



# Manual User-defined Fields

Version L7.2





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	0 0		$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\diamond$	$\bigcirc$	$\bigcirc$	$\bigcirc$			Z



8 Appendix B: Nested single choice lists





# **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 User-defined field (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.
    A data object, for instance Product, Item, Project, Price, etc.
    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, <u>sales@compano.com</u> 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.

5	Edit - 140043898 LED E T5 BATTEN 600 9W 80	0LM 3000K CT (langer)	Opple 06956712666	215		
0	Commercial description (product) (en)	Technical description	n (product) (en)	Additional	User-defined fields	Trar
	UDF_Novel		own			
9	Colour white RAL variants		~			
<u>C</u>	Additional product information			<ul> <li>Field chapt</li> </ul>	er (group) heading	
2	In control box	🔾 Yes 🔍 No				
c	Length		Meter			
	Length (imperial)		Inch			
2	Surface area (calculated)	1000 Square meter				
Q						



4

# 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:



Item search Menu	View	Edit Functio	ons Print Import / Export
🤼 🗐 . 🗞 .	0.	B.	💽 🥹 . 📀 . 🎼
Contacts Products Items	DAM	Classification	System My details Help Logou
Navigation	۲	<ul> <li>Archived</li> </ul>	Background tasks
Product:140043899 LED			Configuration
Edit	۲		Layouts
Сору			Logs
Functions	۲		User-defined fields (main)
Sales Items »			🙎 Users

2. Click on Field chapters:



3. Under Edit, click on +Add:







4. In the pop-up window:

📄 Add - New field chapter			
Field chapter Translations			
Code	Product		
Description	Additional product info	ormation	
	Add next record	Save record	Cancel

- 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.

<u>Note</u>: 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):





User-defined fields (main) Menu View									
Contacts Products Items	DAM.	Classification	System	Wy details	🕜 🗸	Logout			
Navigation	۲	🔺 Imag	Ba	ackground ta:	sks				
User-defined fields			La La	onfiguration ayouts ogs					
			Ve 📎	ser-defined fi	elds (main	)			
			🚨 Us	sers					

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



3. Either Add a new UDF(see chapter <u>3. CREATING USER-DEFINED FIELDS</u>) or Edit an existing UDF and in the pop-up window:





User def field Tooltip (en)	Memo Iranslations	
Name	UDF_Colour_White	
Normalized name	UDE Colour White	
Sequence	5	
Туре	Single choice V	
Label	Colour white RAL variants	utomatic
Header	White RAL	utomatic
Field chapter		- 🗙
Style	Assortment Additional assortment information	
Parent field	Item Additional item information	*+
Suffix	Marketing Additional marketing information	
Unit	Product Additional product information	×
Special		
Default value		
Desided		
Required		
Summable		
Is conv allowed		
Mobile interface	There are 4 Field groups found	
ShowMembers		
	Edit the previous one Edit the next one Check expression Save reco	ord 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):







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:





Manipuleren							×
Manipulating Transla	ations						
Name	No action	~					
Sequence	No action	~					
Туре	No action	~					
Label	No action	~					
Header	No action	~					
Field chapter	Grant	~		•			
Parent field	No action	~		Additional			
Number notation	No action	✓ Asso	ortment	assortment information			
Suffix	No action	~		Additional item			
Units		item	l	information			
Unit	No action	✓ Mar	ketina	Additional			
Unit results	No action	✓	Keting	information			
Imperial	No action	✓		Additional			
Special		Proc	luct	information			
Default value	No action	~					1
Required	No action	~					
In quick filter	No action	~	These	A Field service feed 1			
Translatable	No action		There are	4 Field groups found			
Calculated	No action	~					
Totalizable	No action	~					-
					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	1			UDF	Type	s allov	ved							
					Acces	ssory	produ	cts	All										
					Assor	tment	t		All										
					Attac	hment	S		All										
					Attac	hment	types	5	All				_						
					Bonu	s agre	emen	t	All										
					speci	ficatio	n		A.11				-						
					Certif	icate t	уре		All				_						
					Certif								-						
					Choic	e item	<u>15</u>	$\sim$		$\sim$	$\sim$	$ \frown $	- O						
					select	tion lie	ı et		All										
					Conta	ict per	sons	$\bigcirc$	All	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\circ$						
					Conta	icts	00110		All										
					Cost	Гуре	$\diamond$	$\diamond$	GUII	ר כ	$\diamond$	$\diamond$	$\diamond$			$\diamond$	$\diamond$	$\diamond$	
																-	~	~	
															$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$				$\sim$
$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$		4.0		$\sim$
$\sim$	$\sim$	$\sim$	$\sim$	$\circ$	$\bigcirc$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$			10		



ETIM Product Class	All
Features	
ETIM Product models	All
Item-Item relations	All
Item Groups	All
Items	All
Locations	All
Languages	All
Manufacturers	All
Material	All
Requirements List	
Lines	
Organizations	All
Private persons	All
Product-Product	All
relations	
Product Groups	All
Products	All
Product parts	
Projects	GUID
Project Monitoring /	GUID
Dimensions	
Project Specific	GUID
Materials	
Publication Nodes	All
Publication Links	All
Purchase Contracts	All
Product order Lines	All
Purchasing	All
conditions	
Rates	GUID
Recipe Lines	All
Suppliers	All
Transfer Lines	All
User-defined fields	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):





Field chapters Menu	View	Edit Imp	ort / Export
🥂 🤜 🙈	0.		💽 🦆 . 📀 . 陸
Contacts Products Items	DAM	Classification	System My details Help Logout
Navigation	$\otimes$	▲ Code	Background tasks
Configuration		<u>Item</u>	
		Marketing	Configuration
Edit	۲	Product	A=1.
Add			Layouts
Modify			Logs
Delete record(s)			User-defined fields (main)
			Users

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.





📄 Edit - Noise level outdoor unit		
User def field Tooltip (en)	Memo Translations	
Name	UDF_Noise_Level_Outdoor_Unit	<b>^</b>
Normalized name	UDF_Noise_Level_Outdoor_Unit	
Sequence	172	
Туре	Decimal 🗸	
Label	Noise level outdoor unit	
Header	Noise level outdoor unit Automatic	
Field chapter	Additional product information	- ×
Style		
Number notation	Standard	~
Suffix		
Unit	DECIBELA	<b>-</b> X
Imperial		- *
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
	Add next recordCheck expressionSave record	Cancer

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

<u>Tip</u>: 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.

<u>Important</u>: 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 <u>APPENDIX A: TYPES OF USER-DEFINED FIELDS</u> for an explanation of the different types of fields and their options:





Decimal	~
Text	
Integer	-
Yes or No	
Price	
Decimal	
Single choice	
Multiple choice	
Multi-line text	
Image	F
Date	
Time of day	
Range	F
GTIN	-
Percentage	
Table value	
Matrix	-
Selection list	
GUID	
Vec O No	

- d. **Label**: Enter a name for the label. The label will show on the tab User-defined fields. <u>Note</u>: 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 userdefined 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

						Wijzigen															
						User defined	l field Tool	tip 🔪 Memo	Translation	s											
						lame															
					1	ype			Decimal		~										
					L. L. L.	abel															
						iead Field chapter								- 3	:						
						Format Number Notation Jnit mperal	n		Standard	I			~	• 3 • 3							
						<b>Special</b> Default value Required			🔿 Yes 💿	No											
					I A A	n quick filter Calculated ITML Sommable			<ul> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> <li>Yes</li> </ul>	No No No											
					$\circ$	Application Feat	ure		O Yes	No											
					0	$\sim$	$\bigcirc$	$\bigtriangledown$	$\bigtriangledown$	$\bigtriangledown$	$\diamond$	$\diamond$	Save	$\bigcirc$	Cancel						
																		$\diamond$	$\diamond$	$\diamond$	
																	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\supset$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$
>	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			14		



### 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	Х	-		-	-	-	-
Integer		-	Х	-	-	-	-
Decimal		Х	Х	-	Х	Х	-
Single choice		-	Х	Х	Х	-	-
Multiple choice		-	Х	Х	Х	-	-
Multi-line text	Х	-		-	-	-	-
Range		-	Х	-	Х	Х	-
Table value		Х	Х	-	Х	-	-
Matrix		-	Х	-	Х	-	Х

### 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 <u>Appendix B: Nested single choice</u> 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. <u>Note</u>: This is an optional feature.

