

How to Create a Custom Field

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Custom Tab Designer**
3. From **Search Custom Field** screen, click **New** toolbar button to open a new **Custom Tab Designer** screen
4. Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

Custom Fields - General Journal

New

Save

Search

Delete

Undo

Build

Close

Details

Screen Name: General Journal Module: General Ledger Tab Name: Custom Layout: 2 Column

Description: Custom Fields for GJ

Field Name	Description
Screen Name	A combo box that will list all the screens in i21.
Module	A read-only field displaying the module the selected Screen belongs to.
Tab Name	The name of the Tab where the custom fields will be displayed.
Layout	A combo box displaying 3 layout options (1 Column, 2 Columns or 3 Columns). This will determine the number of columns the Tab will display.
Description	A detailed description of the custom fields.

Module field is automatically filled with the module parent of the selected **Screen Name**.

5. Select/enter details on the grid (**Control Name**, **Type**, **Action**, **Flex**, and **Location**)

Custom Fields - General Journal

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Details

Screen Name: General Journal Module: General Ledger Tab Name: Custom Layout: 2 Column

Description: Custom Fields for GJ

Fields

Preview

Audit Log (0)

X Remove

Edit List

Up

Down

Layout

Filter Records (F3)

Field Name	Field Type	Field Size	Control Type	Location
<input type="checkbox"/> Test 1	Text	50	Text Box	Column 1
<input type="checkbox"/> Test 2	Integer		Numeric	Column 1
<input type="checkbox"/>				

Control Type is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

Control Name	The name of the custom field that will be displayed as the label.
Type	A combo box displaying a list of Field Types to choose from. This list should include the following: <ul style="list-style-type: none">• Text Box• Text Area• Combo box• Grid• Integer• Decimal• Date• Checkbox
Action	Shows Create/Edit button for combo box and grid types
Flex	Defines how much space the control will take up
Location	A combo box displaying the Layout options. For example, if they user selected 2 Columns layout then the Location combo should list (Column 1 and Column 2). This will determine which column the selected field will be displayed on the tab.

6. Click **Save** toolbar button once done

i Users can preview how the fields will look by going to the **Preview** tab

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3. From **Search Custom Field** screen, click **New** toolbar button to open a new **Custom Fields** screen
4. Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

i **Module** field is automatically filled with the module parent of the selected **Screen Name**.

5. Select/enter details on the grid (**Field Name**, **Field Type**, **Field Size**, **Control Type**, and **Location**)

Field Types can be any of the following:

Field Type
Text
Type
Text
Integer
Decimal
Date
Bit

i **Control Type** is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

6. Click **Save** toolbar button once done

i Users can preview how the fields will look by going to the **Preview** tab

Custom Fields - General Journal

New Save Search Delete Undo Build Close

Details

Screen Name: General Journal Module: General Ledger Tab Name: Custom Layout: 2 Column

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Fields Preview Audit Log (0)

Test 1:

Test 2:

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4. Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

Custom Fields

New Save Search Delete Undo Build Close

Screen Name: Entity Module: Entity Management Tab Name: Custom Layout: 2 Column

Description: Entity Custom Fields

i **Module** field is automatically filled with the module of the selected **Screen Name**.

5. Select/enter details on the grid (**Field Name**, **Field Type**, **Field Size**, **Control Type**, and **Location**)

Custom Fields

New Save Search Delete Undo Build Close

Screen Name: Entity Module: Entity Management Tab Name: Custom Layout: 2 Column

Description: Entity Custom Fields

Fields Preview Audit Log

Remove Edit List Up Down Layout Filter Records (F3)

Field Name	Field Type	Field Size	Control Type	Location
Test 1	Text	50	Text Box	Column 1
Test 2	Integer	Integer	Numeric	Column 1

Field Types can be any of the following:

Type

Text

Integer

Decimal

Date

Bit

i **Control Type** is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

6. Click **Save** toolbar button once done

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Custom Fields**

- From **Search Custom Field** screen, click **New** toolbar button to open a new **Custom Fields** screen
- Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

Custom Fields

New Save Search Delete Undo Build Close

Screen Name: Entity Module: Entity Management Tab Name: Custom Layout: 2 Column

Description: Entity Custom Fields

Module field is automatically filled with the module of the selected **Screen Name**.

