



# Custom Data Fields

v1.0

## What are Custom Data fields?

There are data fields in some of the Exigo tables that have been created as generic storage fields to be used by the Company to store additional data that does not fall into the already defined data fields in the tables. For example, a Company who sells cosmetic products wants to store skin type as a field of information for their customer. The standard data fields available in the Customer table do not include skin type, so a custom field could be used to store this instead.

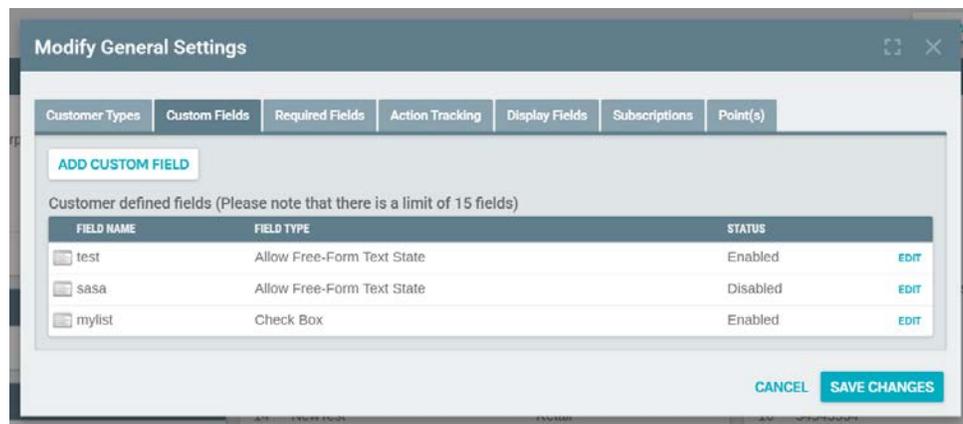
These fields are commonly referred to as User Defined or Other fields depending upon how they are used. Here is a summary of these extra fields:

- Customer User Defined Fields (15)
- Customer Date Fields (5)
- Customer Extended Properties Fields (30)
- Orders Other Fields (20)
- Items Fields (5 Flags and 4 Fields)

### I. CUSTOMER USER DEFINED FIELDS

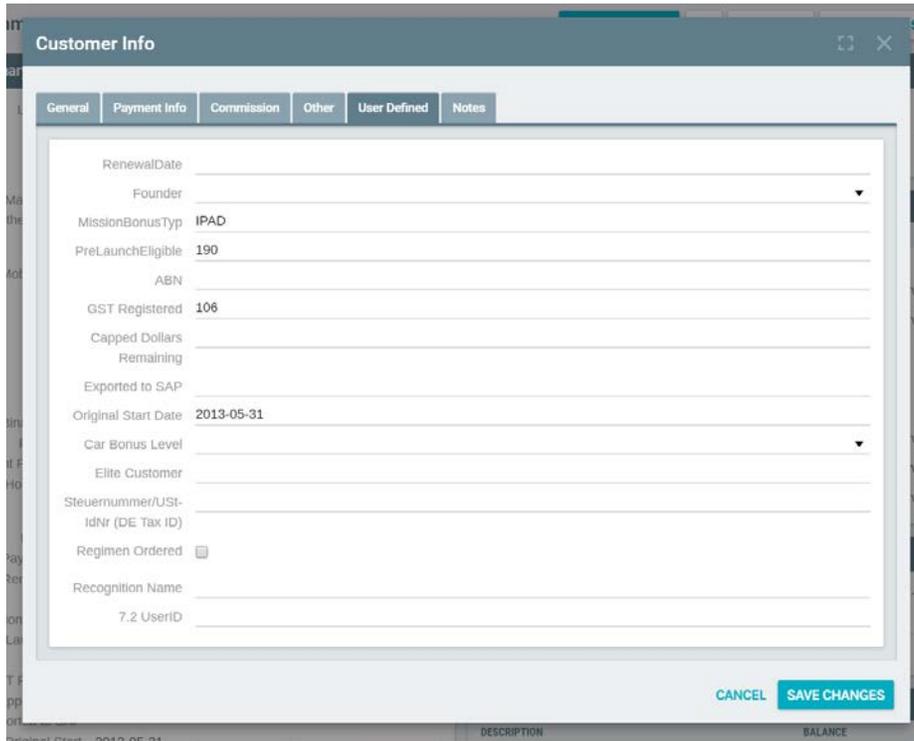
There are fifteen (15) fields in the **Customer table** labeled as Field1 through Field15. There is an interface screen in the Exigo Admin that will let the Company manage these fields. The data types for these fields can be set as they are defined.