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#### **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 O No		
Mobile interface	🔿 Yes 🔍 No		
Application Feature			
			•
		Save	Cancel

Not every field has the same options; depending upon the type of field, the following general options may be available. More specialized options are explained in <u>APPENDIX A: TYPES OF USER-DEFINED FIELDS</u>.

- **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:

Edit - 108F2140040190 108F2140040190	FLATLINE 21-400x0400	
Product Classification Model	Commercial description 🔪 Technical description 🔪 Other 🔪 UDF	Translations
Translations English (United Kingdom)		
Brand		Automatic
Commercial description		
		/
Description	108F2140040190 FLATLINE 21-400x0400	Automatic
Series	I FLATLINE 33 - 8 - HOR	Automatic
Short description	108F2140040190 FLATLINE 21-400x0400	Automatic
Technical description		
Туре	U FLATLINE 33 type 21	Automatic
Additional description	1	ranslatable UDF

• **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 Compano database fields and/or specific functions such as CONCAT, IF, etc. For more information on Expressions, see the *Manual Expressions*.

16



User defined field Expression Tooltip Memo Translations
🔁 🐡 Ω •   ¾ 🗠 🤊 • 🔍 • 🕼 🖗 🗞 🗞
B I 및 abe 副書 圖 圖 🗴 × 🦛 🏷 法 律 詳 汪 汪 🔯 象 🛞 Arial, Helveti ▼ 24px ▼ A ▼ 🗞 ▼ Apply CSS Cl ▼
📓 🖀 🗟 ⊘ 💿 💌 Insert field 🔮 💷 🖷 🕮 🐺 🎽 💷 🕼 👘 🎽 🖉
(32+(1.8*[ProductRecord.MaxMediumTemp/]))
Operators COS data field

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:

ſ	108F2140040190 108F2140040190 FLA	ATLINE 21-400	0x0400		-
	Product Classification Other	Items	UDF	Translations	
	Additional description	This	is an ad	ditional descriptio	on with <b>bold</b> text.

- **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. <u>Note</u>: This option will only be available once the optionCalculated is set to Yes.
- 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.
   <u>Note</u>: 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 underlying<sup>1</sup> COSenvironments. 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:

		<sup>1</sup> COS-	enviro	nment	s can b	e nest	ed, wit	h a ma	ain 'mo	other' e	enviror	ment	and ur	derlyii	ng 'dau	ughter'	and	$\diamond$	$\diamond$	$\diamond$
		ʻgrand	daugh	ter' en	vironn	nents.											$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			17	



Units Menu View E	nits Menu View Edit Functions Import / Export									
≫.	-		1							
Filter		Search All	Details Manage screen							
Navigation	$\otimes$	▲ Code	Туре							
		BAR	Pressure							
		CEL	Temperature							
Edit	$\otimes$	СМК	Surface							
Junits metric		CMT	Length							
		DAY	Time							
Imperial		DECIBELA	Other							
Add		DEG	Other							
		DMT	Length							
Modify										

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:

Units Menu View	Edit	Functions 1	Import / Export
▶.	•	- 🔍 📃	1
Filter		Search All	Details Manage screen
Navigation	۲	▲ Code	Туре
Configuration		BAR	Pressure
Configuration		CEL	Temperature
Edit	۲	СМК	Surface
		CMT	Length
		DAY	Time
Imperial		DECIBELA	Other
Add		DEG	Other
		DMT	Length

3. In the pop-up window:





Unit Translations		
Гуре	Other 🗸	
System	Metric 🗸	
Code	(1) 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	10.763910400000000	
	Add next record Save record	Cancel

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

### 3.4.2 Metric/Imperial units<sup>2</sup>

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.

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

📄 Edit - Bore		
User def field Tooltip	lemo Translations	
Name	Bore	1
Normalized name Sequence	Bore	
Туре	Decimal	
Label	Bore	
Header	Bore Automatic	
Field chapter	03. valve options	Į
Number notation	Standard	
Unit	MMT Millimeter 👻	
Imperial	INH Inch 👻	
Special		
Default value		-
	Edit the previous on Edit the next one Check expression Save record Cancel	

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

					Bor Bor	e e (imper	ial)				(1) 30. (1) 1.18	00 B		Millin Inch	neter ✓ Auton	natic				
		<sup>2</sup> The o	ption I	Metric	/Imper	ial uni	ts is no	ot avai	lable b	y defa	<i>ult;</i> if r	needec		e requ	est this	s optio	n by cc	ntacti	ng	$\diamond$
		<u>sales@</u>	compa	ano.co	<u>m</u> .												$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			19	



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

Bore	i	30.00	Millimeter 🗌 Automatic
Bore (imperial)	i	1.20	Inch 🗌 Automatic

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

eter	vierkante centimeter		cino	Square centime	ster
Edit - FOT Foot					
Unit Translat	tions				
Туре		Length	~		
System		Imperial	~		
Code	(	FOT			
Abbreviation		ft			
Description		Foot			
Plural description		Feet			
ICS Unit		Foot			- <b>X+</b> /
Factors					
Factor		0.304800000000000	00 meter		
					•
	E	dit the previous on	Edit the next one	Save record	Cancel
	Vilamatar		loss	Vilamatar	

# 3.5 Tooltip

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

TES OF NO	TH COULOU DOX	
📄 Edit - In control	box	
User def field	Tooltip (en) Memo Translations	
🔁 🦃 Ω - 🐰		
BI uabe	副書 〓 ■ 麗   🗙 🔺 🚝 🎋 🅻 律 譚 証 汪 🔝 😣 😣 Arial, Helveti 🔹 13px 🔹 A	👌
🛛 😭 🔜 🥥 (	🗩 💽 Insert field 📲 💷 💼 🗮 🐨 💷 💷 🎼 👔 💷 💷 🔛 🌁 🗭 🗹	
Indicate whether th	is product is part of the control box.	
Edit	the previous on Edit the next one Check expression Save record Cancel	
[		

20



This tooltip will show next to the user-defined field on the user-defined fields tab of the Entity when the  ${f I}$  -

Edit - 140043898 LED E T5 BATTEN	600 9W 800LM 3000K CT (	langer) Opple 069567	12666215					
💽 ion 👗 Model 👗 Commercial description (product) (en) 👗 Technical description (product) (en) 👗 Additional 🕺 Use								
UDF_Novel	◯ Yes ◯ No	Unknown						
Bottle content	3	Liter						
Solar yield		Solar panel y	eld per surface area					
UDF_imperial_metric_integer	12	Meter						
Colour white RAL variants		~						
Additional product information								
In control box	i		*					
Length	Indicate whether t	his product is part of t	he control					
Length (imperial)	4/2.44	Inch 🔽 Auton	natic					
Surface area (calculated)	1000 Square m	leter						
		-						
	Edit the previous on	Edit the next one	Save record	Cancel				
	21W-4000-WH-CI							

icon is clicked:

### 3.6 Memo

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

Edit - In control box	
User def field Tooltip (en) Memo Translations	
💝 $\Omega$ = 🖨 🔁   🔏 🗈 😩 🥙 = 🔍 🗐 🥵 🥵 🏪 🔐 Insert Code Snippet = 💌 Insert field	
B I 및 abe   三 三 三 三 二 🕺 🖈 🐂 🧍 🏠 谭 詳 三 三 🧕 🛞   Arial, Helveti ▼ 13pz	х т.
his UDF is only used for the product ranges VX12, VX15 and ABX.	
Edit the previous on Edit the next one Check expression Save record Cancel	

