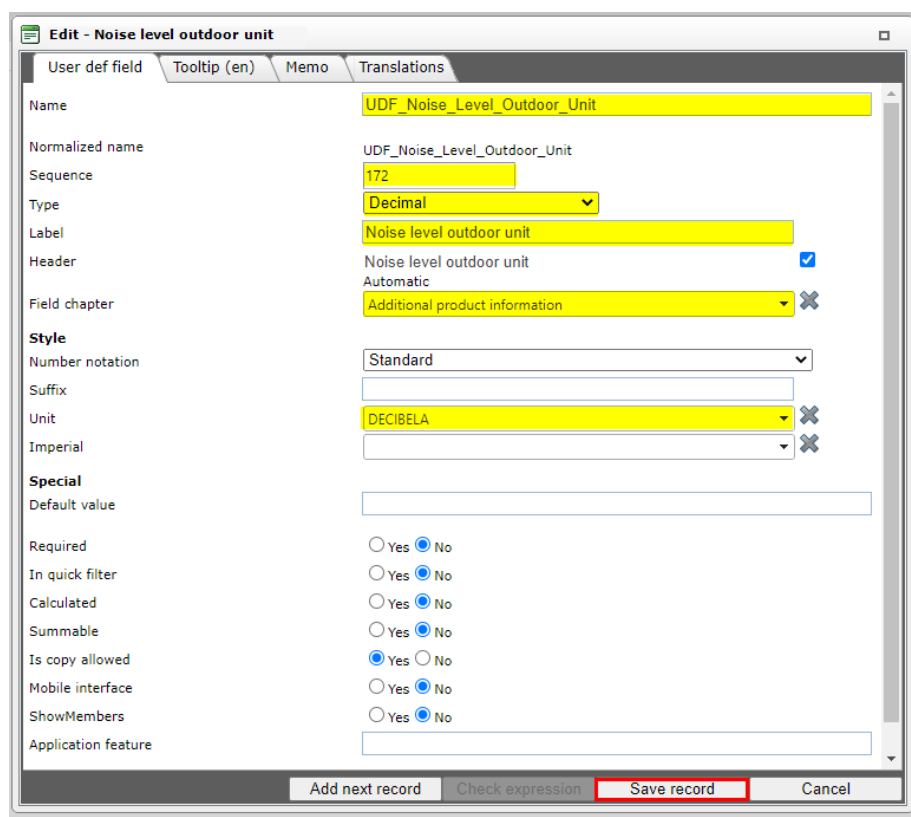
2. Select the Entity where you need to add a user-defined field, and click on *User-defined fields* under Navigation. Alternatively, click directly on the linked Entity:



3. On the next screen, click on *+Add* to add a user-defined field.



3. In the pop-up windows:



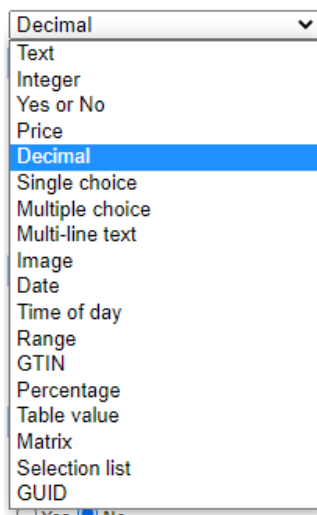
- a. **Name:** Type a name for the user-defined field.

Tip: Use the prefix UDF_ to easily distinguish the user-defined field from system fields and use underscores instead of spaces to prevent problems when using UDFs in data feeds, for example: **UDF_Noise_Level_Outdoor_Unit**

- b. **Sequence:** Use a number to indicate in which order the user-defined field should be visible on the User-defined fields tab.
- c. **Type:** Choose the type of user-defined field you need to use.

Important: If you later need to link the user-defined field to an ETIM-feature, the type of the field **must match** with the data type of the ETIM-feature.

See also [Appendix A: Types of user-defined fields](#) for an explanation of the different types of fields and their options:



- d. **Label:** Enter a name for the label. The label will show on the tab User-defined fields.
Note: You may use spaces and/or punctuation in the name for the label.
- e. **Header:** Enter a name for the header that will be given to the user-defined field when added to a screen layout. Note: You may use spaces and/or punctuation in the name for the header.
- f. **Field chapter (optional):** Select the field chapter under which you want to sort the user-defined field.

Depending on the Type of user-defined field, one or more options can be set or checked. These options can be found under the headings **Style** and **Special** and will be discussed in the next paragraphs.

3.3 Field-specific settings

For certain user-defined fields a Style and Special options are available:

- **Style:** Text or number formats and units of measurement
- **Special:** Miscellaneous options, which differ per type of field

3.3.1 Style

The following types of user-defined fields have **Style** options:

Field Type	Max length	Number notation	Suffix	Parent field	Unit	Imperial unit	Unit results
Text	X	-	-	-	-	-	-
Integer	-	-	X	-	-	-	-
Decimal	-	X	X	-	X	X	-
Single choice	-	-	X	X	X	-	-
Multiple choice	-	-	X	X	X	-	-
Multi-line text	X	-	-	-	-	-	-
Range	-	-	X	-	X	X	-
Table value	-	X	X	-	X	-	-
Matrix	-	-	X	-	X	-	X

Max length

The *Max length* option is used to set the maximum number of characters that can be entered into a UDF of type Text and Multi-line text.

Number notation

The options for *Number notation* indicate how the decimal number should be entered / displayed:

- Standard
- No decimal place (0)
- 1 Decimal (0.0)
- 2 Decimals (0.00)
- Three decimal places (0.000)
- Four decimal places (0.0000)

Parent field

Selection lists (*Single choice* and *Multiple choice*) can be nested, where a choice at one level determines which choices are available on a next (sub)level. Use the Parent field option to indicate on which parent field this user-defined field is dependent.

Example:

Options for COLOUR (parent)	Options for COLOUR_DETAIL (child)
White	
Grey	Light grey
	Dark grey
Black	
RAL code	9001
	9002
	9003
	9004
	9005

For more details on nested selection lists, see [Appendix B: Nested single choice](#) lists. Appendix B:

Suffix

A suffix can be used in combination with a Unit.

Unit

Select a *Unit* from the standard units of measurement which are available in the system. Non-standard units can be added manually, through *Menu > Configuration > Units*. Units are, for example, length in centimetres, weight in grams, etc.).

Imperial unit

Select a Unit of the Imperial system, for example, pounds, gallons, square feet, etc. Note: This is an optional feature.

Unit results

For the user-defined field type Matrix, the type of *Unit result* must be specified. A matrix is used to record, for example, data points of a graph, or 3-dimensional coordinates. *Unit* and *Unit result* then indicate the unit of the X-, Y- and (optionally) Z-axis.

Style

Suffix

Unit
CMT Centimeter

Unit results
MTR Meter

3.3.2 Special

Under the heading *Special*/you will find several *optional settings* for the user-defined field:

Special

Default value

Required ☐ Yes ☒ No

In quick filter ☐ Yes ☒ No

translatable ☐ Yes ☒ No

Calculated ☐ Yes ☒ No

HTML ☐ Yes ☒ No

Sommable ☐ Yes ☒ No

Copy Along ☒ Yes ☐ No

Mobile interface ☐ Yes ☒ No

Application Feature

Save Cancel

Not every field has the same options. Below you will find a matrix with the options per field:

Field Type	Default value	Required	In quick filter	Translatable	Calculated	HTML	Summable	Is copy allowed	Mobile interface	Show Members	Application feature
Text	X	X	X	X	X	-	-	X	X	X	X
Integer	X	X	X	-	X	-	X	X	X	X	X
Yes or No	X	X	X	-	-	-	X	X	X	X	X
Price	X	X	X	-	X	-	X	X	X	X	X
Decimal	X	X	X	-	X	-	X	X	X	X	X
Single choice	X	X	X	-	-	X?	X	X	X	X	X
Multiple choice	X	X	X	-	-	X?	-	X	X	X	X
Multi-line text	X	X	X	X	X	X?	X	X	X	X	X
Image	X	X	X	-	-	X	X	X	X	X	X
Date	X	X	X	-	-	-	X	X	X	X	X
Time of day	X	X	X	-	-	-	X	X	X	X	X
Range	X	X	X	-	-	-	X	X	X	X	X
GTIN	X	X	X	-	-	-	X	X	X	X	X
Percentage	X	X	X	-	X	-	X	X	X	X	X
Table value	X	X	X	-	-	X	X	X	X	X	X
Matrix	X	X	X	-	-	X	X	X	X	X	X
Selection list	X	X	X	-	-	X	X	X	X	X	X
GUID	X	X	X	-	-	-	X	X?	X	X?	X

- **Default value:** Optionally enter a default value for the field; if no value is entered for the field, the default value is used.
- **Required** (Yes/No): Indicate whether this is a required field.
- **In quick filter** (Yes/No): Indicate whether this field should be a filter option in the Quick Filter.
- **Translatable** (Yes/No): When set to Yes, the field will be available on the Translations tab:

- **Calculated** (Yes/No): Setting this option to Yes adds an **Expression** tab to the pop-up window. Use this tab to enter a mathematical or other expression, to calculate the value of this field. Expressions can make use of other Compagno database fields and/or specific functions such as CONCAT, IF, etc. For more information on Expressions, see the *Manual Expressions*.