- Go to **Administration>>Settings** and in the middle column, click on **Modify Customer Settings**.
- From the popup screen, go to the **Custom Fields tab**.

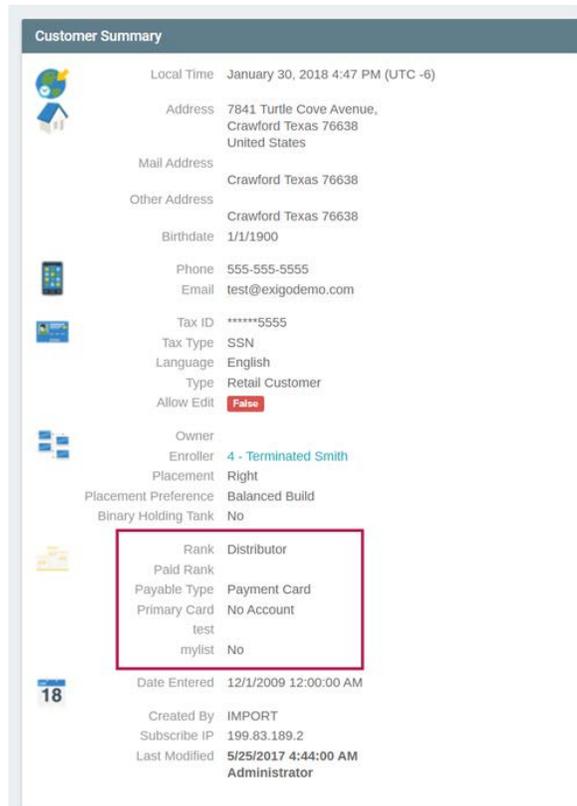


These fields can be populated from the customer screen.

- Go to **Customer>>Customer Search** and then select the customer you wish to edit. From their customer screen, click on **Edit Customer**.
- When the popup screen appears, go to the **User Defined tab**.

