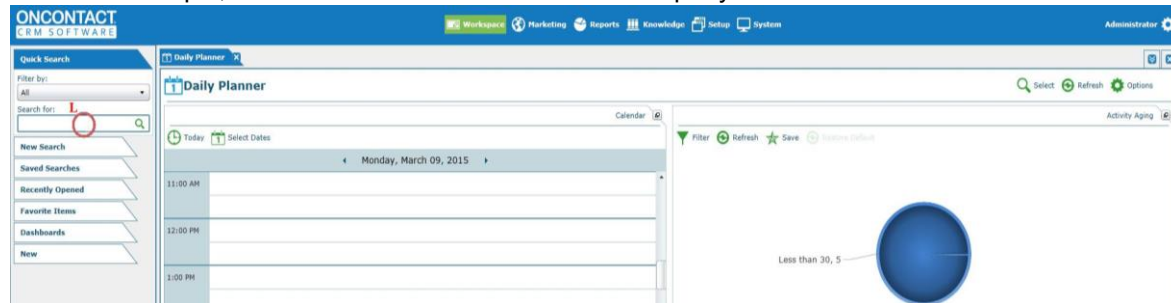
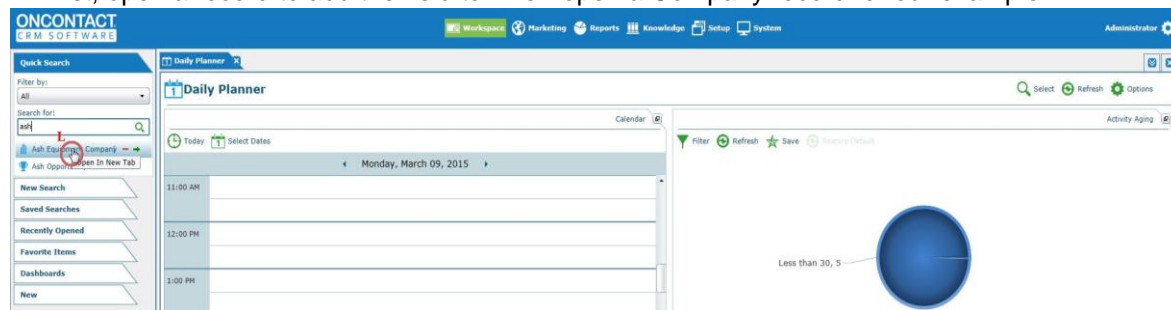


Add Field to Header

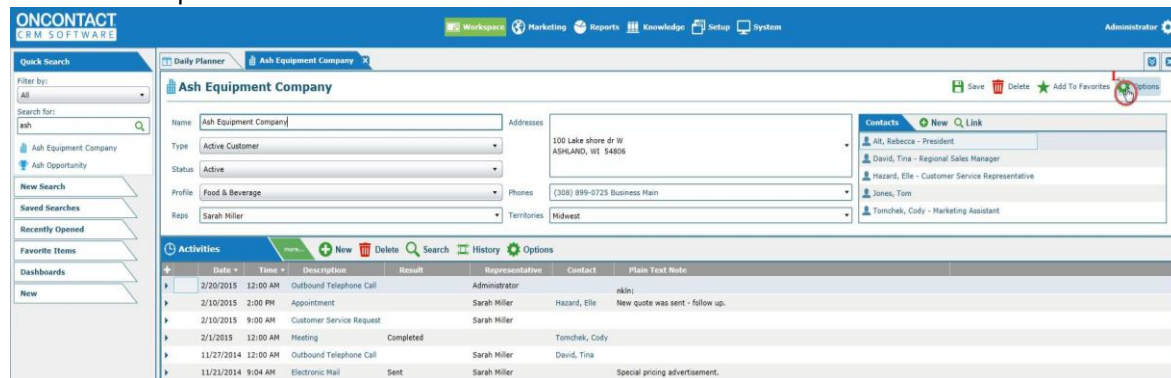
1. In this example, we will add a custom field to the Company record called 'Customer Number'.