- **HTML** (Yes/No): Set to Yes to indicate whether HTML-code in a text field should be translated to the correct formatting, for example the HTML-expression `<strong>bold</strong>` translates to **bold**. This option is often used in combination with a (calculated) text field:

- **Summable** (Yes/No): This option applies to fields of the type *Price*. Set this option to Yes if in a Quotation or Estimate the UDF should be included in calculations of Totals or Subtotals.

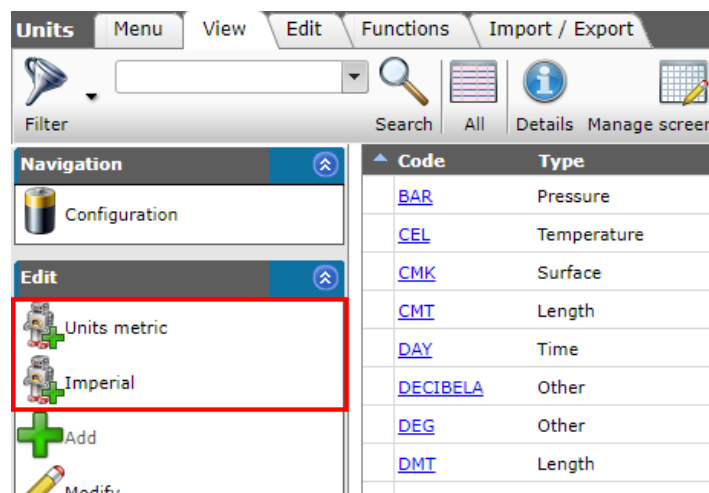
- **Is copy allowed** (Yes/No): Set to Yes if the value of the UDF should be copied through when copying the Entity. For example: When copying a quotation with UDFs, then the values of these UDFs are copied through into the newly created quotation.
Note: When set to No the value of the UDF of the copied Entity is left blank or filled out with the set default value.
- **Mobile interface** (Yes/No): Set to Yes if the UDF should show in Compano's mobile (web)interface.
- **Show members** (Yes/No): Set to Yes if the UDF should also show in any underlying¹ COS-environments. For example, when information on a product in the main environment is transferred to an underlying sub-environment, the UDF information is also transferred.
- **Application feature** : Use this option for filtering of data by third party applications. For example, a web shop could use the value in this field to filter products based on customer role: 'C' for Consumer and 'I' for Installation Technician.

3.4 Units

For user-defined fields of the type *Integer*, *Decimal* and *Range*, a **unit** can be selected (millimetre, kilo, kilowatt-hour, etc.).

3.4.1 Default units

Available default Units are listed under *Menu > System > Configuration > Units*. Any missing units can be added using either the *+Units metric* or *+Units Imperial* button:



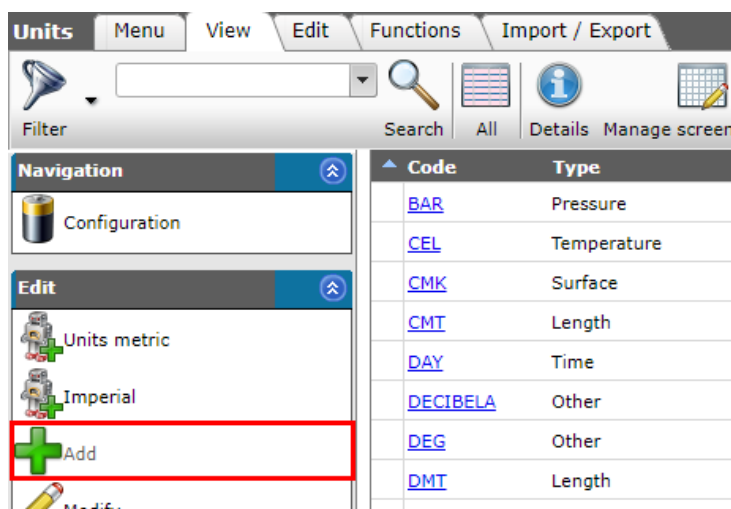
Note: Only the most commonly used metric or imperial units will be added this way.

Adding less common units

Less common units can be added using the *+Add* button:

1. Through the Menu, go to *Configuration > Units*.
2. Click, under Navigation, on *+Add* to add a less common unit:

¹ COS-environments can be nested, with a main 'mother' environment and underlying 'daughter' and 'granddaughter' environments.



3. In the pop-up window:

Add - New unit

Unit | Translations

Type: Other

System: Metric

Code: YIELD

Abbreviation: Yield

Description: Solar panel yield per surface area

Plural description: Solar panel yield per surface area

ICS Unit: Watt per square metre

Factors

Factor: 10.7639104000000000

Add next record | **Save record** | Cancel

- Type:** Select a type of Unit, for instance Time, Length, Weight or Other.
 - System:** Select a measurement system, Metric or Imperial.
 - Code:** Type a code for the Unit. The Unit Code may consist of letters and/or numerals.
 - Abbreviation:** Type an abbreviation for the Unit.
 - Description:** Type a description for the Unit (single).
 - Plural description:** Type description for the Unit (plural).
 - ICS Unit:** Select the correct unit from the ICS-system.
4. Save the record.

3.4.2 Metric/Imperial units²

For the user-defined field types *Decimal* and *Range*, an optional **Imperial Unit** can be selected to convert the field value to a **Imperial System** measurement. Conversion of values is done automatically by default, but can be disabled to allow for manual conversion of values.

² The option Metric/Imperial units is **not available by default**; if needed please request this option by contacting sales@compano.com.

To use Imperial units, simply select a unit value for both the Metric and Imperial unit of the UDF:

Conversion from metric to imperial values and vice-versa is 'automatic'. For instance:

Bore	30.00	Millimeter
Bore (imperial)	1.18	Inch ☒ Automatic

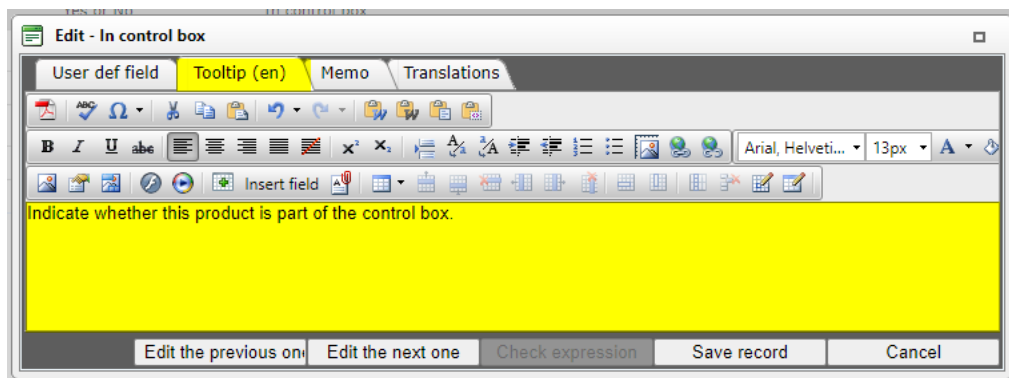
Unchecking the *Automatic* tick box will allow you to set a different value:

Bore	30.00	Millimeter	☐ Automatic
Bore (imperial)	1.20	Inch	☐ Automatic

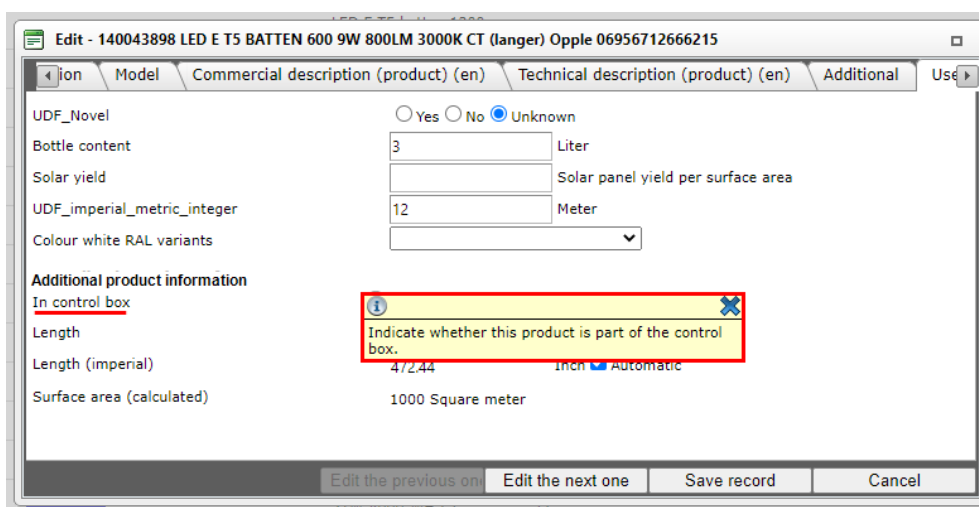
Note: Conversion factors are managed for each unit, under *System > Configuration > Unit*.