### 3.7 Translations

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

- Header
- Label
- Suffix
- Tooltip





User def field       Tooltip (en)       Memo       Translations         Translations Dutch (Standard)       Monsterkast       Automatic         Label       Monsterkast       Automatic         Suffix       Geef aan of dit product deel uit maakt van de monsterkast.       Image: Comparison of the comparison of the comparison of the control box.         Translations German       Pronsterkast       Automatic         Header       Monsterkast       Automatic         Label       Monsterkast       Automatic         Suffix       Geef aan of dit product deel uit maakt van de monsterkast.       Automatic         Translations English       Geef aan of dit product deel uit maakt van de monsterkast.       Image: Comparison of the control box         Suffix       Tooltip       In control Box       Automatic         Label       Indicate whether this product is part of the control box.       Automatic         Suffix       Indicate whether this product is part of the control box.       Image: Control Box       Image: Control Box	Edit - In control box			
Translations Dutch (Standard)   Header   Label   Suffix   Tooltip   Geef aan of dit product deel uit maakt van de monsterkast.   Automatic   Suffix   Tooltip   Geef aan of dit product deel uit maakt van de monsterkast.   Automatic   Translations English   Header   Label   Suffix   Tooltip   Geef aan of dit product deel uit maakt van de monsterkast.   Automatic   Automatic   Translations English   Header   Label   Suffix   Tooltip   Gentrol Box   Label   Suffix   Tooltip   In control box   Automatic   In control box   Automatic   In control box   Automatic   Label   Suffix   Tooltip	User def field 🔪 Tooltip (en) 🔪 Memo	Translations		
Header Monsterkast   Label   Suffix   Tooltip   Ceef aan of dit product deel uit maakt van de monsterkast.     Translations German   Header   Label   Suffix   Tooltip     Geef aan of dit product deel uit maakt van de monsterkast.     Automatic     Translations English   Header   Label   Suffix   Tooltip     Geef aan of dit product deel uit maakt van de monsterkast.     Image: Control Box   Label   Suffix   Tooltip     In control Box   Label   Suffix   Tooltip     In control box   Automatic     Label   Suffix   Tooltip     Indicate whether this product is part of the control box.     Automatic	Translations Dutch (Standard)			
Label   Suffix   Tooltip   Geef aan of dit product deel uit maakt van de monsterkast.   Tanslations German   Header   Label   Suffix   Tooltip   Geef aan of dit product deel uit maakt van de monsterkast.   Image: Control Box   Label   Suffix   Tanslations English   Header   Label   Suffix   Tooltip     Image: Control Box   In control Box   Label   Suffix   Tooltip     In control box   Indicate whether this product is part of the control box.	Header	Monsterkast	🗹 Automatic	
Suffix Tooltip  Translations German Header Label Suffix Tooltip  Translations English Header Label Suffix Tooltip  Translations	Label	Monsterkast		
Tooltip Geef aan of dit product deel uit maakt van de monsterkast.  Translations German Header Label Suffix Tooltip Geef aan of dit product deel uit maakt van de monsterkast.  Automatic  Translations English Header Label Suffix Tooltip Indicate whether this product is part of the control box.  Automatic Indicate whether this product is part of the control box.  Automatic	Suffix			
Translations German   Header   Label   Suffix   Tooltip     Geef aan of dit product deel uit maakt van de monsterkast.   Image: Control Box   Label   Label   Suffix   Translations English   Header   Label   Suffix   Tooltip     In control Box   Label   Suffix   Tooltip     Indicate whether this product is part of the control box.	Tooltip	Geef aan of dit product deel uit maakt van de monsterkast.		
Translations German   Header   Label   Suffix   Tooltip     Automatic   Automatic   Automatic     In control Box   Label   Suffix   Tooltip     In control Box   Indicate whether this product is part of the control box.				
Translations German   Header   Label   Suffix   Tooltip     Geef aan of dit product deel uit maakt van de monsterkast.     Image: Control Box   Label   Suffix   Translations English   Header   Label   Suffix   Tooltip     In control Box   In control box   Suffix   Tooltip     Indicate whether this product is part of the control box.				1
Translations German   Header   Label   Suffix   Tooltip				
Header Monsterkast Automatic Label Automatic Suffix Tooltip Geef aan of dit product deel uit maakt van de monsterkast.	Translations German	2		
Label   Suffix   Tooltip     Geef aan of dit product deel uit maakt van de monsterkast.     Automatic     Translations English   Header   Label   Suffix   Tooltip     Suffix   Tooltip     In control Box   In control box   Suffix   Tooltip     Indicate whether this product is part of the control box.	Header	Nonsterkast	Automatic	
Suffix Tooltip Geef aan of dit product deel uit maakt van de monsterkast.  Automatic Label Suffix Tooltip Tool	Label	Monsterkast	<ul> <li>Automatic</li> </ul>	
Translations English   Header   Label   Suffix   Tooltip	Suffix	Confirme of dit and wet deal with specific uses do expected wat		
Translations English   Header   Label   Suffix   Tooltip	Tooltip	Geer aan of dit product deer uit maakt van de monsterkast.		
Translations English   Header   Label   Suffix   Tooltip				
Translations English     3       Header		V Automatic		11
Header     3     Control Box     Automatic       Label     In control box     Automatic       Suffix     Indicate whether this product is part of the control box.       Tooltip     Indicate whether this product is part of the control box.	Translations English	Automatic		
Label In control box Automatic Suffix Tooltip Indicate whether this product is part of the control box.	Header	3 Control Box	Automatic	
Suffix Tooltip Indicate whether this product is part of the control box.	Label	In control box	Automatic	
Tooltip Indicate whether this product is part of the control box.	Suffix		1	
Automatic	Tooltip	Indicate whether this product is part of the control box.		
Automatic				
Automatic				
		Automatic		
Edit the previous on Edit the next one Check expression Save record Cancel	Edit the pre	vious on Edit the next one Check expression Save	e record	Cancel

### 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

HQ.	Item	Items			Alle talen
📕 Add - New la	iyout				
Layout	ields Memo				
Туре		Free form	$\sim$		
Name		Technical specific	ation		
Application		🔘 🎞 Within the co	ompany	Ser user	
			Add next record	Save record	Cancel
	Product accessories	Product accessories			Example import o

- a. **Name**: Enter a name for the Collection tab.
- b. **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

Layout Fields Memo				
Available fields		- Selected fields		
		Field	Header	
H. lexte		Length	Length	
Ime of day		Length (imperial)	Length (imperial)	
1 Iranslations		In control box	Control Box	
ler" User-defined fields				
Bottle content	<			
Colour white RAL variants				
In control box				
····· Length				ina
····· Length (imperial)				pn:
····· Solar yield				pn
Surface area (calculated)	•			luc
roperties				
		Add payt record	Save record	Cancol

- a. 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 BAT	TEN 600 9W 800LM 30	000K CT (langer) Opple	069567126662 🗆
Technical specification	Product 🔪 Classifica	ation Model Co	mmercial descripti
Length	12.00	Meter	r 🔤
Length (imperial)	472.44	Inch	🗸 Automatic
In control box	(1) 🔾 Ye	s 🖲 No	
Edit the previous on	Edit the next one	Save record	Cancel
140042070 00050221042427	reupanenceg s	4290-11W	

# 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:

Opple	140043898 06956712666215 DOOL # 2000 # 2000 # 2000 # ED	E T5
Edit - 140043898 LED E T5 B	3ATTEN 600 9W 800LM 3000K CT (langer) Opple 06956712666215	
Technical specification	Product Classification Model Commercial description (product) (en) Technical description	(pr()
Show fields	Technical specification Technical specification	<b>~</b>
Length (imperial)	Colour 472,44 Inch 🗹 Automatic	
In control box	(1) O Yes O No	
-	Edit the previous on Edit the next one Save record Cancel	
<u> </u>	3000-wn-ct	

# 5 Mapping user-defined fields

The values of user-defined fields can be mapped to ETIM values. This is a good solution for scenarios where a customer needs to add more technical product information to COS than the current ETIM standard can handle, or prefers to import technical data directly from his ERP and map this to the corresponding ETIM Feature Values.

