

Article Outline	Source Documents'- & other User Defined Fields (UDF's) types and importing Source Documents with Data Import	
Article Date	2019/09/03	
Knowledge Type	Enquiry: General How to	
Knowledge Activity	Configuration	
Application Version	V9.20	
Application Edition	<input checked="" type="checkbox"/> Evolution Standard / Sage 100 Evolution	<input checked="" type="checkbox"/> Evolution Premium / Sage 200 Evolution
Primary Module	Administration	
Secondary Module	Data Import/Export	
Knowledge Source	Incoming Customer Query	

**Description of Enquiry**

This article explains:

- the various tables in which the User Defined Fields (UDF's) are stored and maintained, such as the **\_etbUserHistLink**, **\_btblinvoicelines**, and other tables (as relevant since Evolution version 9).
- How to import source documents with UDF's

**Solution / Details**

Consider the following facts regarding the relevant Evolution database tables that maintains UDF's.

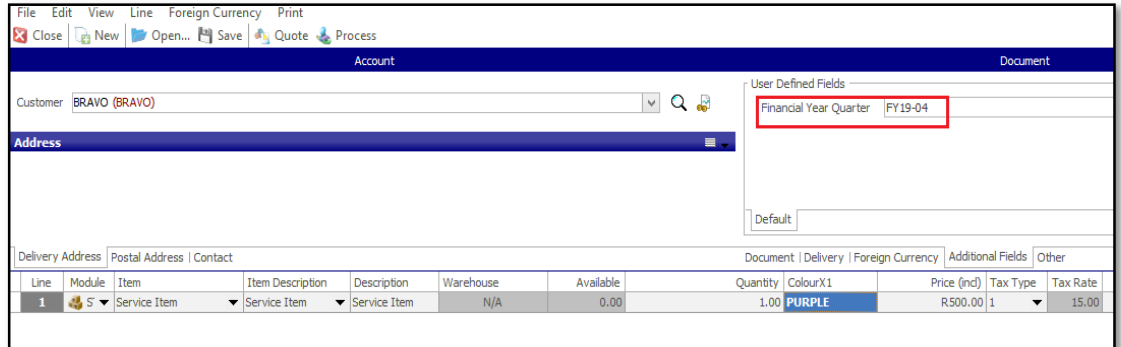
- All UDF records, regardless where in the Evolution company they are used, are maintained in the **\_rtbUserDict** table.
- For example, the UDF record marked below is used on the Inventory Invoice's transaction line.

	idUserDict	cFieldName	cFieldDescription
29	29	uGLSector3	Sector 3
30	30	uGLSector4	Sector 4
31	31	uGLSector5	Sector 5
32	32	uGLSector6	Sector 6
33	33	uGLSector7	Sector 7
34	34	uGLSector8	Sector 8
35	35	uGLSector9	Sector 9
36	36	uGLSector10	Sector 10
37	37	uGLCostCentre	Cost Centre
38	38	ubARIsOrderNumRequired	Order Number Required
39	39	ucDInvTxCMCOLOUR	Colour

Note that these UDF records don't refer to the actual UDF values as entered within source documents or master records. Refer to the rest of the points below for more details on them.

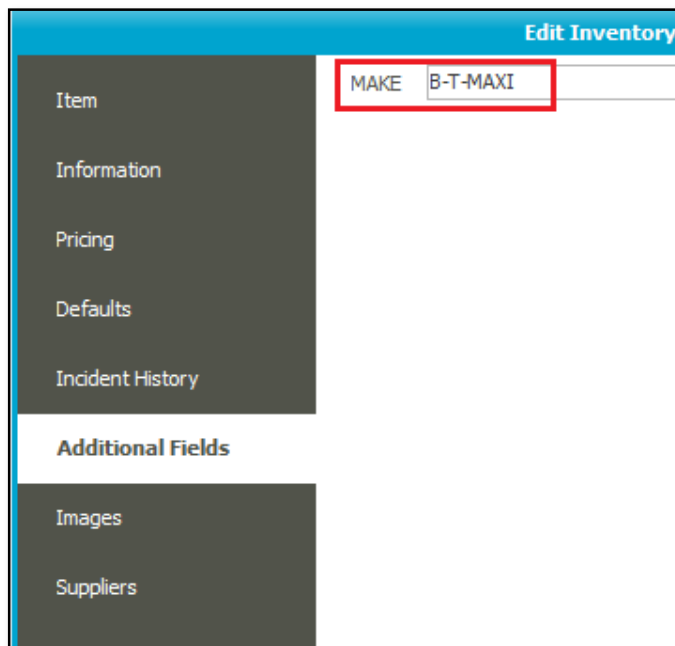
- All UDF values for **Source Document headers** are stored and maintained in the **\_etblUserHistLink** table (no longer in the INVNUM = Source Document Header table as previously the case).

For example, refer to the marked UDF **value** below as entered on the source document header.



- All UDF values for **Source Document Transaction Lines** are stored and maintained in the **\_btblinvoicelines** table.
- All UDF values for all **master records**, e.g. Inventory Item-, Customer-, Supplier- and GL Account records are stored and maintained in the relevant master record tables.

For example, UDF values captured on the **Inventory Maintenance | Additional Fields** screen are maintained in the **STKITEM** table.



**Also note:**

- Customer UDF's are stored in the **Client** table.
- Supplier UDF's are stored in the **Vendor** table.
- GL Account UDF's are stored in the **Accounts** table.

## Relationship connection between the `_etblUserHistLink` table and the `INVNUM` (Source Document header) table.

Especially when you need to import source documents (e.g. invoices, GRV's, Credit Notes, Return to Supplier), making use of the **Data Import** module, the following advice should be considered:

- The Table.Field name relationship between the `_etblUserHistLink` and `INVNUM` tables can be stated as follow:

`_etblUserHistLink.TableID = INVNUM.AutoIndex`

- To explain the above:

The **TableID** value in the `_etblUserHistLink` table is the same value as the **AutoIndex** field on the `INVNUM` table, for the same UDF record/value relationship.

## When importing source documents with UDF values on the header and transaction lines, do the following:

### Data Import Project 1:

For the first import project, use the Document Type = **Source Documents** (as further customised to include your specific fields to be imported) to import the following:

- Document Headers' values
- Transaction Lines' values
- Transaction Lines' UDF values

### Data Import Project 2:

For the second import project, configure a new **Document Type** to import on the `_etblUserHistLink` table to import the **Document Header UDF** values separately.

In this setup, apply the following relationship connection:

`_etblUserHistLink.TableID = INVNUM.AutoIndex`

The **AutoIndex** values are obtained in the company DB's `INVNUM` table, after the first import project is completed, and then used on the second import file to import the Documents' Header UDF values.

**Disclaimer:** *These articles refer to possible solutions and a platform to share information. Each article describes a method that solved a query (knowledge gathered from previous sites) and how Sage Evolution should operate. These articles make reference to a specific Sage Evolution version, however the thought process can be generalised. Please note the information contained in these articles should be treated as guidelines and adapted to accommodate differences in business processes and IT environments. Articles may not be applicable to all environments. If this article did not resolve your query please contact the Sage Evolution Support Department directly on: +86 (0) 112 6837.*