3.5 Tooltip

On the tab *Tooltip* a description/explanation of the user-defined field can be entered:

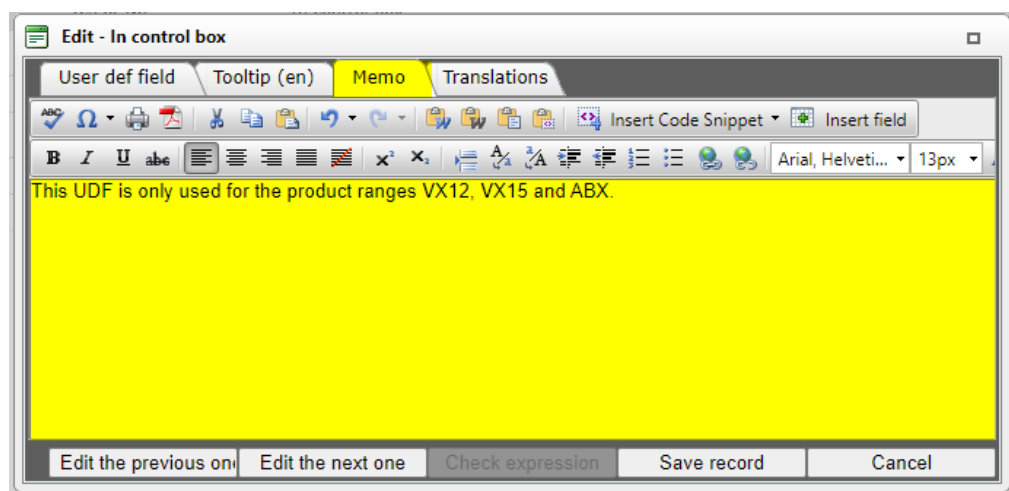


This tooltip will show next to the user-defined field on the user-defined fields tab of the Entity when the  -icon is clicked:



3.6 Memo

The *Memo*-tab can be used to enter a note for internal use, for instance:





3.7 Translations

Translations can be entered on the Translations-tab for the fields:

- Header
- Label
- Suffix
- Tooltip

Automatic fallback

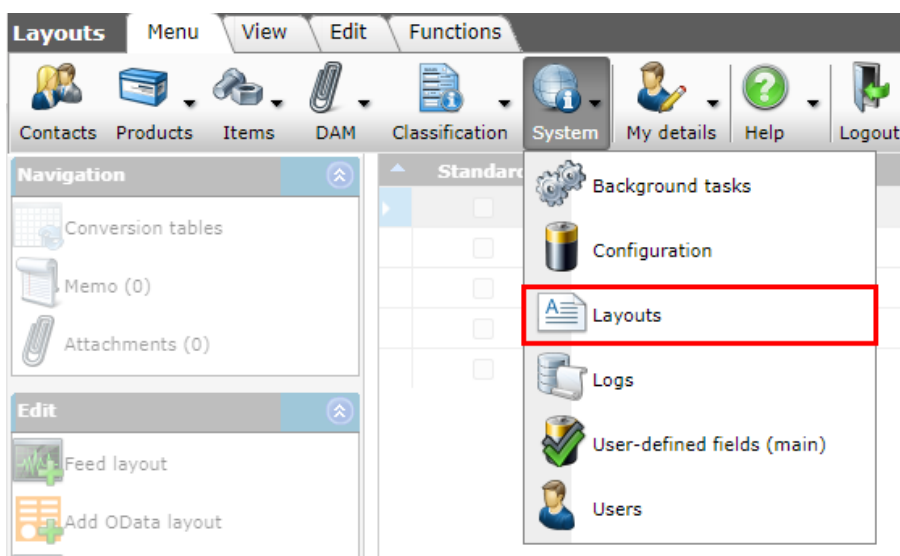
The option *Automatic* can be used to direct the fallback of values/translations. In the example above:

1. The value of *Header* falls back to the value entered at *Label*.
2. The values of *Header*, *Label*, *Suffix* and *Tooltip* all fall back to the values entered at their Dutch counterparts.
3. The values of *Header*, *Label*, *Suffix* and *Tooltip* have been entered as English translations and do **not** fall back.

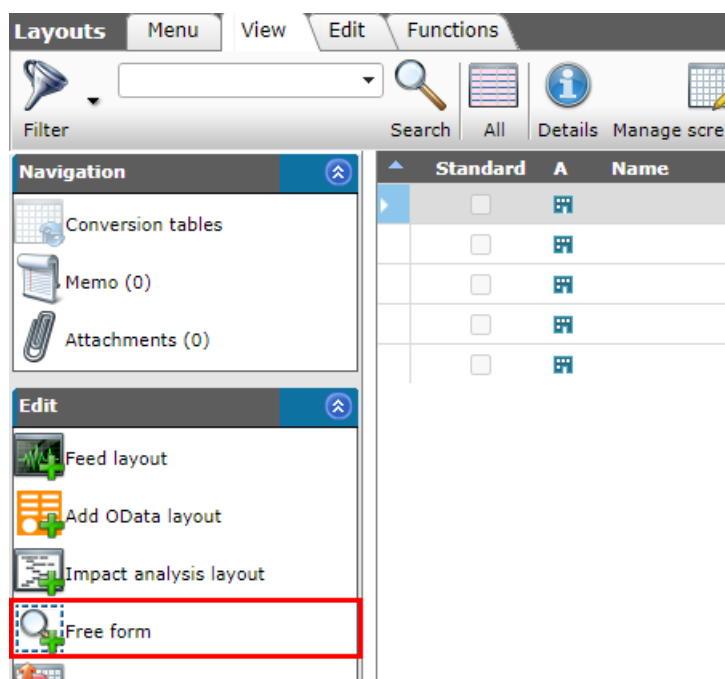
4 Collection tab

Subsets of user-defined fields can be collected on one or more collection tabs. Collection tabs need to be defined per Entity:

1. Through the Menu, go to *System > Layouts*.



2. Under Edit, click on *+Free Form*.



3. In the pop-up window:

Layout tab

The screenshot shows the 'Add - New layout' window with the 'Layout' tab selected. The 'Type' is set to 'Free form'. The 'Name' field contains 'Technical specification'. The 'Application' is set to 'Within the company' (indicated by a radio button). At the bottom, there are buttons for 'Add next record', 'Save record', and 'Cancel'.

- Name:** Enter a name for the Collection tab.
 - Application:** Set to Within the company.
4. Next, go to the Fields tab and select which user-defined fields are to be shown in this Collection:

Fields tab

The screenshot shows the 'Add - New layout' window with the 'Fields' tab selected. On the left, under 'Available fields', there is a tree view with 'User-defined fields' expanded, showing 'Bottle content', 'Colour white RAL variants', 'In control box', 'Length', 'Length (imperial)', 'Solar yield', and 'Surface area (calculated)'. A red arrow points from 'In control box' to the 'Selected fields' table on the right. The 'Selected fields' table has two columns: 'Field' and 'Header'. The table contains the following data:

Field	Header
Length	Length
Length (imperial)	Length (imperial)
In control box	Control Box

At the bottom, there are buttons for 'Add next record', 'Save record' (highlighted with a red box), and 'Cancel'.

- Available fields:** Select user-defined fields from the correct category and move them to the Selected Fields column with the ➤-button.
5. Save the record.

The Collection Tab will show as the first tab in the View/Edit window of the Entity for which is was created, for instance on Product:

Edit - 140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT (langer) Oppl 069567126662...

Technical specification | Product | Classification | Model | Commercial description

Length: 12.00 Meter

Length (imperial): 472.44 Inch ☒ Automatic

In control box: ☐ Yes ☒ No

Edit the previous one | Edit the next one | Save record | Cancel

4.1 Multiple collections

Multiple collections of user-defined fields can be made by adding more Free From layouts for the same entity. Collections can be selected through a drop-down menu on the Collection Tab:

Oppl 140043898 06956712666215 LED E T5

Edit - 140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT (langer) Oppl 06956712666215

Technical specification | Product | Classification | Model | Commercial description (product) (en) | Technical description (pr)

Show fields

Length

Length (imperial): 472.44 Inch ☒ Automatic

In control box: ☐ Yes ☒ No

Technical specification

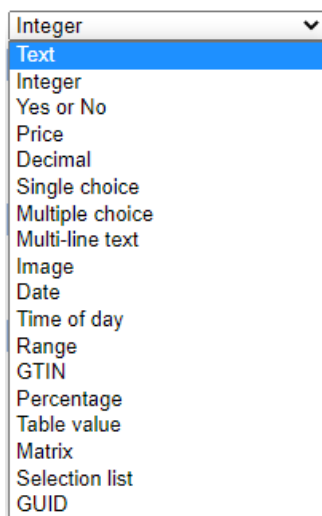
Technical specification

Colour

Edit the previous one | Edit the next one | Save record | Cancel

5 Appendix A: Types of user-defined fields

When creating user-defined fields, the following types of field can be selected:



5.1 Text

Use: The Text UDF can be used for unformatted text values.