### Example

A product is available in the colours Light Grey and Dark Grey, however for the corresponding ETIM feature Material Colour only the option Grey is available.

A user-defined field Colour is created with both colour values Light Grey and Dark Grey. Both values are then mapped to the ETIM feature Material Colour value Grey.

Both colours are now 'correctly' mapped to ETIM and will be uploaded as Grey to a data pool, while a data feed to the customer's product website can still distinguish between Light Grey and Dark Grey products.

More information about mapping user-defined fields can be found in the *Manual Mapping User-defined Fields*, which is available on the <u>Compano Help-website</u>.



# 6 Removing user-defined fields

To remove a user-defined field:

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



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



3. On the next screen, select the user-defined field that needs to be removed and, under Edit, click on *Delete record(s)*:





🔦 User-defined fields (sub)	Menu View Edit Functions Impor	t / Export »User-defined fields type	:Products
· · · ·			
Filter	Search All Details Help		
Navigation 📀	X V Entity	Name	Header
Eield options (93)	8	Solutions	segments
	9	Applications	applications
Field values (54820)	10	Approvals	approvals
Product Class Features (70)	14	Materials	materials
User-defined fields t	16	Lead-Free	Lead-Free
Edit	16	MaterialQuality	Material quality
Autofill	17	Material connection 1	Material connection 1
Modify	18	Material quality connection 1	Material quality connection 1
Delete record(s)	19	Material connection 2	Material connection 2
Сору	20	Material quality connection 2	Material quality connection 2

4. Click on OK; the user-defined field will first be archived:

=		
Are y	ou sure you want to archive 1 user-defined field?	
0	Cancel	

5. Next, filter on Including archive:

🔦 User-defined fields (sub) 📔	Menu View Edit Functions Im	port / Export 🔷 » U
Filter	Search All Details	,
S Eilter	X V Entity	Name
	8	Solutions
Including archive	9	Applicati
	10	Approval
99 calculated yes	14	Materials
single of mutiple choice	16	Lead-Fre
Manage filters	16	Material

6. Again, select the archived user-defined field and, under Edit, click on *Delete record(s)*:



i	Are you sure you want to <mark>delete</mark> 1 user-defined field?	
D	OK Cancel	
ic		
DI		
ic		

7. Click on *OK* to permanently delete the user-defined field.

Important: User-defined fields that have been mapped to (ETIM) classification features can only be deleted after their mapping has been *removed*.

# 7 Appendix A: Types of user-defined fields

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

Integer	~
Text	
Integer	
Yes or No	
Price	1
Decimal	H
Single choice	
Multiple choice	1
Multi-line text	E I
Image	
Date	
Time of day	H
Range	
GTIN	
Percentage	
Table value	
Matrix	
Selection list	
GUID	

## 7.1 Text

**Use**: The Text UDF can be used for unformatted text values. **Data types allowed**: 256 alpha-numeric characters





Wijzigen		
User def field Expressi	on Tooltip (en) Memo Translations	
Name		
Sequence		
Туре	Text 🗸	
Label		
Header		
Field chapter		- 🗙
Style		
Max length	500	
Suffix		
Special		
Default value		
Required	◯ Yes ● No	
In quick filter	🔿 Yes 💿 No	
Translatable	🔿 Yes 💽 No	
Calculated	● Yes ○ No	
Summable	O Yes 🔍 No	
Is copy allowed	● Yes ◯ No	
Mobile interface	🔾 Yes 💿 No	
ShowMembers	🔾 Yes 💿 No	
Application feature		
	Add next record Check expression S	Save record Cancel

### 7.1.1 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.

### 7.1.2 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:





Yes or No	In control box		
User def field	Expression Tooltip (e	n) Memo Translations	
Name	•	UDF_Combined_Texts	
Normalized name	\	UDF_Combined_Texts	
Sequence	1		
Туре	\	Text V	
Label	\		
Header	\		
Field chapter	\	▼ 🕷	
Style	\		
Max length	\		
Suffix	\		
Special	\		_
Default value	\		
Required	\	🔿 Yes 🖲 No	
In quick filter		⊖ Yes ● No	
Translatable		⊖ Yes ● No	
Calculated		es O No	
Summable		🔾 Yes 🖲 No	
Is copy allowed		● Yes ○ No	
Mobile interface		O Yes 🖲 No	-
		Add next record Check expression Save record Cance	

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

Tes or NO III COULOD DOX	
📄 Wijzigen	
User def field Expression Tooltip (en) Memo Translations	
🔁 🐡 Ω - 🐇 🖻 🕙 - 🗠 - 🖏 🥵 🛍 🧶	
- B I 型 abs   臣 吾 言 ■ ■   x <sup>2</sup> X    = 🏡 ৈ 律 詳 註 註 🔯 😣 🚷 ("Myriad Pro",▼ 1	Зрх
📓 🖀 🖉 Θ 💌 Insert field 📲 💷 🗄 🚆 🚟 🔠 📑 📋 💷 🗄 🗚 🗹	
CONCAT([ItemRecord.Description/]," is in assortment ",[ItemRecord.ItemSetDescription/])	
	_
Add next record Check expression Save record Cancel	

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

	OPPLE Li	ghting 14	0043899 L	EDPanelRc-G	Sq598-3	86W-3000-WH-C	т		LEC	) E T5 ba	tten 1200				ι.			
	Drawing	) Alter	matives	Accessorie	s \ O	rder informatio	ı T P	Price history	Surch	arge	Attachment	s User-	-defined fie	Ids 💽 1	ι.			
	UDF_Combi	ned_Texts			LEI	OPanelRc-G Sq59	8-36W	-3000-WH-CT	is in asso	ortment C	OPPLE Lighting			1	ι.			
	Product In control b	ox			(I) No									1	L.			
	Length				2 1	leter								1	L.			
	Length (imp Surface are:	erial) a (calculat	ed)		78.	.74 Inch 113 Square mete	r							1	L. 			
Ш															$\diamond$			
on:	catena t <b>ax</b>	te (co	mbine	e) two o	r mo	ore text st	ring	ls.										
С	ONCAT	(ctri	·· ~1		_													
			ngı,	strin	g2,	etc)												
) Para	meter	s s	.ng⊥,	strin	g2,	etc)									$\diamond$	$\diamond$	$\diamond$	
) Para	imeter	s	.ng⊥,		g2,	etc)								<ul><li>○</li><li>○</li></ul>	<ul><li>○</li><li>○</li></ul>	<ul><li>○</li><li>○</li></ul>	0 0	0 0
⊃ara ⊃	imeter	s o	.ngı,		g2,	etc)	$\diamond$	<ul><li>○</li><li>○</li></ul>	$\diamond$	$\diamond$	<ul><li>○</li><li>○</li></ul>	$\circ$ $\circ$ $\circ$	$\diamond$	<ul> <li></li> &lt;</ul>	<ul><li></li><li></li><li></li></ul>	<ul><li>○</li><li>○</li></ul>	<ul> <li></li> &lt;</ul>	0 0 0



