

## Custom Fields

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### INTRODUCTION TO CUSTOM FIELDS

The UMSS extends the major objects in the system with the use of Custom Fields.

Custom fields can be created for Customers, Categories, Products, OrderLines, Orders, and Dealers. These are useful when you need to create a property for one of these classes that is not 'built-in" to the UMSS token system. For example, if you wanted to have a field on the order form that asked the customer where they heard about your store and you wanted that to be part of the order submission, you can create a custom Order field and add it to the checkout process.

Custom Fields are sub-store specific. This means that when they are created they must be added to the sub-store to which you want them to belong. Custom Fields can be assigned to one, many or all sub-stores in your UMSS.

The Objects that can have custom fields are:

Customer

- Category
- Product
- SKU
- Orderline
- Order

### THE PURPOSE OF CUSTOM FIELDS

This may best be shown by example.

The UMSS has built into it a Customer Object. The Customer Object has a number of properties built into it. For example each Customer has:

- First Name
- Last Name
- Company Name
- Email
- Phone
- Fax
- Username
- Password
- and more...

Some are required fields and some are optional.

However, you may have a situation where your customers need to also have a associated Region, or you may want to specify which customers have Open Credit or not, or any other thing that needs to be tracked with the customer. To handle any situation that may arise, the UMSS allows the creation of Custom Customer Fields.

Assume that you created 2 custom customer fields, 'Region' and 'Open Credit'. Now when you create a customer you can assign not only the values of First Name, Last Name, etc from above, but also you may give a value for Region (eg: North, South, East, West) and a value for Open Credit (eg: Yes or No).

## TYPES OF CUSTOM FIELDS

- Text
- Integer
- Currency
- Drop Down
- Radio
- Check Box
- Image
- Memo
- File

## CUSTOM CUSTOMER FIELDS

1. Name: This is the name of the custom field and this is used to reference the custom field in the templates and page elements. *Note - there can be no spaces in the name of a custom field.*
2. Prompt: This is value that is displayed to the site visitor if the custom customer field if it is desired to display something to the site visitor. For example, if you have a custom customer field named "location" you can display the prompt to the user as "Your Location:
3. Description: this is a description that is only used in the Admin to remind you of the purpose and use of the custom field.
4. Type: this is the type of custom field you want to create. the choices are:
  - Text
  - Integer
  - Currency
  - Drop Down
  - Radio
  - Check Box

- Image
- Memo
- File

Depending on the type of custom field created in this step, there will be fields that are distinct between field types. See Custom Fields - options.

5. Size:
6. Store: This is where you select the sub-store or sub-stores that this new custom field will be available. When you are first creating the custom field you can only add it to "All Stores" or one specific sub-store. However, after the custom field has been created, on the same screen you can select the custom field by checking the box at the left-most column of its row and by clicking the 'Stores' button you can add the custom field to one or many sub-stores.
7. After filling out these fields you must create the custom field by clicking the "Update" button at the top of the table. After the custom field is created, the rest of the columns are opened and you can continue to define and finish it.
8. Required: This field can be checked and in the case of custom customer fields, then this field would be required to define the customer and either the Admin creating a customer would have to populate this field or the customer when they are creating their profile in the checkout would have to populate this field.
9. Default: you can provide a default value for the field.
10. Starting Value:
11. Ending Value:

The following are the default values in the Library Config File. These are defaulted to 0 in the Library and can be turned on in the Local Stores by setting this values to "1" and then listing the 'Names' fo the Custom Fields in the CustomFieldList variable

```
<cfset session.CO.Account.ShowCustomerCustomFields = "0">
<!---Turns on Customer Custom Fields on Checkout.Account--->

<cfset session.CO.Account.ShowCustomerCustomFieldsList = "cellphone,Region">
<!---Turns on Customer Custom Fields on Checkout.Account--->
```

```
<cfset session.CO.CustomerEdit.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.CustomerEdit.ShowCustomerCustomFieldsList =
"cellphone,Region"> <!--Turns on Customer Custom Fields on
Checkout.CustomerEdit-->
```

```
<cfset session.CO.CC.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.CC.ShowCustomerCustomFieldsList = "cellphone,Region">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PO.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PO.ShowCustomerCustomFieldsList = "cellphone,Region">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PD.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PD.ShowCustomerCustomFieldsList = "cellphone,Region">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.Express.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.Express.ShowCustomerCustomFieldsList = "cellphone,Region">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPO.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPO.ShowCustomerCustomFieldsList =
"cellphone,Region">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPD.ShowCustomerCustomFields = "0">
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPD.ShowCustomerCustomFieldsList =  
"cellphone,Region">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

## CUSTOM CATEGORY FIELDS

## CUSTOM PRODUCT FIELDS

## CUSTOM SKU FIELDS

## CUSTOM ORDERLINE FIELDS

## CUSTOM ORDER FIELDS

The following are the default values in the Library Config File. These are defaulted to 0 in the Library and can be turned on in the Local Stores by setting this values to "1" and then listing the 'Names' of the Custom Fields in the CustomFieldList variable

```
<cfset session.CO.Account.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.Account-->  
  
<cfset session.CO.Account.ShowOrderCustomFieldsList = "PONo">  
<!--Turns on Customer Custom Fields on Checkout.Account-->
```

```
<cfset session.CO.CustomerEdit.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.CustomerEdit.ShowOrderCustomFieldsList =  
"cellphone,Region">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.CC.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.CC.ShowOrderCustomFieldsList = "PONo">
```

```
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PO.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.PO.ShowOrderCustomFieldsList = "POno">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.PD.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.PD.ShowOrderCustomFieldsList = "POno">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.Express.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.Express.ShowOrderCustomFieldsList = "POno">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPO.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.ExpressPO.ShowOrderCustomFieldsList = "POno">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

```
<cfset session.CO.ExpressPD.ShowOrderCustomFields = "0">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->  
  
<cfset session.CO.ExpressPD.ShowOrderCustomFieldsList = "POno">  
<!--Turns on Customer Custom Fields on Checkout.CustomerEdit-->
```

## DISPLAYING CUSTOM ORDER FIELDS

In order to display Custom Order Fields you must follow these steps:

1. Create the custom order field
2. In the config.master set the variable session.Checkout.LocalAreaUnderCustomFields to 1

3. In order for the custom order field to appear on the checkout screen, and to be saved with all of the order information you have to add the following code to the Checkout.LocalAreaUnderCustomFields page element:

```
{{customfield_display("Order","nameOfCustomOrderField","mod")}}
```