



# POSitive Tips

MARCH 14, 2007

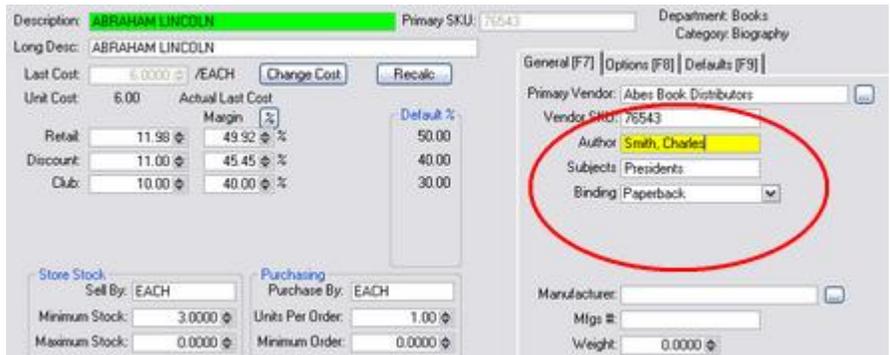
VOLUME 2, NUMBER 3

## User Defined Fields

### INVENTORY UDFs

An inventory item sometimes requires more than just a brief description and a SKU to properly distinguish it from other inventory items.

Books, for example, are much more than just a title. One wants to know the author, subject matter, classification, binding, or number of pages. These extra fields are



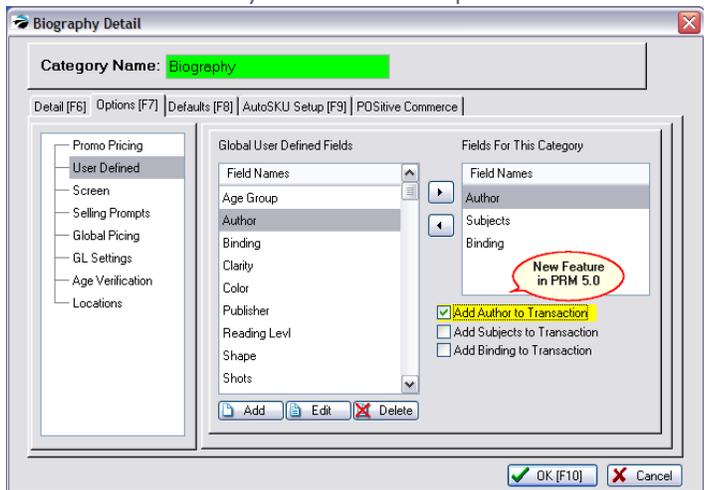
searchable and reportable and can be of great benefit.

### HOW TO CREATE INVENTORY UDFs

Even if you have already created your inventory, just a simple change in the category setup opens up new tools to enhance your sales and reports.

Go to Utilities: Categories. Highlight a category and choose Edit. On the Options tab, choose User Defined.

The center section is a listing of ALL user defined fields. Assign up to six (6) fields for the category by clicking on the transfer arrows.



#### TIP OF THE MONTH

#### "User Defined Fields"

Two Types: INVENTORY and CUSTOMER

Enhance an inventory item or a customer record with up to six (6) fields of additional information

Search the entire inventory list for matching criteria

#### NEW FEATURE IN PRM 5.0

The option "Add {UDF} To Transaction" as pictured at right can print the UDF information on the customer invoice.

**Experience the NEW SQL POSitive Retail Manager 5.0**

Join us on the web for a **FREE introductory class**

Contact your dealer or [shasta@gopositive.com](mailto:shasta@gopositive.com) for more information

**POSitive Software Company**

www.gopositive.com

Sales  
800-735-6860  
Support  
866-368-2266

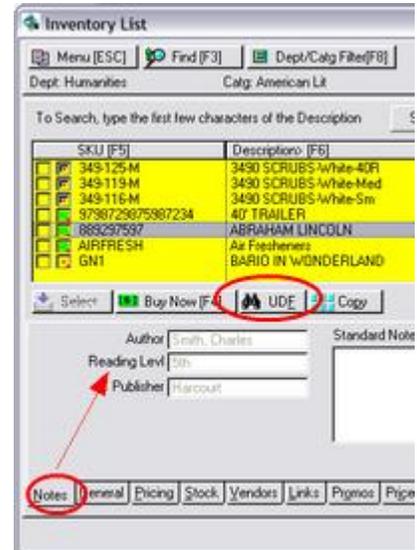
## FILLING IN UDFs

After the category options have been changed to include UDFs, all inventory items assigned to the category are automatically updated with blank fields.

Simply edit the inventory item and amend with the extra information.

TIP: If you have lots of fields to fill in, consider using the Inventory Importer.

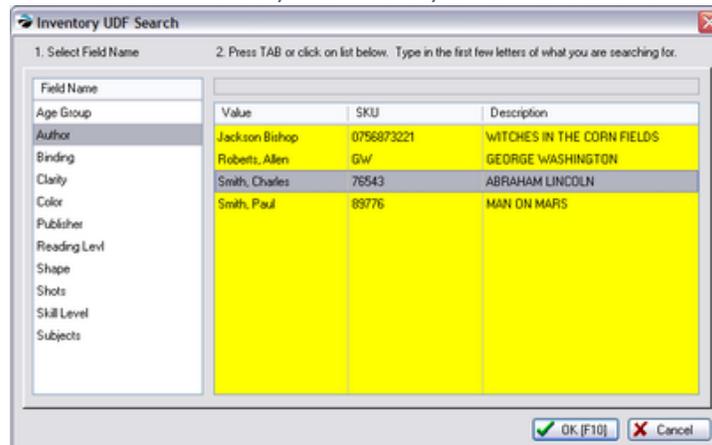
The "Notes" tab at the bottom of the Inventory List displays the UDF information.



## USING UDFs TO FIND ITEMS

At the Inventory List click on the Search UDFs button.

After highlighting a UDF, press tab and type to find the specific item. Press OK to return to the Inventory List where you can select it for an invoice.



## Any Questions?

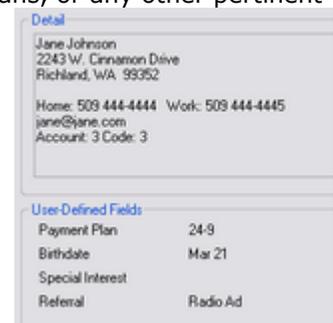
More information about Inventory and Customer User Defined Fields can be obtained from your dealer or by reviewing the online Help files.

## HOW TO CREATE CUSTOMER UDFs

User Defined Fields for customers help you track important information such as birthdates, special interests, referral sources, payment plans, or any other pertinent information.

Go to Utilities: Customer Categories. Create or Edit a category and choose the User Defined Fields tab. Enter a label for any of the six fields.

Customers assigned to the customer category will have the informational fields which can be readily edited prominently displayed on the customer record.



## REPORTS FILTERED BY CUSTOMER UDFs

Label printing and some reports can use these UDFs as query options for targeting specific customers.