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"
```

# 7.2 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>

Wijzigen         User def field       Tooltip (en)       Memo       Translations         Name       UDF_Yes_or_No       Image: Sequence       Image: Sequence <td< th=""><th>Yes or No In control box</th><th></th><th></th></td<>	Yes or No In control box		
User def field       Tooltip (en)       Memo       Translations         Name       UDF_Yes_or_No       Image: Sequence       Image: Seque	Wijzigen		
Name       UDF_Yes_or_No         Sequence	User def field Tooltip (en) Memo	Translations	
Sequence   Type   Type   Yes or No   Label   Header   Field chapter   Style   Style   Suffix   Special   Default value   Required   Yes ● No   Summable   Style ③ Yes ● No   Is copy allowed   Mobile interface	Name	UDF_Yes_or_No	ר כ
Type     Yes or No       Label       Header       Field chapter       Style       Style       Special       Default value       Required       O Yes ● No       Summable       Style ③ No       Is copy allowed       Mobile interface	Sequence		
Label  Header  Field chapter  Style  Style  Special  Required  In quick filter  Summable  C Yes  No  Is copy allowed  Mobile interface  Yes  No	Туре	Yes or No 🗸	
Header Field chapter Field chapter Style Suffix Special Default value Required In quick filter Summable Is copy allowed Mobile interface Yes  No	Label		
Field chapter   Style   Suffix   Special   Default value   Required   In quick filter   Summable   Cyse © No   Is copy allowed   Ø Yes © No   Mobile interface   O Yes © No	Header		
Style       Suffix       Special       Default value       Required       Yes       No       In quick filter       Summable       Is copy allowed       Ø Yes       No       Mobile interface	Field chapter		
Suffix Special Sefunction of the set of the	Style		
Special       Default value       Required       In quick filter       Yes INO       Summable       Yes No       Is copy allowed       Is Yes No       Mobile interface	Suffix		
Default value Required QYes  No In quick filter Yes  No Summable Yes  No Is copy allowed Yes  No Mobile interface Yes  No	Special		
Required     Yes ® No       In quick filter     Yes ® No       Summable     Yes ® No       Is copy allowed     @ Yes © No       Mobile interface     Yes ® No	Default value		
In quick filter     Yes <ul> <li>Yes              <li>No</li> </li></ul> Summable     Yes <ul> <li>Yes              <li>Yes              <li>No</li> </li></li></ul> Is copy allowed <li>Yes              <li>No</li>         Mobile interface     Yes       No</li>	Required	⊖ Yes ● No	
Summable     Yes INO       Is copy allowed     Yes No       Mobile interface     Yes INO	In quick filter	🔾 Yes 🖲 No	
Is copy allowed         ● Yes ○ No           Mobile interface         ○ Yes ● No	Summable	○ Yes    No	
Mobile interface O Yes O No	Is copy allowed	● Yes ○ No	
	Mobile interface	○ Yes    No	
ShowMembers O Yes O No	ShowMembers	○ Yes <sup>●</sup> No	
Application feature	Application feature		
Add next record Check expression Save record Cancel	Add next reco	rd Check expression Save record Cancel	

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

### 7.3 Price

**Use**: The Price UDF is used for any type of price; gross price, net price, etc. **Data types allowed**: Numeric (currency)





Wijzigen	.D. CONTOL DOX	
User def field Tooltip (	en) Memo Translations	
Name		
Sequence		
Туре	Price 🗸	
Label		7
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

# 7.4 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.

					E Wi	izigen		In control	hox												
					Us	er def field	Tooltip	(en) Me	emo 🔪 Tra	nslations											
					Name				U	)F_Decimal											
					Norma	alized name			UD	F_Decimal											
					Seque	ence															
					Туре				D	ecimal		~			_						
					Label																
					Field	er Shanter															
					Chulo	liapter									•••						
					Numb	er notation			St	andard					~						
					Suffix																
					Unit				M	TR Meter				•	- 🗶						
					Imper	ial			FC	IT Foot					- 🗶						
					Speci Defau	<b>al</b> It value															
					Requi	red			C	Yes 🖲 No											
					In qui	ck filter			C	Yes 🔍 No											
					Calcul	ated			0	Yes 🔍 No											
					Sumn	nable w.allowed			0	Yes No											
					Mobile	e interface			C	Yes O No											
					Show	Members			С	Yes 🖲 No											
					Applic	ation feature	2									Ţ					
									Add next r	ecord C	heck expre	ssion	Save reco	rd	Cancel			$\diamond$	$\diamond$	$\diamond$	
																	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\bigcirc$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			- 32		



# 7.5 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.

📄 Wijzigen		
User def field Tooltip (en)	Memo Translations	
Name	UDF_Single_Choice	
Normalized name	UDF_Single_Choice	
Sequence		- 1
Туре	Single choice V	- 1
Label		- 1
Header		- 1
Field chapter		- 1
Style		- 1
Parent field	- ×+	- 1
Suffix		- 1
Unit		- 1
Special		- 1
Default value		
Required	○ Yes ● No	
In quick filter	○ Yes <sup>●</sup> No	- 1
Summable	○ Yes ● No	
Is copy allowed	● Yes ○ No	- 1
Mobile interface	○ Yes ● No	
ShowMembers	○ Yes ● No	- 1
Application feature		
	Add payt record Chack expression Source record Conta	<b>▼</b>
	Add next record Check expression Save record Cance	el

### 7.5.1 Field options

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

- Single choice
- Multiple choice

<u>Note</u>: 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 **7.15 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*:





🔦 User-defined fields (sub)	Menu View	Edit Functions Import / E	xport > User def fields	type:Products
Filter	Search All	Details Manage screen layouts Help	•	
Navigation	Archived	Name	т	Label
- Field Onlines (0)		UDF_Bottle_Volume	Integer	Bottle content
- Field Options (0)		UDF_Colour_White	Single choice	Colour white RAL variants
Field Values (0)		UDF_In_Control_Box	Yes or No	In control box
Wuser def fields type:		UDF_Length	Decimal	Length
		UDF_Single_Choice	Single choice	Single choice
Edit		UDF_Solar_Yield	Decimal	Solar yield
Add		UDF_Surface_Area	Decimal	Surface area (calculated)
Modify		UDF_imperial_metric_integer	Integer	UDF_imperial_metric_integer
Delete record(s)		UDF_Novel	Yes or No	UDF_Novel

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

Field Options Menu View	W Edit Functions Import / Export » User def fields type:Produ
2.	
Including archive	Search All Details Manage screen layouts Help
Navigation 🛞	Archived Index Label
Field Values	
User def field:Single	
User def fields type:Products	
Edit 🛞	
Add	
Modify	

3. In the pop-up window:

Option field Tooltip (en)	Translations	
index	1	
orting	1	
abel	Choice option 1	
Value	Cotton white	
Numeric value		
Image	]	
External code		
Links		
Site URL		
Video URL		
	Add next record Save record	Cancel

- a. **Index**: The index number is automatically increased and uniquely identifies the field option. It is recommended to use the generated index.
- b. 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.

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- 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. <u>Note</u>: 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.

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

🔦 User-defined fields (sub)	) Menu View Edit Functions In	nport / Export > User def f	ields type:Products
▶.		<li>⊘ .</li>	
Filter	Search All Details Manage screen layou	its Help	
Navigation	Archived Name	т	Label
- Field Options	UDF_Bottle_Volume	Integer	Bottle content
- rield Options	UDF_Colour_White	Single choice	Colour white RAL variants