Data types allowed: 256 alpha-numeric characters

5.1.1 Max length

The default length of a user-defined field of type *Text* is 256 characters. By entering a value for Max Length, the number of characters can be expanded.

5.1.2 Calculated: Combining texts

The user-defined field of type *Text* can be used to combine multiple text values into one long text:

1. Create a new UDF of type *Text* and set the option *Calculated* to Yes; a new tab Expression will appear:

2. On the Expression tab, create a formula using the CONCAT function to combine texts, for instance:

3. The resulting text value for a record will be:

CONCAT function

Concatenate (combine) two or more text strings.

Syntax

`CONCAT(string1, string2, etc)`

Parameters

String# Data fields; must be a text (string) field, or a manually entered text enclosed in double quotes

Example

Display in which Assortment the Item is present:

```
CONCAT([ItemRecord.Description/]," is in assortment
",[ItemRecord.ItemSetDescription/]) → "Brass Fitting F12 is in
assortment VHX Netherlands"
```

5.2 Yes or No

Use: The Yes or No UDF can be used for Logical data.

Data types allowed: 0, 1, Yes, No, Ja, Nee, Nein, Y, N, J, <empty>

The Yes or No data field can be left unspecified (empty) on import. This will result in an ETIM value of Unknown.

5.3 Price

Use: The Price UDF is used for any type of price; gross price, net price, etc.

Data types allowed: Numeric (currency)

Wijzigen

Yes or No In control box

User def field Tooltip (en) Memo Translations

Name

Sequence

Type **Price**

Label

Header

Field chapter

Style

Suffix

Special

Default value

Required ☐ Yes ☒ No

In quick filter ☐ Yes ☒ No

Calculated ☐ Yes ☒ No

Summable ☐ Yes ☒ No

Is copy allowed ☒ Yes ☐ No

Mobile interface ☐ Yes ☒ No

ShowMembers ☐ Yes ☒ No

Application feature

Add next record Check expression Save record Cancel

5.4 Decimal

Use: The Decimal UDF can be used for any decimal number.

Data types allowed: Numeric (decimal)

Note: The decimal UDF can be used with metric and imperial units.

Wijzigen

Yes or No In control box

User def field Tooltip (en) Memo Translations

Name **UDF_Decimal**

Normalized name **UDF_Decimal**

Sequence

Type **Decimal**

Label

Header

Field chapter

Style

Number notation **Standard**

Suffix

Unit **MTR Meter**

Imperial **FOT Foot**

Special

Default value

Required ☐ Yes ☒ No

In quick filter ☐ Yes ☒ No

Calculated ☐ Yes ☒ No

Summable ☐ Yes ☒ No

Is copy allowed ☒ Yes ☐ No

Mobile interface ☐ Yes ☒ No

ShowMembers ☐ Yes ☒ No

Application feature

Add next record Check expression Save record Cancel



5.5 Single choice

Use: The Single choice UDF can be used to create a single choice drop-down list.

Data types allowed: Alphanumeric

Note: The field options (choices) for a single choice UDF need to be created separately.

5.5.1 Field options

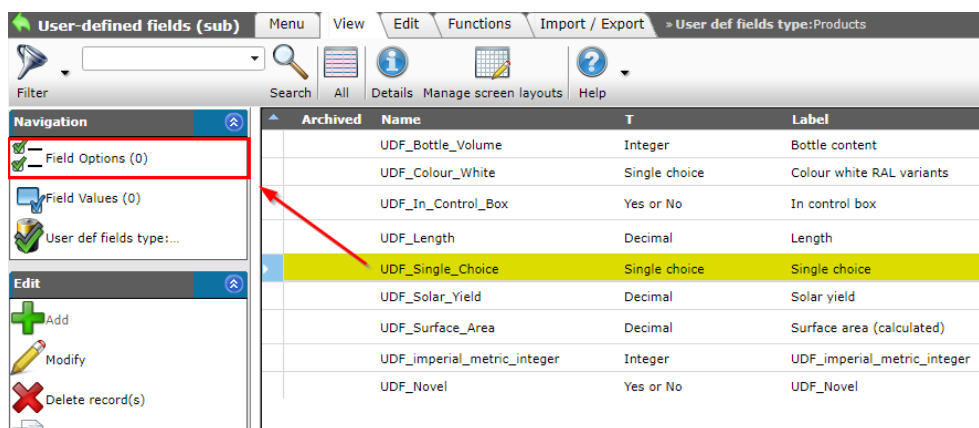
Field options must be created for the following types of user-defined fields:

- Single choice
- Multiple choice

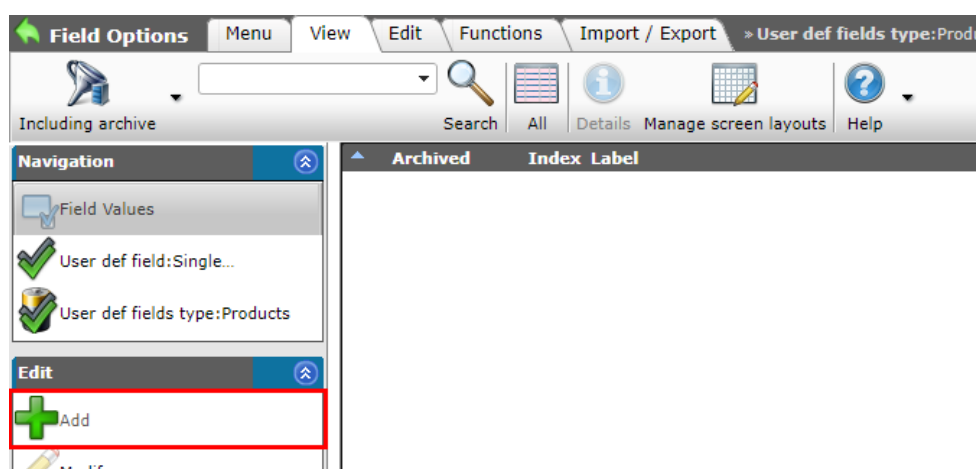
Note: For the user-defined field type *Selection list*, you do **not** need to create field options. However, the options for the Selection list filter tab, need to be created for a user-defined field of the type *Multiple Choice*. See paragraph [5.15 Selection list](#) for more details.

To add field options for a single or multiple choice user-defined field:

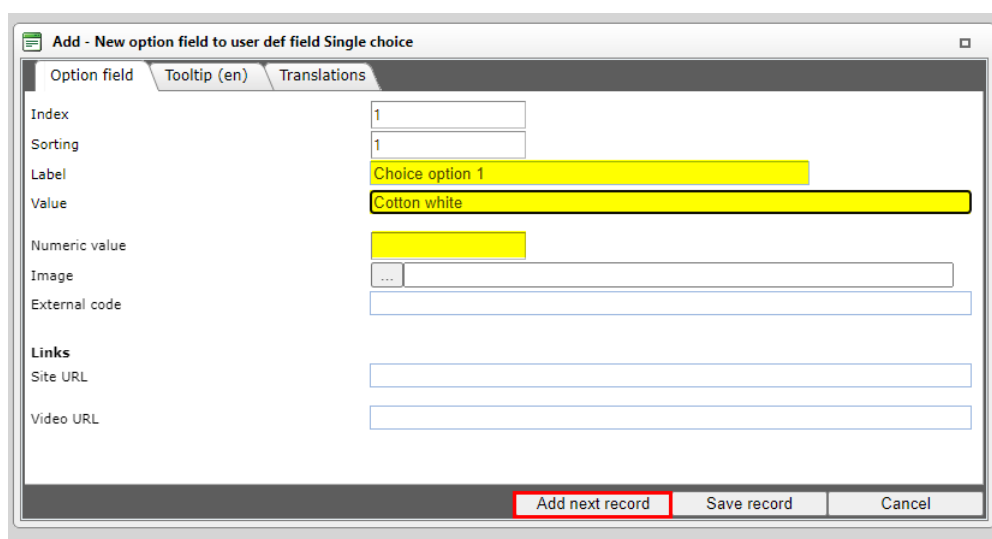
1. After creating a single or multiple choice UDF, under Navigation, click on *Field options*.



2. On the next screen, click on +Add to add the first option (choice):



3. In the pop-up window:



Option field	Tooltip (en)	Translations
Index	1	
Sorting	1	
Label	Choice option 1	
Value	Cotton white	
Numeric value		
Image	...	
External code		
Links		
Site URL		
Video URL		

Buttons: Add next record, Save record, Cancel

- Index:** The index number is automatically increased and uniquely identifies the field option. It is recommended to use the generated index.
- Sorting:** Field options are sorted in the drop-down list box according to this sorting order.