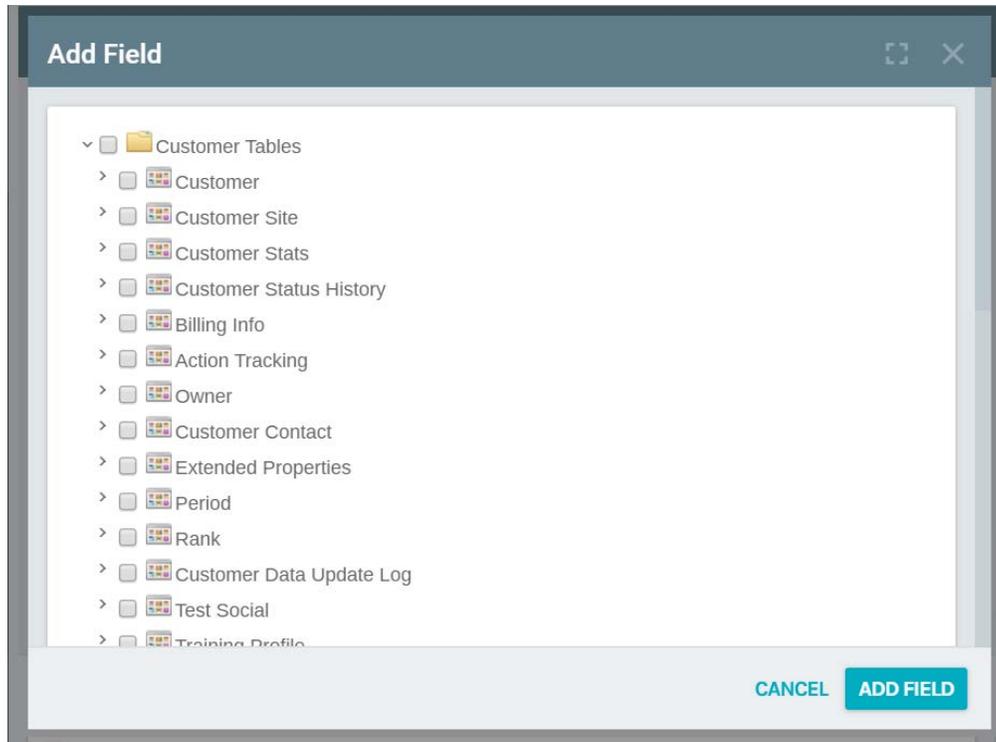


On the **customer portal page**, these fields will appear in the **Customer Information** section:



Customer Summary	
Local Time	January 30, 2018 4:47 PM (UTC -6)
Address	7841 Turtle Cove Avenue, Crawford Texas 76638 United States
Mail Address	Crawford Texas 76638
Other Address	Crawford Texas 76638
Birthdate	1/1/1900
Phone	555-555-5555
Email	test@exigodemo.com
Tax ID	*****5555
Tax Type	SSN
Language	English
Type	Retail Customer
Allow Edit	False
Owner	
Enroller	4 - Terminated Smith
Placement	Right
Placement Preference	Balanced Build
Binary Holding Tank	No
Rank	Distributor
Paid Rank	
Payable Type	Payment Card
Primary Card	No Account
test	
mylist	No
Date Entered	12/1/2009 12:00:00 AM
Created By	IMPORT
Subscribe IP	199.83.189.2
Last Modified	5/25/2017 4:44:00 AM Administrator

These fields can be used in the **Report Builder module** and will appear in the **Customer section** as **User Defined 1 through User Defined 15** when you use the **Add Field feature** for the Report.



These fields are also part of the data set for the **DBSync Replicated Database** and the **Exigo API Services**.

## II. CUSTOMER DATE FIELDS

There are five (5) **date fields in the Customer table** labeled as **Date1 through Date5**. These can be used to store date values that are needed for custom programs. For example, you may need to have a renewal date determined at the time the customer is entered into the database. **These fields can only be populated from programs written by Exigo programmers since there is no interface to access the data.** These fields are also available through some services as part of the Exigo API.

## III. CUSTOMER EXTENDED PROPERTY FIELDS

A data set can be defined for a customer and store up to thirty (30) fields of information for each data set. These values are stored in the **CustomerExtended table** for each customer. **There is no interface for the Company to use, these have to be setup by an Exigo programmer at the time of the setup and configuration of the account or instance of Exigo.** The Company can define the data type for each field that will be configured as part of the data set.

**Extended Property Setup** [Close]

Extended Property
Advanced

Property Name

**Customer Extended Property Fields:**  
(Please note there is a limit of 30 fields per property.)

ADD FIELD

FIELD NAME	FIELD TYPE	EDIT	...
Purchase Date	Date Field	EDIT	...
Installation Date	Date Field	EDIT	...
Total Units	Free Form Text	EDIT	...
Protection	Drop-Down List	EDIT	...