Field Values (6)	UDF_In_Control_Box	Yes or No	In control box
User def fields type:	UDF_Length	Decimal	Length
	UDE Single Chaice	Single choice	Single chaice

Figure 2. UDF\_Length has been filled out for 6 products



Figure 3. The 6 products for which UDF\_Length has been filled out.

### 7.6 Multiple choice

**Use**: The Multiple choice UDF can be used to create a multiple choice drop-down list. **Data types allowed**: Alphanumeric

<u>Note</u>: The field options (choices) for a Multiple choice UDF need to be created separately, see paragraph **7.5.1** FIELD OPTIONS.





User def field Tooltip (er	) Memo Translations		
Name	UDF_Multiple_Choice		2
Normalized name	UDF		
Sequence			
Туре	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 payt record Chack expression Save record	Canaal	

### 7.7 Multi-line text

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





User def field Tooltip (en)	Memo Translations		
Name	UDF_Multi-line_text		<b>^</b>
Sequence			
Туре	Multi-line text	<mark>~</mark>	
Label			
Header			
Field chapter			- 🗙
Style			_
Max length	4000		
Suffix			
Special			
Default value			
Required	⊖ Yes ♥ No		
In quick filter	⊖ Yes ♥ No		
Translatable	O Yes ♥ No		
Calculated			
Summable			
is copy allowed			
Mobile interface			
Application foature	U Yes VNO		
Application reature			

### 7.7.1 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.

### 7.7.2 HTML

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

# 7.8 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.





User def field Tooltip (en)	Memo Translations		
Name	UDF_Image		<b>^</b>
Normalized name	LIDE Image		
Sequence			
Туре	Image	<b>~</b>	
Label			
Header			
Field chapter		- \$	8
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	ancel

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

	Edit - 140	043898 LEI	D E T5 BAT	TEN 600 9	W 800LM	3000К СТ (	(langer) Op	ople 06956	712666215	5					•			
	Ion ↓ N	1odel 🔪 C	Commerci	al descript	ion (prod	uct) (en)	Techni	cal descrip	otion (pro	duct) (en)	Additi	onal l	Jser-defin	ed fields				
U S U	JDF_imperia Solar yield Single choice JDF_Image	l_metric_ir	nteger		12		×	leter iolar panel	yield per s	urface area	3							
	JDF_Date Bottle conter JDF_Novel Colour white Aanvullend n control bo .ength .ength (impe	it RAL varian <b>e product</b> x erial)	nts informati	e		/Data/Er Yes O No 1 Yes O No 10	Vironmeni UL L Unknow	ts/000003/ iter m Meter	<mark>Attachmer</mark>	nt/Bijlage/	98159.jpg							
S	Surface area	(calculated	d)		472.	.44 0 Square n	neter	ich 💶 Auto	matic						▼ F>			
						Edit	the previ	ous one	Edit the ne	ext one	Save r	record	0	ancel	F F			
()	$\sim$	$\overline{}$	$\sim$			$\overline{}$	$\overline{}$	I ENBanell	Dr.C \$450	8-	$\sim$	$\sim$		$\sim$	-3			
				Figui	re 4. Im	age dai	tafield v	vhich is	added	to the	entity							
															$\diamond$	$\diamond$	$\diamond$	
														$\diamond$	$\diamond$	$\diamond$	$\diamond$	(
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				(
$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$			38		



# 7.9 Date

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

Edit - UDF_Date		C
User def field Tooltip (en)	Memo Translations	
Name	UDF_Date	
Normalized name	UDF Date	
Sequence		
Туре	Date 🗸	
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 o	Here Here Here Here Here Here Here Here	Cancel





### Data types allowed: Date/time

Integer Dotte	e content	
📄 Wijzigen		
User def field Tooltip (en)	Memo Translations	
Name	UDF_Time_of_day	
Sequence		
Туре	Time of day	
Label		
Header		
Field chapter	▼ X	
Style		
Suffix		
Special		
Default value		- 1
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	



7.11	Range
------	-------

	Use: 1 Data t	The Ra <b>ypes</b>	ange L allowe	JDF ca ed: Nu	an be i imeric	used fo (decir	or any nal)	range	of de	cimal ı	numbe	ers.					
	Note:	O The ra	ange L	O IDF ca	n be u	o used w	/ith me	o etric ar	nd imp	o erial u	onits.						
																$\diamond$	
$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\circ$	$\circ$	$\bigcirc$	$\bigcirc$	$\circ$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	

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📄 Edit - UDF_Range		
User def field Tooltip (en) Memo	Translations	
Name	UDF_Range	^
Normalized name	UDF_Range	
Sequence		
Туре	Range 🖌	
Label		
Header		
Field chapter	<b></b>	*
Style		
Suffix	This is a suffix	
Unit	MTQ Cubic meter	*
Imperial	FTQ Cubic foot	*
Special		
Default value	500	
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 on Edit the	e next one Check expression Save record	Cancel

## 7.12 GTIN

**Use**: The GTIN UDF can be used to add a GTIN number. **Data types allowed**: GTIN number





Name UDF_GTIN Normalized name UDF_GTIN Sequence  IType GTIN Label Label Label Label Leader Field chapter Style Sty	User def field Tooltip (e	n) Memo Translations	
Normalized name UDF_GTIN   Sequence	Name	UDF_GTIN	i i i i i i i i i i i i i i i i i i i
Sequence   Type   GTIN   Label   Label   Header   Field chapter   Field chapter   Style   Suffix   Suffix   Special   Default value   Required   No   In quick filter   Summable   Stopy allowed   Mobile interface   ShowMembers   Application feature	Normalized name	UDF_GTIN	
Type       GTIN       ✓         Label       ✓       ✓         Header       ✓       ✓         Field chapter       ✓       ✓         Style       ✓       ✓         Style       ✓       ✓         Suffix       ✓       ✓         Special       ✓       ✓         Default value       ✓       ✓         Required       ✓ Yes ● No       ✓         In quick filter       ✓ Yes ● No       ✓         Summable       ✓ Yes ● No       ✓         Is copy allowed       ④ Yes ● No       ✓         Mobile interface       ✓ Yes ● No       ✓         ShowMembers       ✓ Yes ● No       ✓         Application feature       ✓       ✓	Sequence		
Label   Header   Field chapter   Style   Suffix   Special   Default value   Required   Yes ● No   In quick filter   Summable   Is copy allowed   ● Yes ● No   ShowMembers   Ores ● No   ShowMembers   Ores ● No	Туре	GTIN	
Header   Field chapter   Style   Suffix   Special   Default value   Required   Yes ● No   In quick filter   Summable   Is copy allowed   Ø Yes ● No   ShowMembers   Application feature	Label		
Field chapter   Style   Suffix   Special   Default value   Required   Yes ● No   In quick filter   Yes ● No   Summable   Is copy allowed   Mobile interface   Yes ● No   ShowMembers   Application feature	Header		
Style       Suffix       Special       Default value       Required       No       In quick filter       Yes  No       Summable       Is copy allowed       Mobile interface       ShowMembers       Application feature	Field chapter		- 🗙
Suffix       Special       Default value       Required       1 quick filter       Summable       2 copy allowed       Mobile interface       ShowMembers       Application feature	Style		
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       Yes  No	Suffix		
Default value       Required       In quick filter       Yes          No       Summable       Is copy allowed       Mobile interface       Yes          No       ShowMembers       Application feature	Special		
Required       Yes <ul> <li>Yes        <li>No</li> <li>Summable</li> <li>Yes        <li>No</li> <li>Is copy allowed</li> <li>Yes        <ul> <li>Yes              <li>No</li> </li></ul>            Mobile interface         Yes              <ul> <li>Yes              <li>No</li> </li></ul>            ShowMembers         Yes              <ul> <li>Yes              <li>No</li> </li></ul>            Application feature         Image: No         Image: No</li></li></li></ul>	Default value		