- c. **Label:** Enter a label for the field option; the option will appear under this name in the drop-down list box.
 - d. **Value:** Enter an alphanumerical value for the field option. Note: the value of a field option can be different from the label.
 - e. **Numeric value:** Enter a numeric value for the field option.
 - f. **Image:** Link an image to the field option. The link to the image can be used to display, for instance, an icon with each choice on the website. Note: the image will **not** show in the COS interface.
4. Click on *Add next record* to enter a second, third, etc. option.
 5. Click on *Save record* to save the (last) option.

Note: The option Field values, under Navigation, will show all records for which this option is in use, i.e. is filled out:

Archived	Name	T	Label
	UDF_Bottle_Volume	Integer	Bottle content
	UDF_Colour_White	Single choice	Colour white RAL variants
	UDF_In_Control_Box	Yes or No	In control box
	UDF_Length	Decimal	Length
	UDF_Single_Choice	Single choice	Single choice

Figure 2. UDF_Length has been filled out for 6 products

Value as text	Source
6	28210460 Keralt dakrandpaneel 200mm Heeringa Kunststof Profielen BV 08712058108097
4	28286540 Keralt dakrand Eindorofel 10mm Heeringa Kunststof Profielen BV 08712058058477
2,9	24300129 Unipanel bouwpaneel 510x16mm wit Heeringa Kunststof Profielen BV 08712058102369
2	140043899 LED E TS batterij 600 9W 800lm 4000K CT Opale 06956712666222
6	4000 Keralt dakrandpaneel 200mm Heeringa Kunststof Profielen BV
12	140043898 LED E TS BATTEN 600 9W 800LM 3000K CT (langere) Opale 06956712666215

Figure 3. The 6 products for which UDF_Length has been filled out.

5.6 Multiple choice

Use: The Multiple choice UDF can be used to create a multiple choice drop-down list.

Data types allowed: Alphanumeric

Note: The field options (choices) for a Multiple choice UDF need to be created separately, see paragraph [5.5.1 Field options](#).

Wijzigen

User def field Tooltip (en) Memo Translations

Name: UDF_Multiple_Choice

Normalized name: UDF

Sequence:

Type: Multiple choice

Label:

Header:

Field chapter:

Style

Parent field:

Suffix:

Unit:

Special

Default value:

Required: ☐ Yes ☒ No

In quick filter: ☐ Yes ☒ No

Summable: ☐ Yes ☒ No

Is copy allowed: ☒ Yes ☐ No

Mobile interface: ☐ Yes ☒ No

ShowMembers: ☐ Yes ☒ No

Application feature:

Add next record Check expression Save record Cancel

5.7 Multi-line text

Use: The Multi-line text UDF can be used for either formatted (HTML) or unformatted text.

Data types allowed: Alphanumeric

Wijzigen

User def field Tooltip (en) Memo Translations

Name: UDF_Multi-line_text

Sequence:

Type: Multi-line text

Label:

Header:

Field chapter:

Style

Max length: 4000

Suffix:

Special

Default value:

Required: ☐ Yes ☒ No

In quick filter: ☐ Yes ☒ No

Translatable: ☐ Yes ☒ No

Calculated: ☐ Yes ☒ No

HTML: ☒ Yes ☐ No

Summable: ☐ Yes ☒ No

Is copy allowed: ☒ Yes ☐ No

Mobile interface: ☐ Yes ☒ No

ShowMembers: ☐ Yes ☒ No

Application feature:

Add next record Check expression Save record Cancel

5.7.1 Max length

This UDF is limited to 2000 characters when used for **unformatted** text. By entering a value for *Max Length*, the number of characters can be expanded.

5.7.2 HTML

When the option *HTML* is set to Yes, the text may contain HTML-tags, such as , <p>, , etc. Also, the number of characters that the field can contain is no longer limited.

5.8 Image

Use: The Image UDF adds an image selector to the entity, with which an image can be added.

Data types allowed: Any type of image file.

Edit - UDF_Image

User def field | Tooltip (en) | Memo | Translations

Name: UDF_Image

Normalized name: UDF_Image

Sequence:

Type: Image

Label:

Header:

Field chapter:

Style

Suffix:

Special

Default value:

Required: ☐ Yes ☒ No

In quick filter: ☐ Yes ☒ No

Summable: ☐ Yes ☒ No

Is copy allowed: ☒ Yes ☐ No

Mobile interface: ☐ Yes ☒ No

ShowMembers: ☐ Yes ☒ No

Application feature:

Edit the previous one | Edit the next one | Check expression | Save record | Cancel

Note: At the entity to which this UDF is added, an image can be upload/selected:

Figure 4. Image datafield which is added to the entity

5.9 Date

Use: The Date UDF adds a date selector to the entity, with which a date can be added.

Data types allowed: Date

Edit - 140043898 LED E T5 BATTEN 600 9W 800LM 3000K CT (langer) Opplé 06956712666215

UDF Imperial_metric_integer: 12 Meter

Solar yield: Solar panel yield per surface area

Single choice: [v]

UDF_Image: [...]

UDF_Date: [Calendar: August 2022, 25th selected]

Bottle content: [i]

UDF_Novel: [i]

Colour white RAL variants: [i]

Aanvullende product informatie

In control box: [i]

Length: [i]

Length (Imperial): [i]

Surface area (calculated): 1000 Square meter

Buttons: Edit the previous one, Edit the next one, Save record, Cancel

5.10 Time of day

Use: The Time of Day UDF adds a date/time selector to the entity, with which a date/time can be added.

Data types allowed: Date/time

Wijzigen

User def field: UDF_Time_of_day

Sequence: []

Type: Time of day [v]

Label: []

Header: []

Field chapter: [] [x]

Style

Suffix: []

Special

Default value: []

Required: ☐ Yes ☒ No

In quick filter: ☐ Yes ☒ No

Summable: ☐ Yes ☒ No

Is copy allowed: ☒ Yes ☐ No

Mobile interface: ☐ Yes ☒ No

ShowMembers: ☐ Yes ☒ No

Application feature: []

Buttons: Add next record, Check expression, Save record, Cancel

5.11 Range

Use: The Range UDF can be used for any range of decimal numbers.

Data types allowed: Numeric (decimal)

Note: The range UDF can be used with metric and imperial units.



5.12 GTIN

Use: The GTIN UDF can be used to add a GTIN number.

Data types allowed: GTIN number

Note: The GTIN data field will be checked for proper formatting/value:

5.13 Percentage

Use: The Percentage UDF can be used to add a percentage.

Data types allowed: Percentage (decimal)

The screenshot shows the 'Wijzigen' (Edit) dialog box for a User Defined Field (UDF). The 'Name' field is 'UDF_Percentage'. The 'Normalized name' is 'UDF_Percentage'. The 'Sequence' is empty. The 'Type' is set to 'Percentage'. The 'Label' is empty. The 'Header' is empty. The 'Field chapter' is empty. The 'Style' is empty. The 'Suffix' is empty. The 'Special' section includes 'Default value' (empty), 'Required' (No), 'In quick filter' (No), 'Calculated' (No), 'Summable' (No), 'Is copy allowed' (Yes), 'Mobile interface' (No), 'ShowMembers' (No), and 'Application feature' (empty). The bottom buttons are 'Add next record', 'Check expression', 'Save record', and 'Cancel'.

5.14 Table value

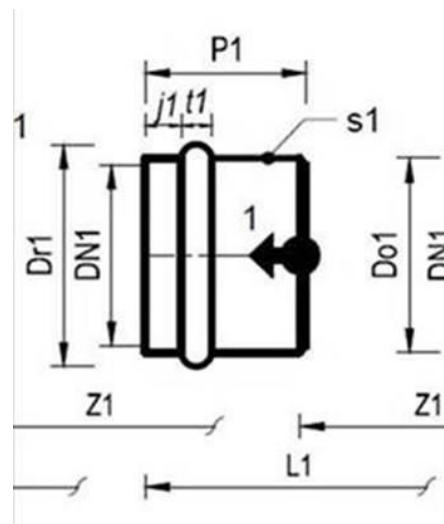
Use: The Table value UDF can be used to add a standard table value.

Data types allowed: Numeric (decimal)

Some products are available in standardized sizes, where essential dimensions are defined according to a standard table of measurements. Thus, a *Table value UDF* can be used with a standard table to look up the corresponding OUT value based on a given IN value:

Example

Measure	j1	t1	P1.	s1
12	0	6,2	17	1,5
15	0	7	20	1,5
18	0	7	20	1,5
22	0	8	21	1,5
28	0	8,2	23	1,5
35	0	8,2	26	1,5
42	0	9,8	30	1,5
54	0	9,7	35	1,5
66,7	0	13,6	50	1,8
76,1	0	14,8	55	2
88,9	0	17	63	2
108	0	20,2	77	2





Given the input value: $d1=28$, the outgoing values $j1 = 0$, $t1 = 8.2$ etc. apply.

More information on Standard tables can be found in the *Manual Standard Tables*, which is available on the Compano Help website.