CANCEL
[Trash]
SAVE CHANGES

Once these values are setup, the **extended property set** can now be viewed from the **Customer Screen**. Using a Warranty Card data set as an example, the interface can be accessed from the **Customer Options menu**:



**Exigo Test**  
Exigo Testing Company  
ID# 101780

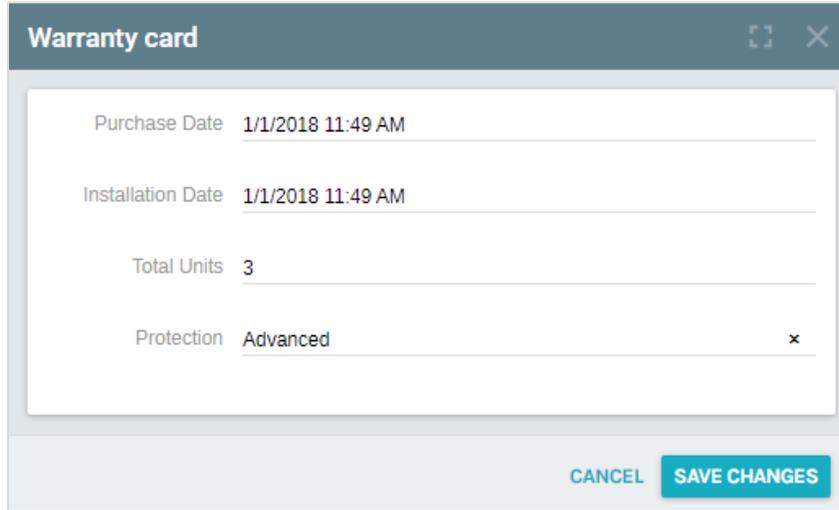
**Extended Properties** NEW WARRANTY CARD

**CUSTOMER OPTIONS**

- Summary
- Orders/Invoices
- Payments
- Enroller Tree
- Volumes
- Email Messages
- Account History
- Vendor Bills
- Vendor Payments
- Subscriptions
- Point Accounts
- Warranty card

NAME	EDIT	...
Purchase Date: 1/1/2018 11:49 AM Installation Date: 1/1/2018 11:49 AM Total Units: 3 Protection: Advanced	EDIT	...

You can **add a data set** or **edit an existing one** for the Customer:

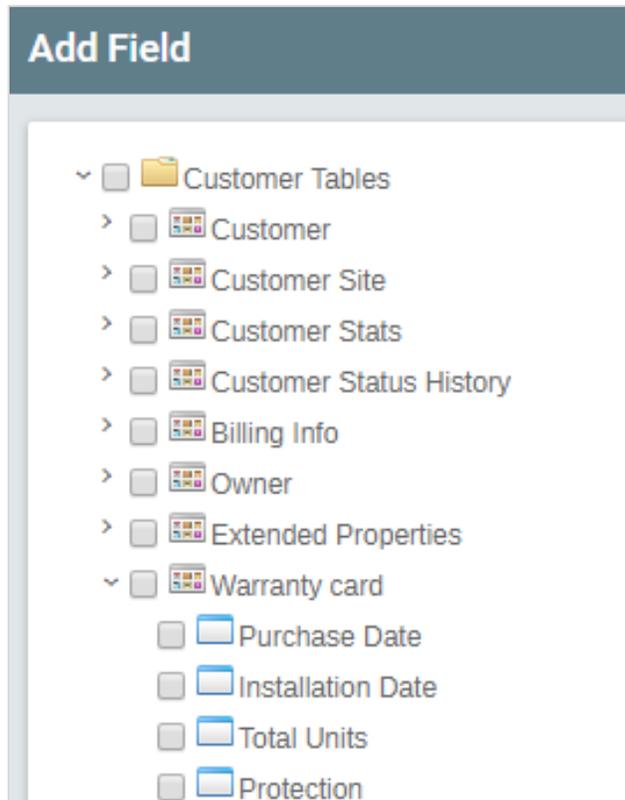


The screenshot shows a 'Warranty card' form with the following fields:

Purchase Date	1/1/2018 11:49 AM
Installation Date	1/1/2018 11:49 AM
Total Units	3
Protection	Advanced

At the bottom of the form are two buttons: 'CANCEL' and 'SAVE CHANGES'.

The **Customer Extended Property data set** will become a new table in the **Customer Tables** section of the **Report Builder** so you can use any of these fields on your report:



The 'Add Field' dialog shows a tree view of data sources:

- Customer Tables
  - Customer
  - Customer Site
  - Customer Stats
  - Customer Status History
  - Billing Info
  - Owner
  - Extended Properties
  - Warranty card
    - Purchase Date
    - Installation Date
    - Total Units
    - Protection

These fields are currently NOT available in the DB Sync replicated database or the Exigo API Services.