2. First, open a record to add the field to. We'll open a Company record for our example.

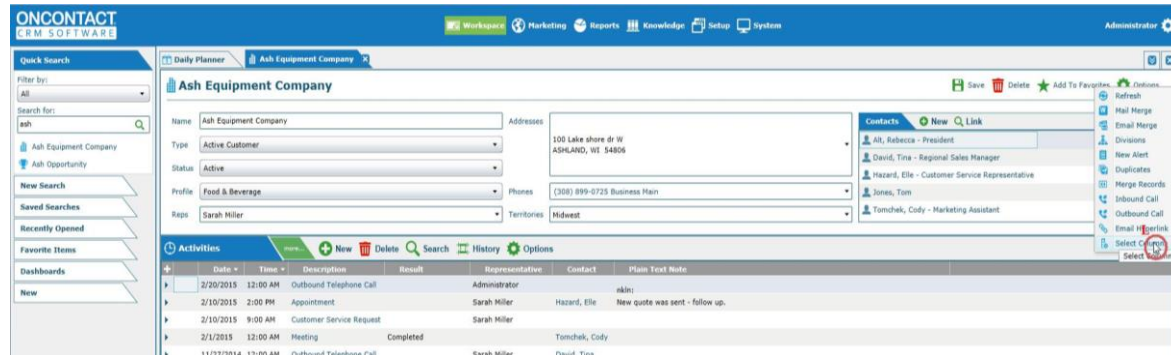


3. Left Click Options.

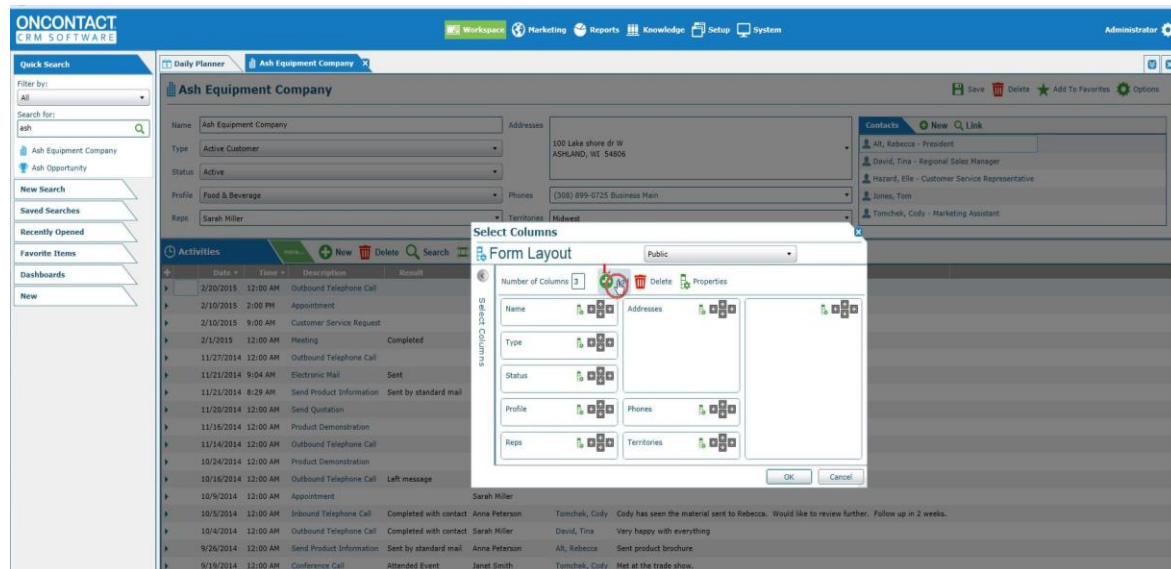


Add Field to Header

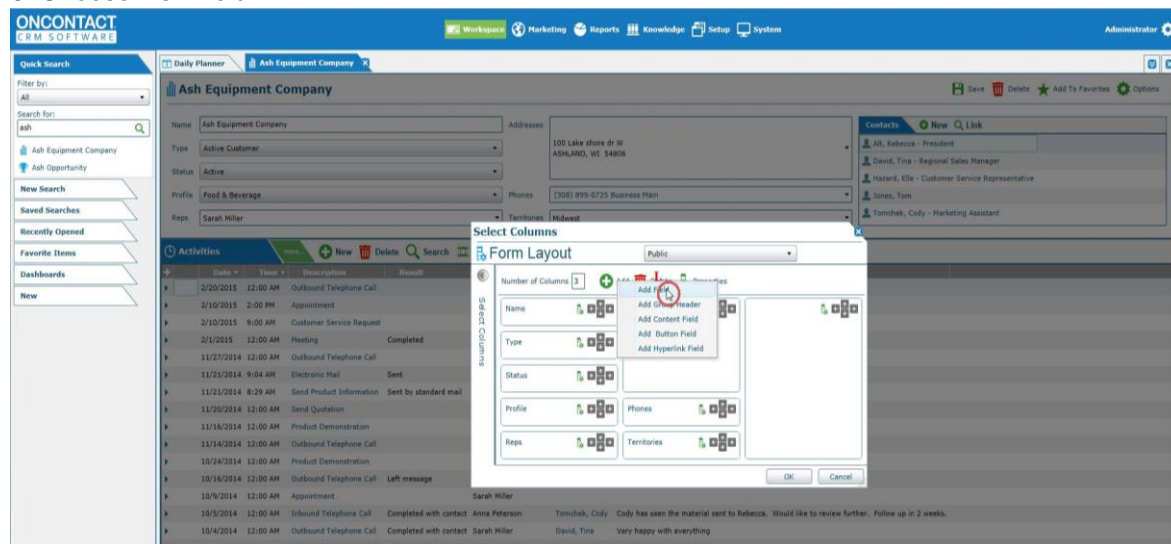
4. Choose Select Columns.



