UDF Database

Overview

Introduction

The purpose of the UDF (User Defined) Database is to create a grouping option for the customers in CMS. Once the information is added to CMS, the data is available for future customer records.

This will allow you to group like customers together and report on the grouping as needed.

The UDF Database is considered a local database available only, to an individual Distributorship. You will be required to make all of the additions and edits to keep the database current.

In This Section

These topics are covered in this section:

Adding/Editing/Deleting a Title and Item

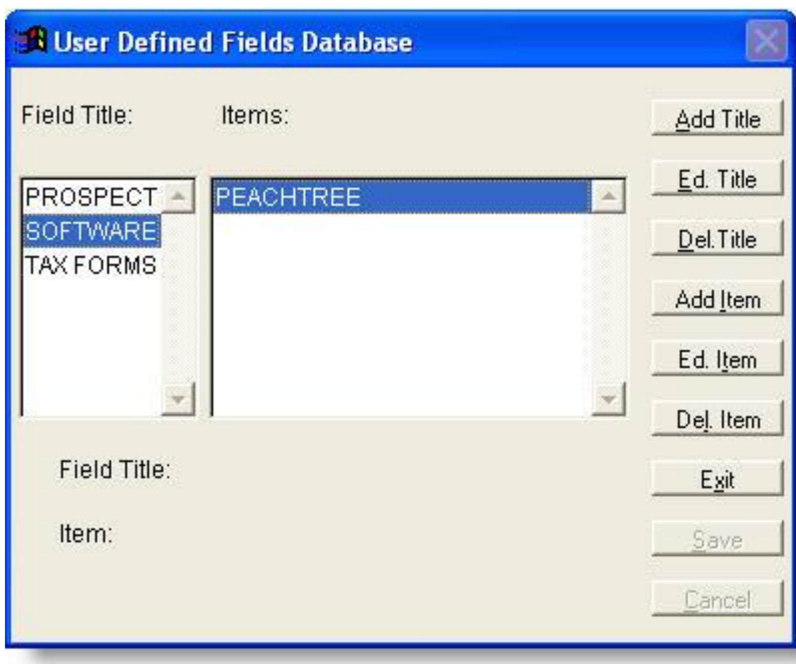
Introduction

The UDF database can be used group “like” customers together, and then run a report to find out specific information using the UDF field as criteria in the search.

Example: Peachtree is having a critical software update that will require a customer to update their forms and you want to proactively market to all of the customers in your database that this might affect. Using the predetermined UDF of Peachtree, you can now run a report to locate all the customers that currently use Peachtree software.

UDF Database Screen

This is an example of the UDF database screen:



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Adding a Title and Item

Adding a Title and Item

Before you can use the user defined functionality for a customer, you must first set up the list of options used to group customers together. Follow the instructions below:

Step	Action
1	Navigate to the **UDF Database** from the **File** menu in CMS.
2	Click the **Add Title** button.
3	In the **Field Title** field, enter the name of the "Group" [e.g. Software] and press TAB.
4	In the **Item** field, enter the name of an "option" for that group [e.g. Peachtree].
5	Click the Save button. NOTE: Use steps 2 – 5 to add as many Titles and Items as needed.

Adding additional Items

Once the title is added, you can now begin to add additional items to start building your list of options. Follow the instructions below:

Step	Action
1	After completing the steps above, click the **Add Item** button.
2	In the **Item** field, enter the name of an "option" for that group [e.g. QuickBooks].
3	Click the Save button. NOTE: Follow these steps to add as many Items to the list as needed. If adding item to "Software" a pop up to choose Compatibility Guide or Add Your Own will display.

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Editing a Title and Item

Editing a Title and Item

You may find that editing is required. You have the option to edit just the title, just the item, or both, follow the instructions below:

Step	Action
1	***Editing the Title:*** Once you've navigated to the UDF database from the File menu, select the Title to be edited then click the **ED Title** button.
2	Click the Save button. NOTE: Follow these steps to edit as many Titles as needed.

Step	Action
1	***Editing the Item:*** Once you've navigated to the UDF database from the File menu, select the Item to be edited then click the **ED Item** button.
2	Click the Save button. NOTE: Follow these steps to edit as many Items as needed.

Deleting a Title and Item

Deleting a Title and Item

You may find that deleting is required. You have the option to delete just the title, just the item, or both, follow the instructions below:

Step	Action
1	***Deleting the Title:*** Once you've navigated to the UDF database from the File menu, select the Title to be deleted then click the **Del Title** button.
2	Click the Save button. NOTE: Follow these steps to delete as many Titles as needed.

Step	Action
1	***Deleting the Item:*** Once you've navigated to the UDF database from the File menu, select the Item to be deleted then click the **Del Item** button.
2	Click the Save button. NOTE: Follow these steps to delete as many Items as needed.