#### IV. OTHER DATA FIELDS

There are twenty (20) **Other fields in the Order table** labeled as **Other1 through Other20**. There is an **interface screen** in the **Exigo Admin** that will **let the Company manage the first 10 fields**.

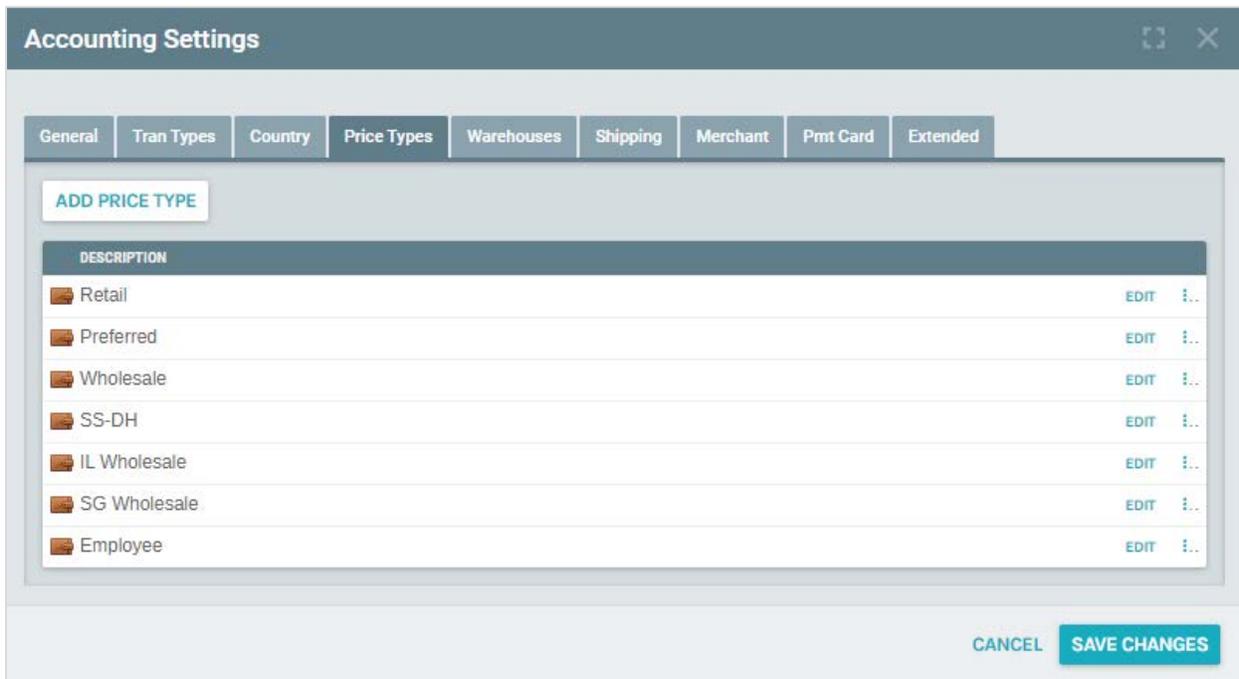
The data types for these fields are money with a length of 8 digits for Other1 through Other10 and alphanumeric string (nvarchar) with a length of 400 characters for Other11 through Other20.

#### Extended Pricing

**Other1 through Other10** are managed with an interface that **allows the Company to define extended Price Types** for their items/products. More information on how to populate these values for each product can be found in the [Exigo Item Maintenance manual](#).