5. Left Click Add.



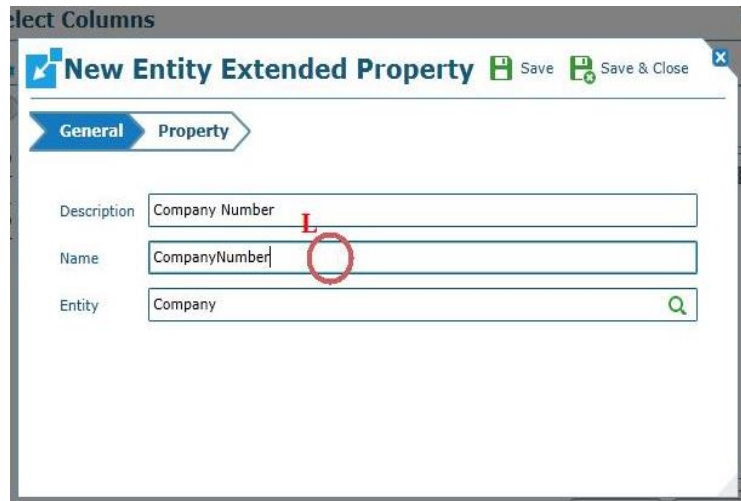
6. Choose New field.



Add Field to Header

7. Type the name for your new field.

Note: Underscore characters will automatically be placed in any spaces



Select Columns

New Entity Extended Property Save Save & Close


General Property

Description Company Number

Name CompanyNumber

Entity Company

8. Left Click Properties.



New Entity Extended Property Save Save & Close

General Property

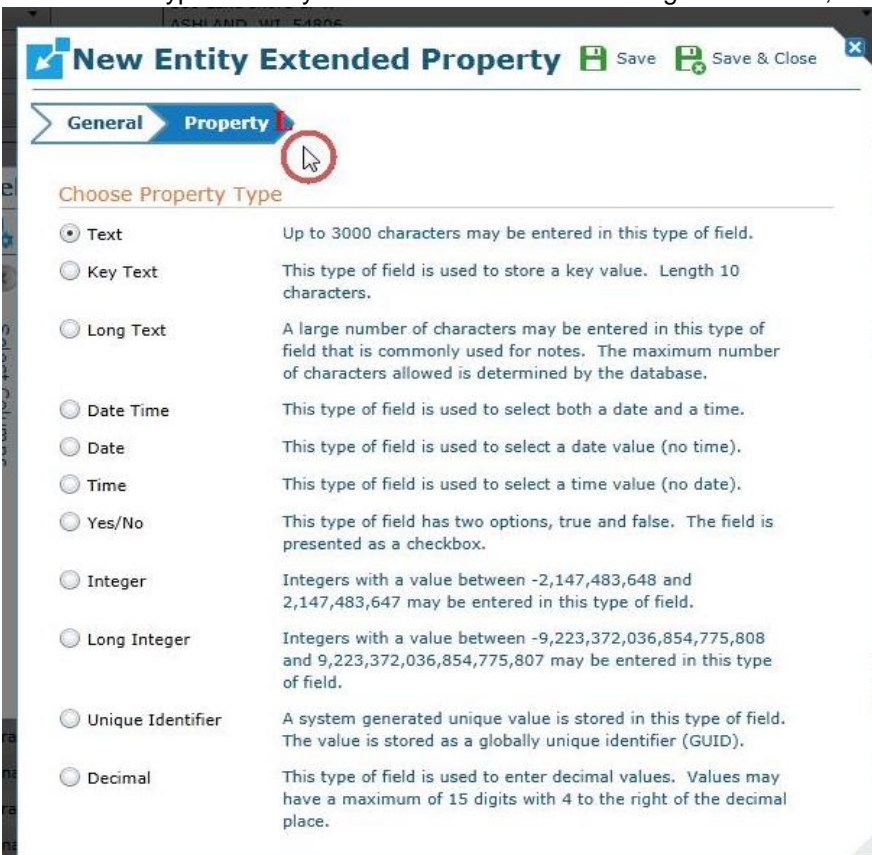
Description Company Number

Name CompanyNumber

Entity Company

Add Field to Header

9. Select the type of field you want to add. We are adding a Text Field, but there are many choices:



The screenshot shows a software window titled "New Entity Extended Property" with "Save" and "Save & Close" buttons. The "Property" tab is active, and a red circle highlights the "Property" tab label. Below the tab, the "Choose Property Type" section lists several options with radio buttons:

- Text: Up to 3000 characters may be entered in this type of field.
- Key Text: This type of field is used to store a key value. Length 10 characters.
- Long Text: A large number of characters may be entered in this type of field that is commonly used for notes. The maximum number of characters allowed is determined by the database.
- Date Time: This type of field is used to select both a date and a time.
- Date: This type of field is used to select a date value (no time).
- Time: This type of field is used to select a time value (no date).
- Yes/No: This type of field has two options, true and false. The field is presented as a checkbox.
- Integer: Integers with a value between -2,147,483,648 and 2,147,483,647 may be entered in this type of field.
- Long Integer: Integers with a value between -9,223,372,036,854,775,808 and 9,223,372,036,854,775,807 may be entered in this type of field.
- Unique Identifier: A system generated unique value is stored in this type of field. The value is stored as a globally unique identifier (GUID).
- Decimal: This type of field is used to enter decimal values. Values may have a maximum of 15 digits with 4 to the right of the decimal place.

10. Save and Close.

Add Field to Header

New Entity Extended Property Save Save & Close

General **Property**

Choose Property Type

- Text** Up to 3000 characters may be entered in this type of field.
- Key Text** This type of field is used to store a key value. Length 10 characters.
- Long Text** A large number of characters may be entered in this type of field that is commonly used for notes. The maximum number of characters allowed is determined by the database.
- Date Time** This type of field is used to select both a date and a time.
- Date** This type of field is used to select a date value (no time).
- Time** This type of field is used to select a time value (no date).
- Yes/No** This type of field has two options, true and false. The field is presented as a checkbox.
- Integer** Integers with a value between -2,147,483,648 and 2,147,483,647 may be entered in this type of field.
- Long Integer** Integers with a value between -9,223,372,036,854,775,808 and 9,223,372,036,854,775,807 may be entered in this type of field.
- Unique Identifier** A system generated unique value is stored in this type of field. The value is stored as a globally unique identifier (GUID).
- Decimal** This type of field is used to enter decimal values. Values may have a maximum of 15 digits with 4 to the right of the decimal place.

11. Your new field is now on the form. Click into the field name to edit it.

Select Columns

Form Layout Public

Number of Columns 3 + Add - Delete Properties

Select Columns

Name Addresses

Type

Status

Profile Phones

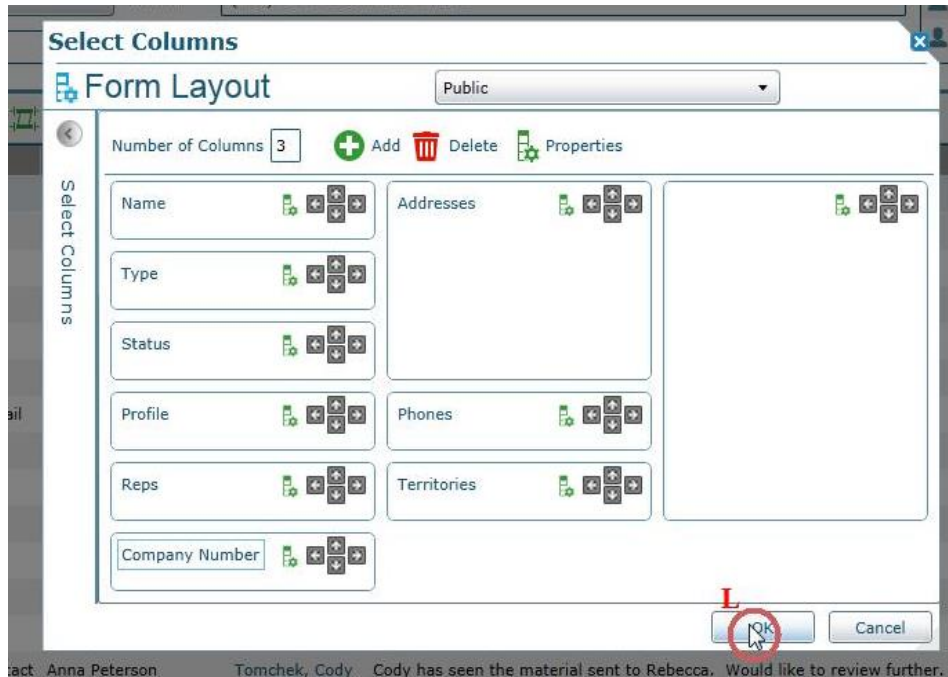
Reps Territories

Company_CompanyName Company_CompanyName

OK Cancel

12. Make any other changes (i.e. drag and drop it to a different position in the screen, etc). Click OK.

Add Field to Header



13. Close your Company record and re-open it to see the new field:

