

## T7: User Defined Fields and Sales Control Codes

### Agenda:

1. UDF Setup in School Settings
2. Sales Control Code Setup in School Settings
3. Using SCC in Item Maintenance
4. Use on the Work Screen
5. Using UDF options in reporting

1. **UDF Setup in School Settings**
  - a. Define UDF labels on UDFs tab.

### Customer User-Defined Labels:

You can enter up to three user-defined fields for Customers. These fields are used for string type data; that means they are not appropriate for dates or numbers.

**Customer Dates:** You can enter up to two date user-defined fields for Customers.

This is an example of the Customer Maintenance screen showing values entered into the 3 UDFs that have been defined.

**2. Sales Control Codes – Setup in School Settings**

- a. We’re going to set up a code for students who are on Pep Squad. See the example above.
- b. Set up a 3 character code “PEP.” This stands for pep squad.
- c. Set up a description “Pep Squad.”
- d. Set up a Tool Tip to prompt you in Customer Maintenance. “Check if student is on Pep Squad.”

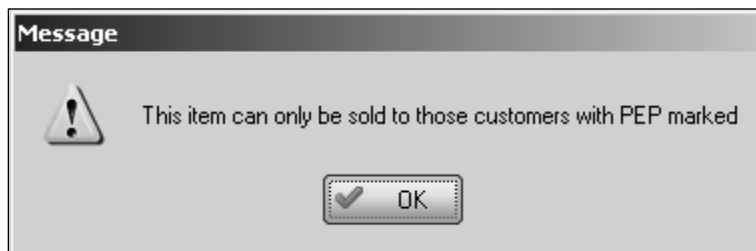
**3. Using Sales Control Codes in Item Maintenance**

- a. We’ve marked the PEP Sales Control Code “Sell only if Checked in Cust.” This will stop us from selling this item “CHEERCAMP” to anyone who isn’t in Pep Squad.

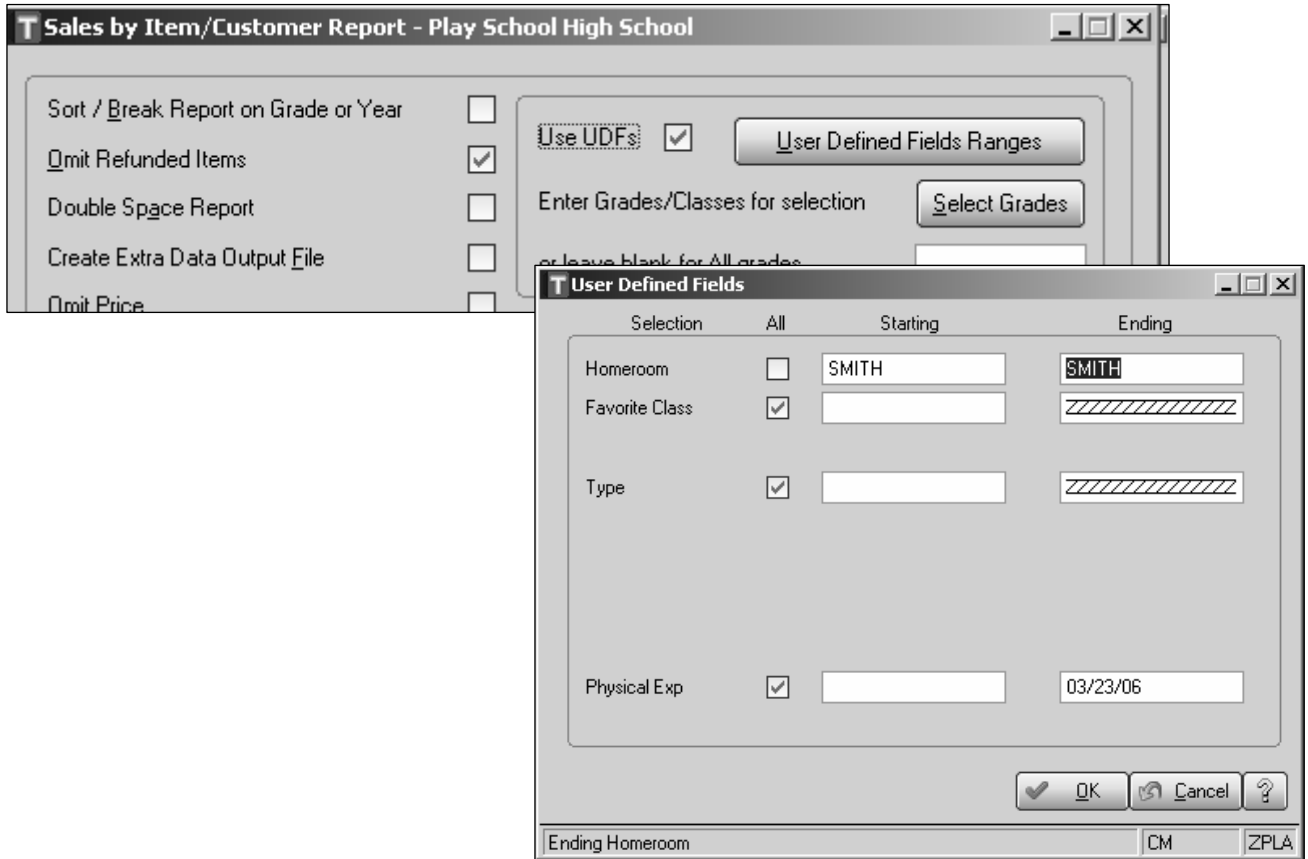
Sales Control Codes	Sell only if not Checked in Customer	Sell only if Checked in Cust	Disabled for this option
DEM	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
PEP	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**4. Use on the Work Screen**

- a. When we try to sell CHEERCAMP, Tracks will check to make sure the Customer has the correct marking before allowing the sale.
- b. Try to sell it to a student without the PEP designation, and you get this message:



5. **Using UDF options reporting**
  - a. Sales by Item/Customer Report
  - b. Balance Due Report



**NOTES:**

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