To define the Extended Pricing values:

- Go to **Administration>>Settings** and then go to the **Accounting Settings** screen from the top right tool bar drop down menu.
- From the **Accounting Settings** screen, click on **Modify Price Types** in the left column.
- From the popup screen, go to the **Price Type** tab:



**Accounting Settings**

General | Tran Types | Country | **Price Types** | Warehouses | Shipping | Merchant | Pmt Card | Extended

**ADD PRICE TYPE**

DESCRIPTION	EDIT	...
 Retail	EDIT	...
 Preferred	EDIT	...
 Wholesale	EDIT	...
 SS-DH	EDIT	...
 IL Wholesale	EDIT	...
 SG Wholesale	EDIT	...
 Employee	EDIT	...

CANCEL **SAVE CHANGES**

Once defined, these values can now be found on the **Pricing** tab as **Extended Pricing** when you edit an Item:

**Edit Product: 300**

General Warehouse **Pricing** Availability Taxation Bill of Materials Subs/Points Kit Categories

Currency Dollars (US) **EXTENDED PRICING**

	PRICE	TAX ON PRICE	SHIP ON PRICE	PCV	CCV
🇺🇸 Retail	14.5300	4.3000	2.3200	1.0000	1.0000
🇺🇸 Preferred	0.0000	0.0000	0.0000	0.0000	0.0000
🇺🇸 Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
🇺🇸 Employee	0.0000	0.0000	0.0000	0.0000	0.0000
🇺🇸 SS-DH	0.0000	0.0000	0.0000	0.0000	0.0000
🇺🇸 IL Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000
🇺🇸 SG Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000

CANCEL **SAVE CHANGES**

Select the **Extended Pricing** button and you will be able to enter extended pricing values:

Extended pricing for 'Dollars (US)'

	PERFORMANCEPACK	RETAIL PROFIT	SALESVOLUME	15% RETAIL TIER	CHECKMATCH%	DRIVENQUALIFIERLEVEL1	3URFREECREDIT	OTHER8	OTHER9	OTHER10
Retail	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Preferred	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
Employee	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
SS-DH	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
IL Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
SG Wholesale	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

CANCEL **SAVE CHANGES**

During Order Entry, **Customer Service users can override these values** along with any price override permission they may have:

**Item Price Details / Override**

Tax On Price: \_\_\_\_\_ 0.0000

Ship On Price: \_\_\_\_\_ 0.0000

PCV: \_\_\_\_\_ 0.0000

CCV: \_\_\_\_\_ 0.0000

PerformancePack  
Each: \_\_\_\_\_ 0.0000

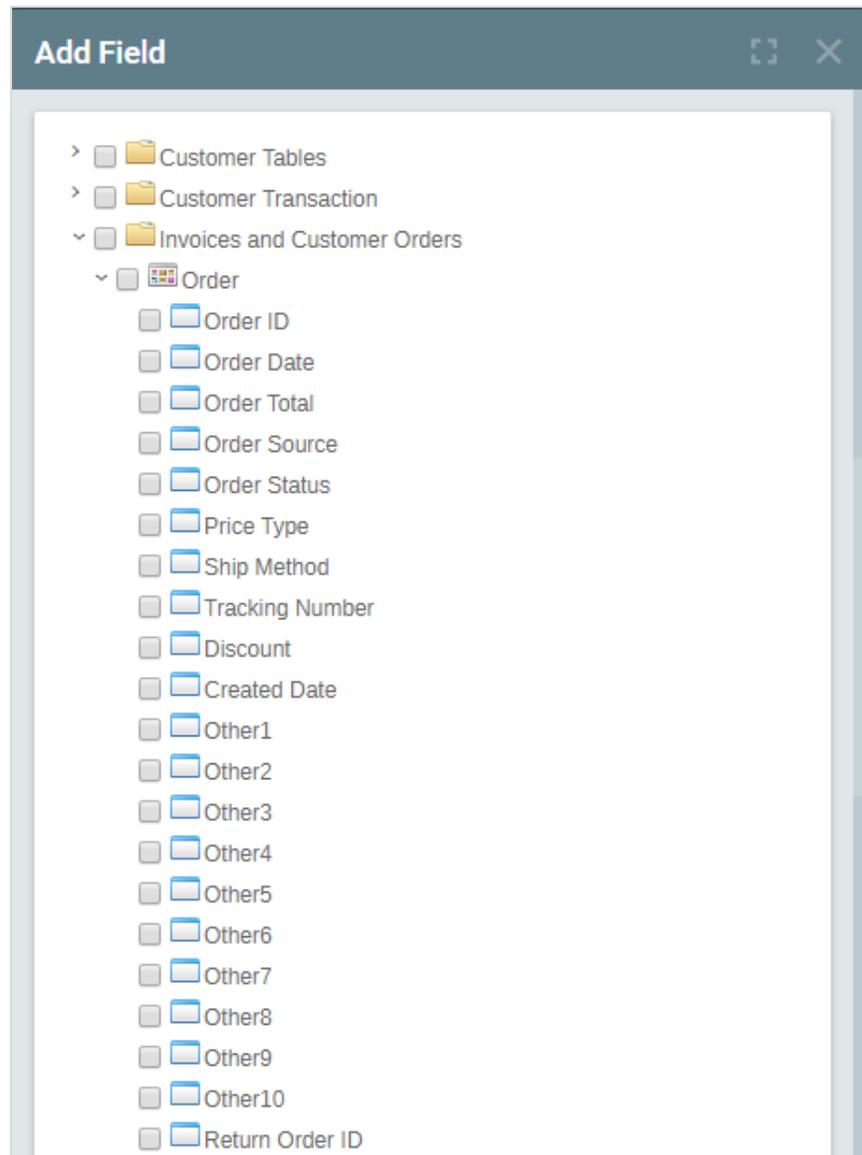
These values are stored with the items in the **OrderDetail** table and then rolled up as totals on the Order and found in the **Order** table. Screen prints of the Detail Report when you view an **Order Invoice**:

Order Detail									
CompanyID	6	CVEach	0.0000	StateTax	1.8750	Other1	0.0000	OriginalTaxableEach	30.0000
OrderID	4920324	CommissionableVolume	0.0000	CityTax	0.3000	Other2Each	0.0000	OriginalBVEach	0.0000
OrderLine	1	ShippingPriceEach	0.0000	CityLocalTax	0.0000	Other2	0.0000	OriginalCVEach	0.0000
ItemID	287	ChargeShippingOn	0.0000	CountyTax	0.0000	Other3Each	0.0000	BackOrderID	
ItemCode	300	IsTaxedInRegion	True	CountyLocalTax	0.3000	Other3	0.0000	BackOrderedQty	0
Description	Product 300	IsTaxedInRegionFed	False	ManualTax	0.0000	Other4Each	0.0000	IsOverride	False
Qty	1.0000	IsTaxedInRegionState	False	IsBackOrder	False	Other4	0.0000	StateTaxable	30.0000
PriceEach	0.0000	TaxablePriceEach	30.0000	BackOrderBatchID	0	Other5Each	0.0000	IsStateTaxOverride	False
PriceExt	0.0000	Taxable	30.0000	ProjectID		Other5	0.0000	Other6Each	3.0000
BVEach	0.0000	CombinedTax	2.4750	WeightEach	1.0000	VendorTracking		Other6	3.0000
BusinessVolume	0.0000	FedTax	0.0000	Other1Each	0.0000	DiscountExt	0.0000	Other7Each	0.0000

## Other Data Fields

The remaining **Other11 through Other20** fields in the **Orders table** can be used to store values that are needed for **custom programs**. **These fields can only be populated from programs written by Exigo programmers since there is no interface to access the data.** These fields are also available through some services as part of the Exigo API.

The **Other1 through Other20 fields** can also be used in the **Report Builder module** when you use the **Add Field feature** for the Report and are also available in the **DB Sync replicated database**:





The **Field1 through Field4 values** can be optionally used as **data storage** to be defined by the company (tax codes) or to auto generate **Recurring Orders**.

If a company elects to use these as **autoship triggers**, then:

- Any item code that is entered into **Field1** will **auto generate a monthly autoship** for this item.
- Any item code in **Field2** will **auto generate a quarterly autoship**.
- Any item code in **Field3** will **auto generate a yearly autoship**.