In quick filter     Yes <ul> <li>Yes              <li>No</li> </li></ul> <li>Summable</li> <li>Yes              <li>No</li> <li>Is copy allowed</li> <li>Yes              <li>Yes              <ul> <li>Yes              <li>No</li> </li></ul> </li> <li>Mobile interface</li> <li>Yes              <ul> <li>Yes              <li>No</li> </li></ul> </li> <li>ShowMembers</li> <li>Yes              <li>No</li> </li> <li>Application feature</li> </li></li>	Required	🔿 Yes 🖲 No	
Summable     Yes  No       Is copy allowed     Yes No       Mobile interface     Yes  No       ShowMembers     Yes  No       Application feature     Image: Show Show Show Show Show Show Show Show	In quick filter	🔾 Yes 🖲 No	
Is copy allowed        Is copy allowed        • Yes        • No         Mobile interface        · Yes        • No         ShowMembers        · Yes        • No         Application feature	Summable	🔿 Yes 🖲 No	
Mobile interface     O Yes <ul> <li>No</li> <li>ShowMembers</li> <li>O Yes              <li>No</li> </li></ul> Application feature     Image: Comparison of the second	Is copy allowed	● Yes ○ No	
ShowMembers O Yes  No Application feature	Mobile interface	🔿 Yes 🖲 No	
Application feature	ShowMembers	🔿 Yes 🖲 No	
	Application feature		
		Add next record Check expression Save record	Cancel

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

					Error	savin	9		_					×						
						Entr digi	y for fi t) of '12	eld 'UE 234567	0F_GTIN 890123	l' is wro 3' has ti	ong. Th o be 8.	e chec	k digit	(last	ut					
						C	)K													
						~	~	~	~			~	~	~						
	7.13	Pe	rcen	tage	$\diamond$															
	Use: T Data t	he Pe <b>ypes</b>	ercenta allowe	age UI <b>ed</b> : Pe	DF cai rcenta	n be u age (de	sed to ecimal	add a l)	perce	entage	$\diamond$						$\diamond$	$\diamond$	$\diamond$	
																$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
>	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$
>	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			42		



FlowCharacteristic	FIOW	unaracterístic	Single choice	18 5	057
📄 Wijzigen					
User-defined field	Tooltip Memo T	Translations			
Name		UDF_Percentage			<b>^</b>
Sequence					
Туре		Percentage	~		
Label					
Header					
Field chapter					- *
Additional					
Default value					
Number notation		Standard		~	
Application feature		Standard			
		No decimal places (0)			
Required		1 Decimal (0.0)			
In quick filter		2 Decimal (0.00)			
Calculated		Three decimal places			
Summable	(1)	Ves Vo			
Is copy allowed		● Yes ○ No			
ShowMembers		🔾 Yes 🖲 No			
		Save and ne	w Check expression	Save and close	Cancel

**Number notation**: Set the number of decimals to be used for the percentage. <u>Note</u>: For screen layouts the number of decimals can be set at the properties of the field in the Field selector.

# 7.14 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 🔿	၀	17	63	○ 2 ○
108	0	20,2	77	2
22 28 35 42 54 66,7 76,1 88,9 108		8 8,2 9,8 9,7 13,6 14,8 17 20,2	21 23 26 30 35 50 55 63 77	1,5 1,5 1,5 1,5 1,5 1,8 2 2 2



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

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

# 7.15 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.

### 7.15.1 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:

![](_page_43_Figure_16.jpeg)

![](_page_44_Picture_0.jpeg)

User-defined fields (main)	Menu View	
· □ ·		🗾 🔹
Filter	Search All M	anage screen layouts Help
Navigation 🛞	Image	Description
User-defined fields		<u>#CostCenter</u>
		Assortments
	B	Attachment types
	0	Attachments
		Bonus specifications
		Calculation Lines
		Calculations
		Contact persons
		Contacts

3. Under Edit, click on +Add:

![](_page_44_Picture_3.jpeg)

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

![](_page_44_Figure_5.jpeg)

![](_page_45_Picture_0.jpeg)

User def field Tooltip (er	n) Memo Translations	
Name	UDF_Role	
Normalized name	UDF Role	
Sequence		
Туре	Multiple choice	
Label	Roles	
Header	Roles	
Field chapter	Automatic	- *
Style		
Parent field		- *+
Suffix		
Unit		- *
Special		
Default value		
Required	○ Yes ● No	
In quick filter	○ Yes	
	Add next record Check expression Save record	Cancel

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

### 7.15.2 Add (multiple) choice list options

Create the list options:

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

![](_page_45_Picture_9.jpeg)

2. Under Edit, use the +Add button to add all list options:

![](_page_45_Picture_11.jpeg)

![](_page_46_Picture_0.jpeg)

Add - New option field to user de	f field Roles		•
Option field Tooltip (en)	Translations		
Index	1		<u>^</u>
Sorting	1		
Label	Contractor		
Value	Contractor		
Numeric value	1.00		
Image			
External code			
Links			
Site URL			
Video URL			
	Add next record	Save record	Cancel

- 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. <u>Note</u>: 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*. <u>Note</u>: When entering the value, *do not* use spaces and punctuation marks. E.g.: at\_night
  - Numeric value: In certain situations, an (alphanumeric) value cannot be handled properly. In that case, specify a *numeric value* here as well. <u>Note</u>: Choose a *unique* number for each option.

### 7.15.3 Set roles

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

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

			Contac	ts M	1enu	View	Edit	Fun	ctions	Print	Imp	ort / Exp	port						
			Contacts	Produ	cts If	tems	DAM-	Classifi	- cation	System	My det	tails H	🧿 🖕	Logout					
			Navigat	ion			۲	▲ A	rchived	ΙT	Full nar	me							
			Cor	tact per	sons					an a	Compan	o BV							
				reader per	00110		_			. <del></del>	Duco Ve	ntilation	& Sun C	ontrol					
			Mer	mo (0)						r.	Heering	Kunststo	of profiel	en BV					
			Atta	achment	s (0)					-m	Ideal Tri	don			$\sim$				
				anizatio	n-Heeri	na				- m	nits								
				101112000						-m -	OPPLE L	ighting			$\circ$				
			Edit				۲	>		ß	Arie Buc	her (Hee	ering)		$\diamond$				
∕2.	Sele	ect a	contact	and, u	Inder	Edit, o	click o	n <i>Mod</i>	lify:							$\diamond$	$\diamond$	$\diamond$	
															$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$								
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			47										

![](_page_47_Picture_0.jpeg)

Contacts Menu View	Edi	t Fun	ctions	Print	Import / Export	
▶.		- 🤇		1		?.
Filter		Search	All	Details	Manage screen layouts	Help
Navigation	۲	▲ A	rchived	Т	Full name 🔶	
				<u></u>	the state of the state of the	
Edit	۲			. <del></del>	Compano BV	
Organization				. <del></del>		
Contact person		× .		12		
				<b>.</b>	and the second second	- N
Modify				<b>.</b>		
Delete record(s)						

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

Contact person	Organization Private Person	Location Depart	tment Memo	User-defined fields								
Contact												
Roles	Contractor Tiler											
		=1		elopei								
	Edit the previous on	Edit the next one	Save record	Cancel								

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

### 7.15.4 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):

						Item se	arch	Menu 🔪	View	Edit	Function	ns Prin	t \Imp	ort / Exp	ort						
						Contacts	Products	Items	DAM.	Classifi	cation	System	🥹 🖕	Help	Logou						
						Navigati	on		۲	^ A	rchived	💮 Back	ground ta	isks							
						Prod	uct:14004	13899 LED.				Conf	iguration								
							, ,		©			A Layo	outs								
						Function	5		۲		_		;								
						Gen	erate item	sheet				User	-defined f	ields (mai	in)						
						Sale	s Items »					User User	5			$\circ$					
		2.	In th	ne list,	click	on the	link <u>P</u>	rojects:	$\diamond$												
																		$\diamond$	$\diamond$	$\diamond$	
																	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$							
