How do I setup a Custom Field?

Products

Sage 300 CRE

Country

North America

Description

- How to setup Custom Fields.
- How do I create a Custom Field?
- Add custom field
- Create custom field
- Set up custom field
- New custom field
- Create a new field
- Add a new field

Disclaimer

Backup Warning

Use caution when working with the below product functionality. Always create a backup of your data before proceeding with advanced solutions. If necessary, seek the assistance of a qualified Sage business partner, network administrator, or Sage customer support analyst.

Resolution

Refer to the considerations below to create custom fields in order to link/provide similar filtering criteria for master file fields such as jobs, employees, vendors, or accounts.

1. Make a backup of the **TIMBERLINE OFFICE\9.5\Accounting\Dict** folder on the server.
2. Open the Application that contains the record to which you want to add the Custom Field.
3. Select **File**, **Company Settings**, **Custom Fields**.
4. Select the **Available Record** that to which you want to add a custom field.
5. Click **Edit**.
6. Click **Add**.
7. Type a **Description** and make the appropriate selections to set up the custom field.
8. Click **OK**.
9. Click **No** to upgrade your files.
   Note: **Upgrade Files** should be performed at the server, not from a workstation.
10. Custom fields will not be available until the files are upgraded. Follow these steps to upgrade the data files on the server:
    1. Make a full backup of the company data folder.
    2. On the server, open the software and, if prompted, select the company data folder to which the custom field was added.
    3. Select **Tools**, **Upgrade Files**.

        - From **Sage Desktop**:
            - Versions 16.1 and newer: **Applications**, **Common Tasks**, **Tools**, **Upgrade Files**.
            - Versions 15.1 and older: **Tasks**, **Sage 300 Construction and Real Estate**, **Common Tasks**, **Tools**, **Upgrade Files**.
        - From **TS Main**, **Tools**, **Upgrade Files**.
    4. If you made a backup, select **Yes** to the backup question.
    5. Leave the **Upgrade files in** selection as **Current data folder**.
    6. Mark the **Force file upgrades** box.
    7. From the list of files, select the file to which the custom field was added.
    8. Click **Start**.
    9. You will be prompted to select a **Save in** location and **File name** for the Upgrade files journal. Make note where you save this printout and the name as you will need to access it in the next steps.
    10. You can view the **Background Tasks** to watch the progress.
    11. When it is complete, from the **File** menu, select **Printouts**. Browse to the location where you saved the journal, select it and click **Open**.
    12. Review the journal for any errors. Contact Sage 300 CRE Customer Support if you would like assistance reviewing the journal or need help with the errors.
11. Once the file is properly upgraded to include the new custom field, you may begin using it.

Additional information

Note: A maximum of 250 custom fields for each record is allowed. The contents of each Custom Field has a maximum of 80 characters.

Category

Custom fields
Customization

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