- Select/enter details on the grid (**Field Name**, **Field Type**, **Field Size**, **Control Type**, and **Location**)

Custom Fields

New Save Search Delete Undo Build Close

Screen Name: Entity Module: Entity Management Tab Name: Custom Layout: 2 Column

Description: Entity Custom Fields

Fields Preview

Remove Edit List Up Down Layout Filter Records (F3)

Field Name	Field Type	Field Size	Control Type	Location
Text Box	Text	50	Text Box	Column 1
Integer	Integer		Numeric	Column 1

Field Types can be any of the following:

Field Type

Field Size

Filter Records 5 records

Type

Text

Integer

Decimal

Date

Bit

Control Type is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

- Click **Save** toolbar button once done
- Log in as **Admin user**
- Expand **Admin** folder then double click **Custom fields**.
 - If there are existing records, **Search Custom Field** screen will open
 - If there is no existing record, the new **Custom Fields** screen will open
- From **Search Custom Field** screen, click **New** toolbar button to open a new **Custom Fields** screen

Search Custom Field

New Open Selected Refresh Close

Filter Records (F3) 2 records

Screen	Module	Tab Name
Customer	Accounts Receivable	Custom
Vendor	Accounts Payable	Custom

- Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

Custom Fields

New Save Search Delete Undo Build Close

Screen Name: Customer Module: Accounts Receivable Tab Name: Custom Layout: 2 Column

Description: Test Custom Field for Customer

Module field is automatically filled with the module of the selected **Screen Name**.

5. Select/enter details on the grid (**Field Name**, **Field Type**, **Field Size**, **Control Type**, and **Location**)

The screenshot shows the 'Custom Fields' window. At the top, there are tabs for 'Fields' and 'Preview'. Below the tabs, there are input fields for 'Screen Name' (Customer), 'Module' (Accounts Receivable), 'Tab Name' (Custom), and 'Layout' (2 Column). A 'Description' field contains 'Test Custom Field for Customer'. Below these fields is a table with the following columns: Field Name, Field Type, Field Size, Control Type, and Location. The table contains one row with the following values: Test, Text, 50, Text Box, and Column 1.

Field Types can be any of the following:

The screenshot shows a dropdown menu for 'Field Type'. The menu is open, showing a list of options: Text, Integer, Decimal, Date, and Bit. The 'Text' option is selected.

Control Type is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

6. Click **Save** toolbar button once done

1. Log in as **Admin user**
2. Expand **Admin** folder then double click **Custom fields**.
 - a. If there are existing records, **Search Custom Field** screen will open
 - b. If there is no existing record, the new **Custom Fields** screen will open
3. From **Search Custom Field** screen, click **New** toolbar button to open a new **Custom Fields** screen

The screenshot shows the 'Search Custom Field' window. At the top, there are tabs for 'New', 'Open Selected', 'Refresh', and 'Close'. Below the tabs, there is a 'Filter Records (F3)' field with '2 records' displayed. Below this is a table with the following columns: Screen, Module, and Tab Name. The table contains two rows: Customer (Accounts Receivable, Custom) and Vendor (Accounts Payable, Custom).

4. Select values on the header fields (**Screen Name**, **Tab Name**, **Layout**, **Description**)

The screenshot shows the 'Custom Fields' window, identical to the one in step 5. It shows the 'Fields' tab with input fields for 'Screen Name' (Customer), 'Module' (Accounts Receivable), 'Tab Name' (Custom), and 'Layout' (2 Column). The 'Description' field contains 'Test Custom Field for Customer'. Below these fields is a table with the following columns: Field Name, Field Type, Field Size, Control Type, and Location. The table contains one row with the following values: Test, Text, 50, Text Box, and Column 1.

Module field is automatically filled with the module of the selected **Screen Name**.

5. Select/enter details on the grid (**Field Name**, **Field Type**, **Field Size**, **Control Type**, and **Location**)

The 'Custom Fields' window displays a table with the following data:

Field Name	Field Type	Field Size	Control Type	Location
Test	Integer		Numeric	Column 1

Field Types can be any of the following:

The 'Field Type' dropdown menu is open, showing the following options:

- Type
- Text
- Integer
- Decimal
- Date
- Bit

Control Type is automatically filled when a **Field Type** is selected. A **Text** type can be a **Text Box**, **Text Area**, or a **Combo box**.

6. Click **Save** toolbar button once done