5.15 Selection list

Use: This type of user-defined field allows for selection of a specific role for a person from a pre-defined list of roles.

Data types allowed: Special, See example below.

Entities: The selection list field can only be used with the entities:

- Contact persons
- Units
- Packing forms

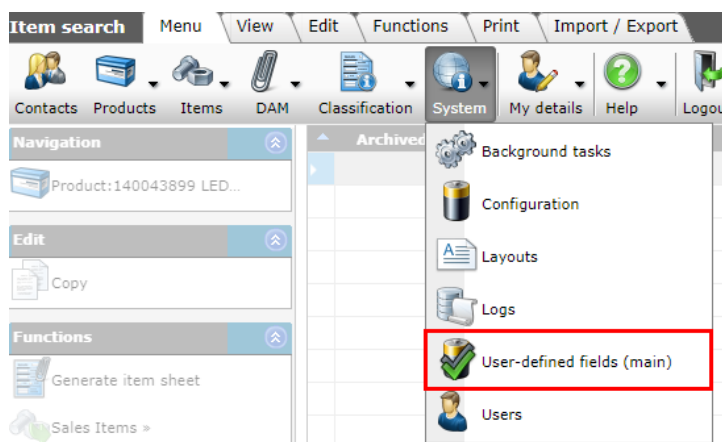
Example

An installation project involves various parties, including a contractor, plumbing installer, tiler and more. In order to assign the right people to each project, the wholesaler can choose from a list of people who can fulfill this role.

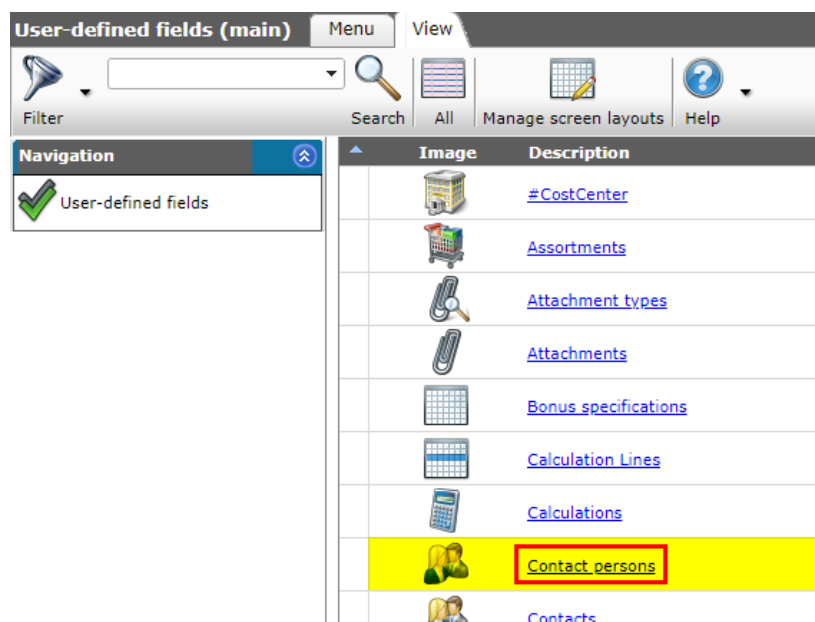
5.15.1 Create [multiple] choice list

Before you can add a selection list, first a multiple choice list with roles needs to be created:

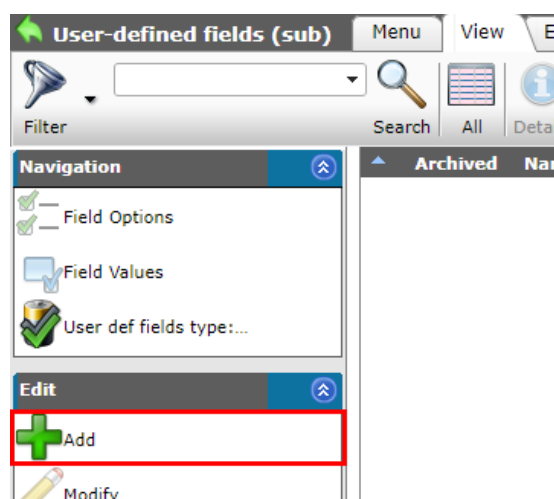
1. Through the Menu go *System > User-defined fields (main)*.



2. From the list, click on the link Contact persons.



3. Under Edit, click on *+Add*.



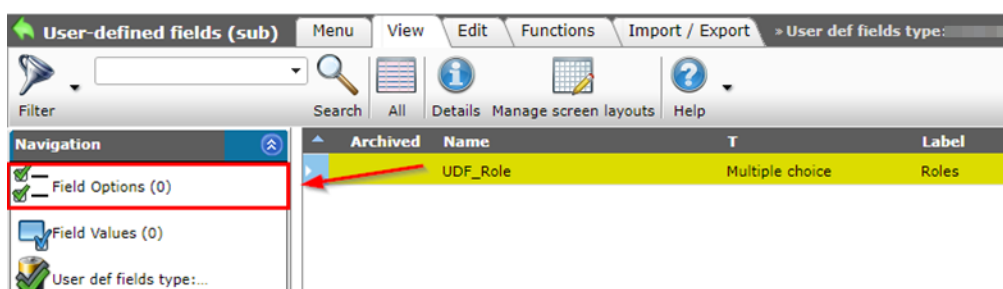
4. In the pop-up screen fill out the following fields:

- Name:** Type a name for the user-defined field.
- Type:** For a selection list, either use a *Multiple Choice* (choose from multiple roles), or *Single Choice* (choose one specific role) type. Tip: Use Multiple Choice, as the use of one user-defined field with multiple options suffices.
- Label:** Type a label for the field.
- Header:** Type a header for the field.

5.15.2 Add [multiple] choice list options

Create the list options:

- Select the (multiple) choice list that you just made and, under Navigation, click on *Field options*.



- Under Edit, use the *+Add* button to add all list options:

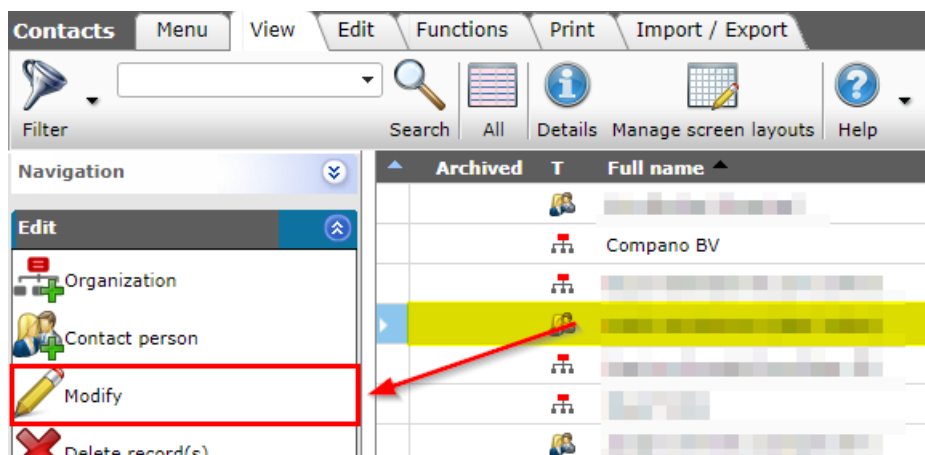
3. For each option, fill out the following data:
 - a. **Index**: This field is filled out automatically.
 - b. **Sorting** (optional): Indicate where you want to see this option in the drop-down list
 - c. **Label**: Type a name for the label. Note: The name for the label allows you to use spaces and/or punctuation marks. E.g.: **at night**
 - d. **Value**: Specify the value for this choice; in this example, the *role*. Note: When entering the value, **do not** use spaces and punctuation marks. E.g.: **at_night**
 - e. **Numeric value**: In certain situations, an (alphanumeric) value cannot be handled properly. In that case, specify a **numeric value** here as well. Note: Choose a **unique** number for each option.