Edit Product: 300
⌵ ⌵

General
Warehouse
Pricing
Availability
Taxation
Bill of Materials
Subs/Points
Kit Categories

Description **Product 300**

Item Code **300** Weight **1.0000**

Notes **1**

Available in all Countries / Regions

Taxable in all Countries / Regions

Allow for Recurring Order

Allow Partial Amounts

Print BOM on Invoice

Hide from Search

Virtual Item

Item Type **Static Kit** ▼

**User-defined Settings**

5% Promotion

East BackOrder

West BackOrder

Activity Pack

Auto 1 **Auto 1** **Weekly** ▼

**Triggers when order is accepted:**

Advance Subscription(s) (detail under Subs tab)

Increment Point Account(s) (detail under Points tab)

Create Payment Card  **-- Not Selected--** ▼

Create Gift Card  **Referral Points** ▼

Upgrade Customer Type  **Distributor** ▼

Create Recurring Order  **Monthly** ▼

Stop Increment ▼

Metal Type ▼

AutoShipItem ▼

Discount % ▼

Tax Classification ▼

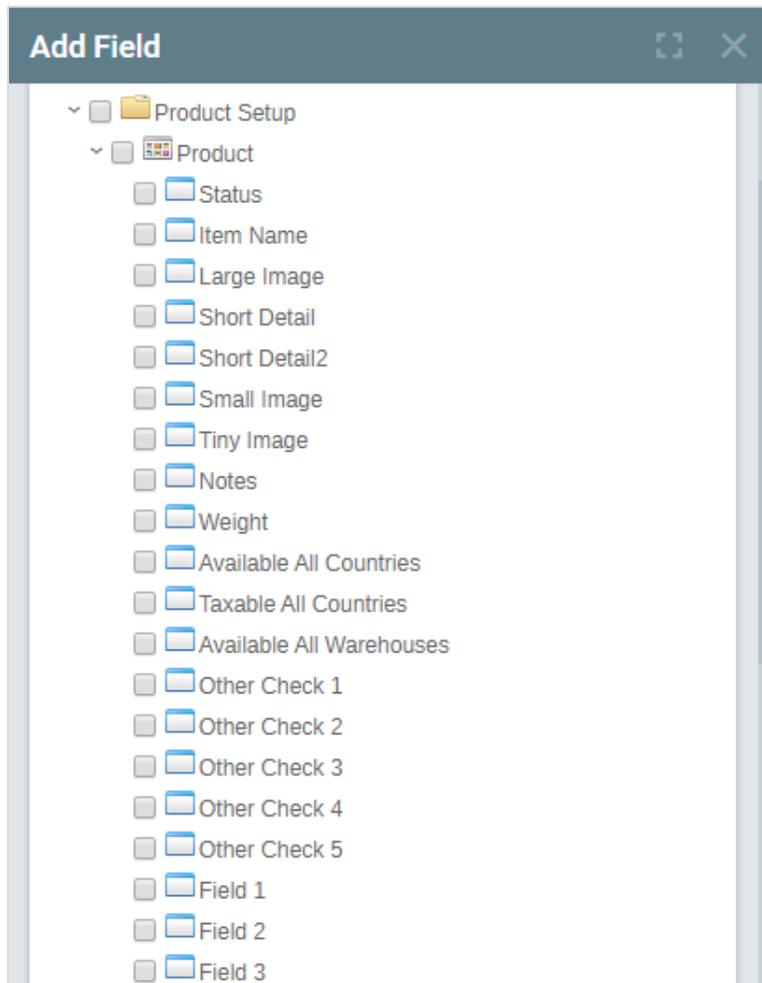
GL Code ▼

KR Description ▼

Category ▼

CANCEL
SAVE CHANGES

These fields are also available through the **Report Builder** when you use the **Add Field feature** for the Report.



These fields are currently NOT available in the DB Sync replicated database or the Exigo API Services.