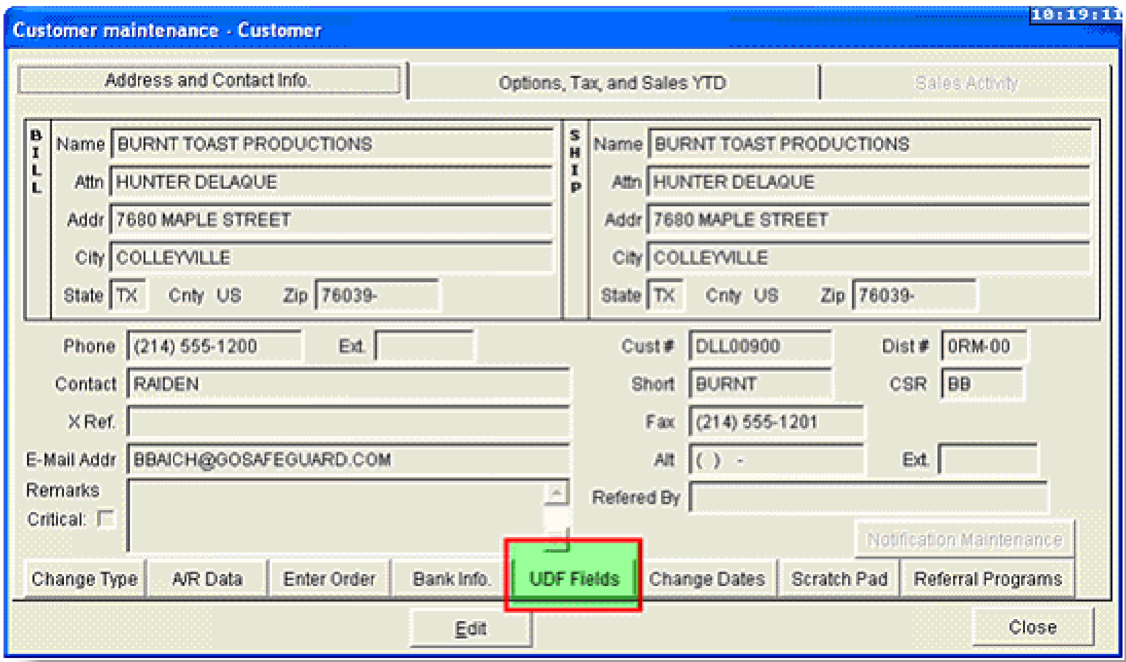
Adding a User Defined Field [UDF] to a Customer Record

Introduction

Now that you have successfully created user defined fields, you can now attach them to a customer record.

Customer Screen

This is an example of the Customer screen highlighting the UDF option:



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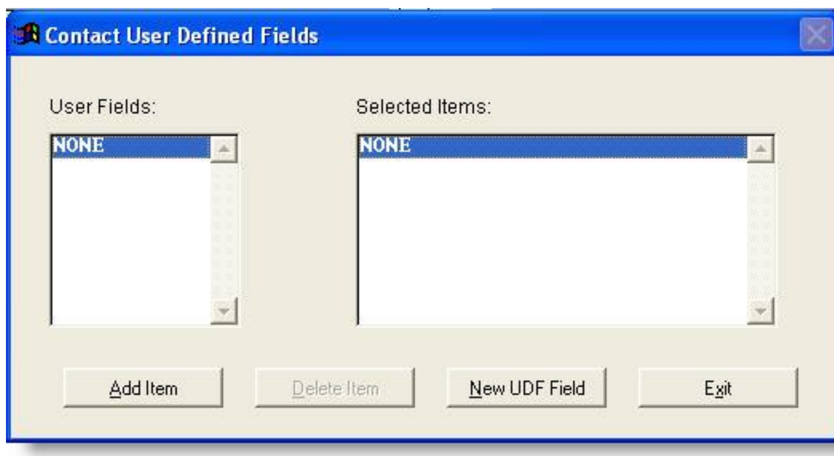
Adding a UDF to a Customer

Adding a UDF to a Customer

Follow the instructions below:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Contacts from the File menu in CMS by clicking on the Sub-menu title Contacts.</td></tr>
<tr><td>2</td><td>Locate the contact by using one of the Search On methods or press ESC and use the ↓↑ keys.</td></tr>
<tr><td>3</td><td>Click the Spacebar to view.</td></tr>
<tr><td>4</td><td>Click the UDF Fields button.

This is an example of the UDF pop-up that will appear.


</td></tr>
<tr><td>5</td><td>Click the Add Item button. The UDF dialog box will appear.</td></tr>
<tr><td>7</td><td>Using the ↓↑ keys, highlight the Title to be added, press ENTER.

NOTE: Follow steps 4 – 6 to add as many UDFs to a customer as needed. You will notice an asterisk will appear on the UDF Fields button--back on the customer screen--when there is at least one UDF associated with it.</td></tr>
<tr><td colspan="2"><u>Additional information:</u> If you want to access the UDF Database to add additional Titles and/or Items while in the customer record, simply click the New UDF Field button.</td></tr>
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