5.15.3 Set roles

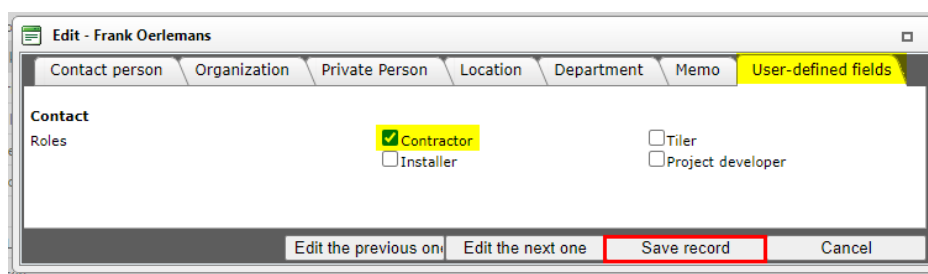
You can now set the role(s) for each person:

1. Through the Menu, go to *Menu > Contacts*:

2. Select a contact and, under Edit, click on *Modify*.



3. Go to the *User-defined fields* tab and select one (or more) roles for this contact:

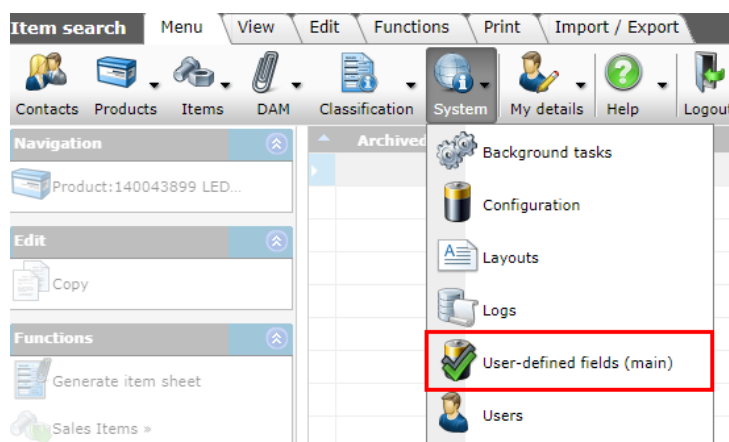


4. Click on *Save record*.
5. Repeat this action for other contacts.

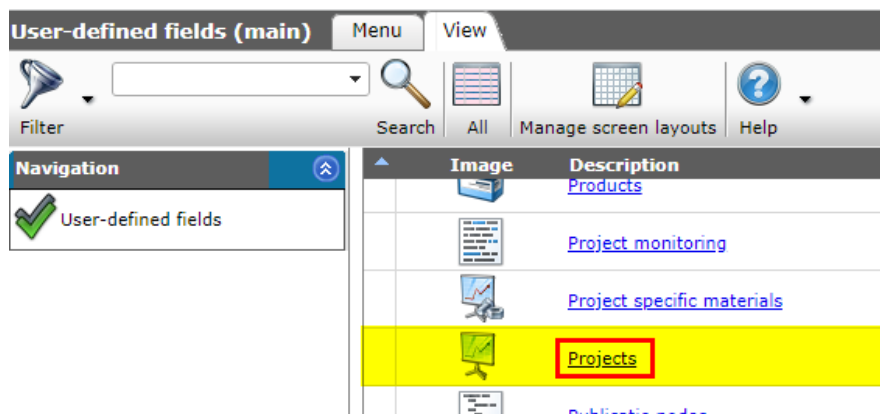
5.15.4 Create Selection list

To be able to assign roles, for each of the Roles a user-defined field of type *Selection list* needs to be created. In this example these UDFs need to be created on the entity Project:

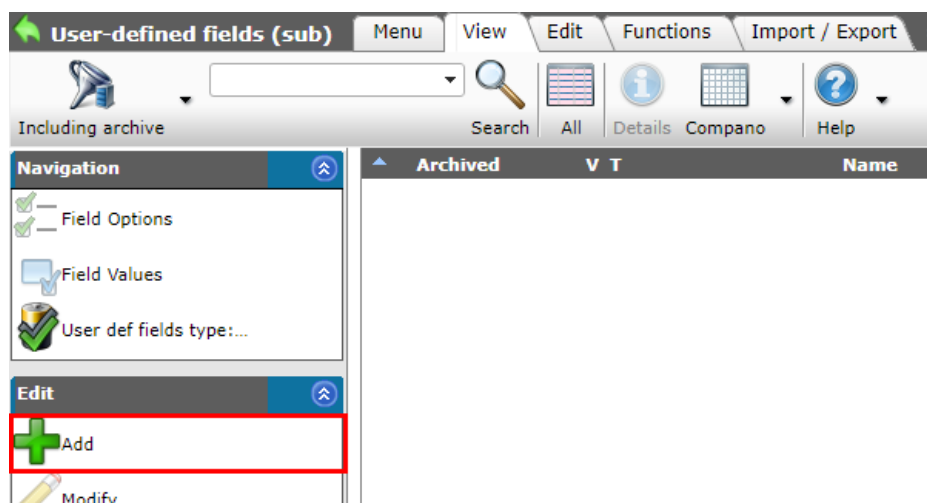
1. Through the Menu, go to *System > User-defined fields (main)*.



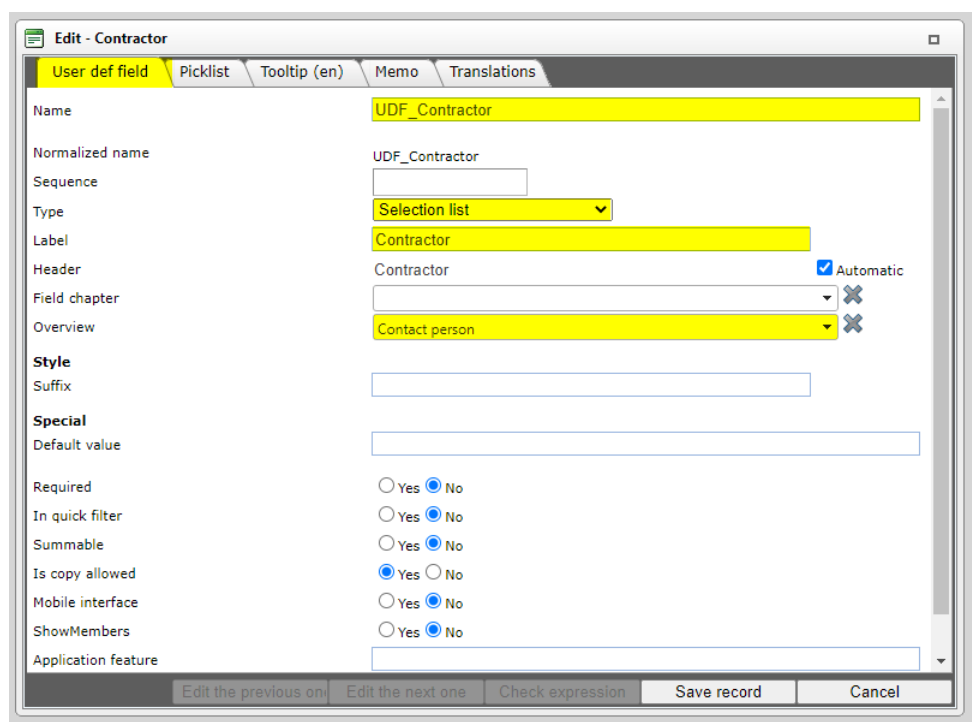
2. In the list, click on the link *Projects*.



3. Under Edit, click on **+Add**.



4. In the pop-up window:



User def field tab

- Name:** Type a name for the user-defined field.
 - Type:** Select the option Selection list.
 - Label:** Type a label name.
 - Overview:** Select the entity for which the multiple choice list was created; in this example Contact person.
5. Next, go to the *Picklist* tab and select the option(s) for this role:

- Click on *Save record*.
- Repeat this process for all other roles.

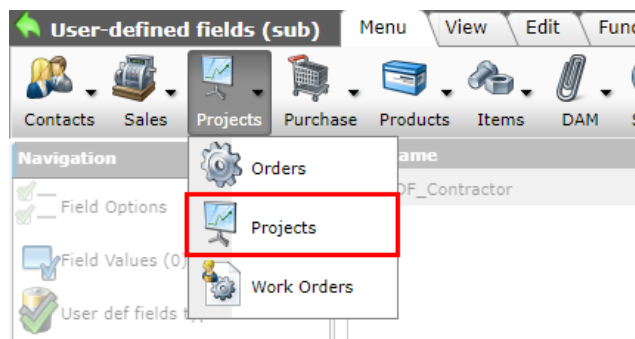
Tip: To easily see for which entity, which Selection list fields with which choice (role) have been created, it is useful to add the Picklist and Entity fields to a screen layout for the Overview User-defined fields:

Name	Type	Label	Application	Picklist	Entity
UDF_Contractor	Selection list	Contractor		with roles: contractor	PRJ.Project

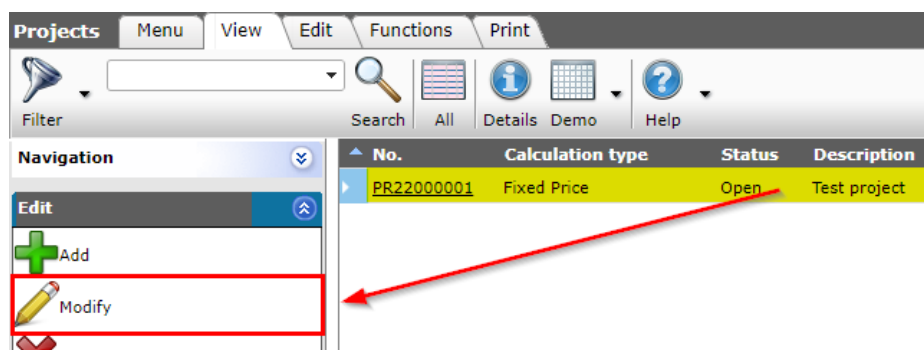
5.15.5 Using a selection list

To see the resulting selection list:

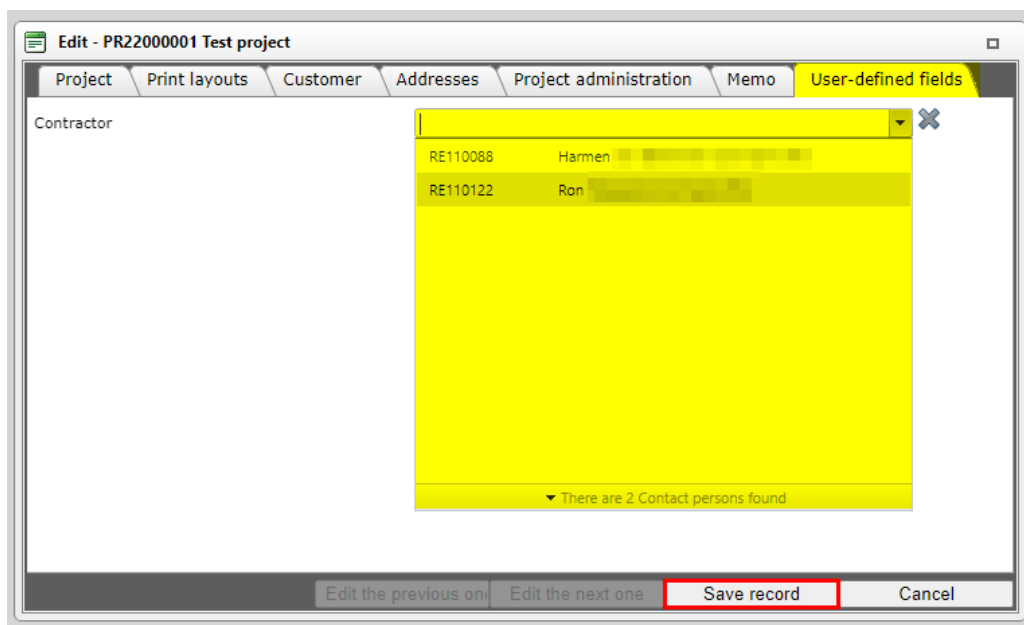
- Through the Menu, go to the overview of Entity where you added the selection list(s), in this example Projects:



- Modify(or Add)* a (new) project:



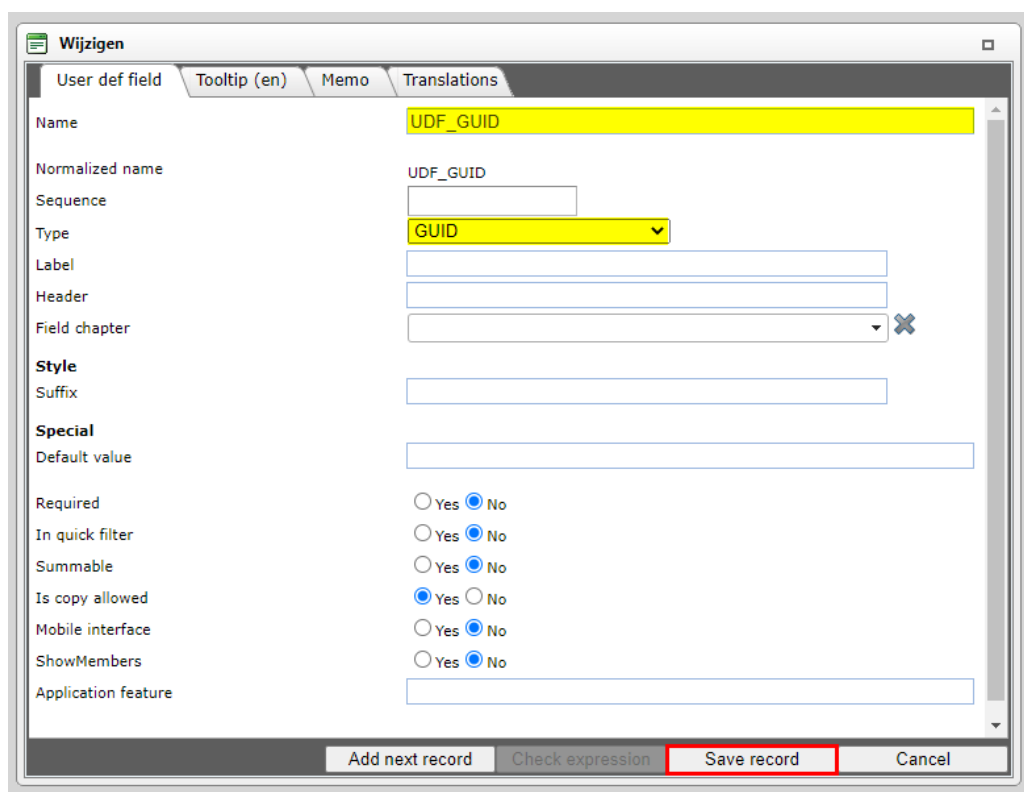
3. In the pop-up windows, on the tab User-defined fields, you can now select, for instance, a Contractor:



5.16 GUID

Use: The GUID UDF can be used to add a Global Unique Identifier, which is commonly used with (SQL) databases.

Data types allowed: Unique alphanumeric string of 36 characters.



Wijzigen

User def field Tooltip (en) Memo Translations

Name: UDF_GUID

Normalized name: UDF_GUID

Sequence:

Type: GUID

Label:

Header:

Field chapter:

Style

Suffix:

Special

Default value:

Required: ☐ Yes ☒ No

In quick filter: ☐ Yes ☒ No

Summable: ☐ Yes ☒ No

Is copy allowed: ☒ Yes ☐ No

Mobile interface: ☐ Yes ☒ No

ShowMembers: ☐ Yes ☒ No

Application feature:

Add next record Check expression **Save record** Cancel

Note: GUID UDF fields will **not** show with records of the entity to which they are added. As GUID will usually be generated by the database server. The GUID can then be imported into a GUID UDF in COS.

6 Appendix B: Nested single choice lists

The user-defined field of type Single Choice can be used to make nested choice list, where are—after a first choice—a second (or third, fourth, etc.) choice can be made.

Example

A product is available in several variants of a main colour, for instance:

Material colour:

- White
 - Cream white
 - Ice white
- Gray
 - Light gray
 - Dark gray
- Black

To create a nested choice list:

1. First, create a single choice list for the *Main colour*.

2. Next, create the main colour options:

Index	Label
1	White
2	Gray
3	Black

3. Now, create a new single choice UDF for the *Detail Colour*.

Wijzigen

User def field Tooltip (en) Memo Translations

Name: Detail_colour

Normalized name: Detail_colour

Sequence:

Type: Single choice

Label: Colour detail

Header: Colour detail ☒ Automatic

Field chapter:

Style

Parent field: Main colour

Suffix:

Unit:

Special

Default value:

Add next record Check expression **Save record** Cancel

- a. **Parent field:** Make sure to set the parent field to Main colour:
4. Next, create **all** the sub-options for Detail colour:

Edit - 01

Option field Tooltip (en) Translations

Index: 1

Sorting: 1

Label: Cream white

Value: Cream white

Numeric value:

Image:

Parent field option: Main colour

External code:

Links

Site URL:

Video URL:

There are 3 Field Options found

Edit the previous one Edit the next one **Save record** Cancel

- a. **Parent field:** Make sure to set the correct parent field (Main colour) for each of the sub-options.

Field Options Menu View Edit Functions Import / Export > User def fields type:Products > User def field:Colour detail

Including archive Search All Details Manage screen layouts Help

Navigation

- Field Values (0)
- User def field:Colour...
- User def fields type:Products

Archived	Index	Label
	1	Cream white
	2	Ice white
	3	Light gray
	4	Dark gray

Figure 5. All sub-options for Detail colour.

- When filling out the Main colour at a Product record, the Colour detail drop-down will only show the sub-options for the chosen Main colour:

The screenshot shows a software interface for editing a product record. The title bar indicates the product is 'LED E T5 BATTEN 600 9W 800LM 3000K CT (larger) Opplé 069567126'. The interface has tabs for 'ion', 'Model', 'Commercial description (product) (en)', and 'Technical description'. A list of fields is on the left, including 'UDF_Range', 'UDF_Range (imperial)', 'UDF_GTIN', 'UDF_Image', 'UDF_Time_of_day', 'UDF_Percentage', 'Main colour', 'Colour detail', 'UDF_Selection_List', and 'Bottle content'. The 'Main colour' field is highlighted with a red box, and its dropdown menu is open, showing 'White' as the selected option. The 'Colour detail' dropdown is also open, showing 'Cream white' and 'Ice white' as sub-options.

Field	Value
UDF_Range	12.00
UDF_Range (imperial)	423.78
UDF_GTIN	
UDF_Image	...
UDF_Time_of_day	
UDF_Percentage	%
Main colour	White
Colour detail	Cream white Ice white
UDF_Selection_List	
Bottle content	