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			- 48									

![](_page_48_Picture_0.jpeg)

User-defined fields (main)	Menu View		
Filter	Search Al	Manage screen layout	s Help
Navigation	A Ima	ge Description Products	
User-defined fields		Project monitori	19.
	- AND	Project specific r	naterials
		<u>Projects</u>	
		Publicatio podes	

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

🔦 User-defined fields (sub)	Menu View Edit Functions	Import / Export >
2.		. 🕜 .
Including archive	Search All Details Compan	o Help
Navigation 🛞	Archived V T	Name
<pre></pre>		
Field Values		
User def fields type:		
Edit		
Add		
Modify		

4. In the pop-up window:

				🗐 Edit -	Contractor										_					
				User	def field	Picklist	Tooltip (er	) Memo	Transl	ations										
				Name				UDF_	Contractor						<b>^</b>					
				Normaliz	ed name			UDF_C	ontractor											
				Sequence	e															
				Туре				Selec	tion list		~									
				Label				Contra	actor					_						
				Header				Contra	actor					Automati	c					
				Overview	pter ,			Canta												
				Chala				Conta	ct person											
				Suffix																
				Special																
				Default v	alue															
				Required				Over	s 🔘 No							$\sim$				
				In quick f	filter			⊖ Yes	s 🔍 No											
				Summab	le			⊖ Yes	s 🔘 No											
				Is copy a	llowed			🔘 Yes	s O No							$\bigcirc$				
				Mobile in	terface			⊖ Yes	s 🔍 No											
				ShowMer	mbers			⊖ Yes	s 🔍 No						_ 11	$\sim$				
				Applicatio	on feature											$\sim$				
						Edit the pr	evious on	Edit the n	ext one	Check exp	ression	Save rec	cord	Cance						
				$\sim$	$\overline{}$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$		$\diamond$	$\diamond$	$\diamond$	
			User	def fie	eld tab	$\sim$										~	$\sim$	~	~	~
																$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\bigcirc$
5	$\circ$	$\circ$	$\bigcirc$	$\bigcirc$	$\bigcirc$	$\circ$	$\circ$	$\sim$	$\circ$	$\circ$	$\circ$	$\bigcirc$	$\sim$	$\bigcirc$	$\bigcirc$	$\bigcirc$				~
	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$		40		$\sim$
>	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			49		
	~	-	~	~	~	<u> </u>	~	~	<u> </u>	~	~	~	~	~	<u> </u>					

![](_page_49_Picture_0.jpeg)

- a. Name: Type a name for the user-defined field.
- b. **Type**: Select the option Selection list.
- c. Label: Type a label name.d. 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:

User def field	Picklist Tooltip (er	n) 🔪 Memo 🔪 Trans	slations		
Roles	= value	✓ Contract	or	□Tiler □Project developer	
	Edit the previous on	Edit the next one	Chack expression	Save record	Cancel

- 6. Click on Save record.
- 7. 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:

🔦 User-defined fields (sub)	Menu View Edit	Functions Import / Export	»User def fields type:Pr	ojects		
2.	- 🔍 🔲	i . ? .				
Including archive	Search All E	etails Selection list Help				
Navigation 🛞	Name	т	Label	Application	Picklist	Entity
	UDF_Contractor	Selection list	Contractor		with roles: contractor	PRJ.Project
- Field Options						
Field Values (0)						
	1					

### 7.15.5 Using a selection list

To see the resulting selection list:

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

							User-defined fields (sub)       Menu       View       Edit       Funct         Image: Contacts       Sales       Projects       Purchase       Products       Items       DAM       Sales         Navigation       Image: Contractor       Items       DAM       Sales       Projects       Projects       Projects       Items       DAM       Sales         Image: Field Options       Image: Projects       Projects       Image: Projects       Items       DAM       Sales         Image: Field Values (0)       Image: Projects       Image: Pro														
		2.	Мос	dify (or	Add)	a (nev	v) proj	ect:													
																		$\diamond$	$\diamond$	$\diamond$	
																	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				$\diamond$							
$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$			50									

![](_page_50_Picture_0.jpeg)

Projects Menu	View Edit	Functions	Print		
▶.	•		<ol> <li>.</li> </ol>	).	
Filter		Search All	Details Demo Help	0	_
Navigation	۲	▲ No.	Calculation type	Status	Description
		PR22000001	Fixed Price	Open	Test project
Edit	۲				
Add					
Modify					

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

![](_page_50_Picture_3.jpeg)

### 7.16 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.

![](_page_50_Picture_7.jpeg)

![](_page_51_Picture_0.jpeg)

User def field Tooltip (en)	Memo Translations	
Name	UDF_GUID	<u> </u>
Normalized name	UDF_GUID	- 1
Sequence		
Туре	GUID 🗸	
Label		
Header		
Field chapter	•	K
Style		
Suffix		
Special		
Default value		
Required	○ Yes <sup>●</sup> No	
In quick filter	🔿 Yes 🖲 No	
Summable	🔿 Yes 🖲 No	
Is copy allowed	● Yes ○ No	
Mobile interface	○ Yes   No	
ShowMembers	○ Yes	
Application feature		
		-

<u>Note</u>: 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.

![](_page_51_Figure_3.jpeg)

![](_page_52_Picture_0.jpeg)

# 8 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*.

📰 Wijzigen		
User def field Tooltip (en)	Memo Translations	
Name	UDF_Main_colour	i i i i i i i i i i i i i i i i i i i
Normalized name Sequence Type	UDF_Main_colour	
Label	Main colour	
Header	Main colour	Automatic
Field chapter		
<b>Style</b> Parent field		- *+
Suffix Unit		
Special		
	Add next record Check expression	Save record Cancel

2. Next, create the main colour options:

		I	Field	<b>Option</b>	s Me	nu V	iew E	idit F F	unctions	Imp	pe								
			lavigatio	<b>n</b> Values (0	)	۲	▲ /	Archived	l I	ndex La 1 Wh 2 Gra	bel ite iy								
			User	def field:I def fields	Main c type:Pro	ducts				3 Bla	ck				0				
3.	Nov	v, crea	ate a n	ew sir	igle ch	ioice L	JDF fo	r the L	Detail (	Colour	$\diamond$								
																$\diamond$	$\diamond$	$\diamond$	
															$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\bigcirc$
>	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$	$\diamond$				C
~	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$	$\sim$			53		

![](_page_53_Picture_0.jpeg)

📄 Wijzigen					
User def field Tooltip (en) Me	mo Translations				
Name	Detail_colour			<b>^</b>	
Normalized name Sequence	Detail_colour				
Туре	Single choice	~		_	
Label	Colour detail				
Header	Colour detail			🗹 Automatic	
Field chapter				- 🗙	
Style					
Parent field	Main colour			▼ ※+	
Suffix					H
Unit				- *	
Special					
Default value				<b>,</b>	
	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	
/alue	Cream white	
Numeric value		
Image		
Parent field option	<mark>▼</mark> ※÷∕	
External code	1 White	
linke	2 Gray	
Site URL	3 Black	
		$\equiv$
Video URL		
	Edit the previous on Edit the next one Save record Cancel	-

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

![](_page_53_Picture_6.jpeg)

![](_page_54_Picture_0.jpeg)

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  🛞	Archived Index Label
Field Values (0)	1 Cream white
	2 Ice white
User def field:Colour	3 Light gray
	4 Dark gray
Solution of the state of the st	

Figure 5. All sub-options for Detail colour.

5. 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:

140043633	00930/12000222	800lm 4000K CT
📄 Edit - 140043898 LED E T5 B/	ATTEN 600 9W 800LM 3000K CT	(langer) Opple 069567126
ion Model Commerce	cial description (product) (en)	Technical descriptior
UDF_Range	12.00	24.00
UDF_Range (imperial)	423.78	847.55
UDF_GTIN		
UDF_Image		
UDF_Time_of_day		III O
UDF_Percentage		%
Main colour	White	<b>~</b>
Colour detail		~
UDF_Selection_List	Croamwhite	
Bottle content	Ice white	
UDE Nevel		

![](_page_54_Picture_5.jpeg)