BatchMaster Web -

Custom Master Design (Detailed)

Product Version: BatchMaster Web	**Doc Version: 01**
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About the Manual

Purpose of the Manual

This user guide provides instructions for using BatchMaster Enterprise. The scope of the document is limited to training users on how various BatchMaster modules are inter-related, the purpose of various BatchMaster screens, and the procedural steps to maintain them. The training objective is to help the user get hands-on experience of how BatchMaster Enterprise functions.

This document aids as a hand-out during training and as an introduction to other manuals. It is not as descriptive as other accompanying manuals, but it is packed with necessary and important information that is required for someone to use BatchMaster Enterprise as a new user.

We designed the user guide based on experience obtained from numerous training sessions. This document aims to strengthen user knowledge on the functioning of BatchMaster Enterprise.

Target Audience

This document is intended for a vast group of people which may include Trainers, VARs, Customers, and even BatchMaster employees who are undergoing BatchMaster training. We hope it will be of immense use as a conceptual guide for Trainers, as a resource material for VARs and customers, and as a reference guide for existing BatchMaster Users and employees.

Organization

The user guide is organized module-wise to reduce bulkiness and enhance usability. Each module contains an overview of the module, concepts you must know before you begin using the module, an overview or purpose of the screen, how to maintain data in the screen, Key Points, and FAQs. Examples have been included to help you understand the logic better and maintain data quickly.

Symbols & Conventions

Symbol	Description
	Note
	Mandatory setting
	Tips

Convention	Description
Italicized (Sales Order Entry)	Module name, screen name & components
“ ” (“BatchMaster Web Accounting Guide”)	Reference document

Abbreviation	Description
API	Application Program Interface

Contents

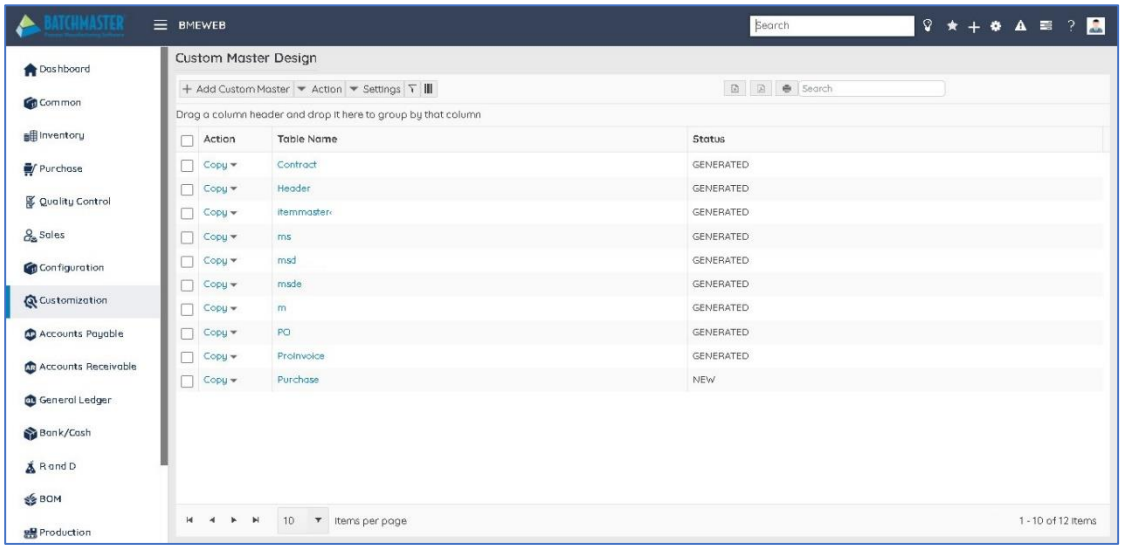
Custom Master

The Custom Master screen is a tool in BatchMaster that you use to create screens for BatchMaster and flow logic for the screens. It allows you to create Custom forms as per your business logic with desired interface.

Go To: Customization→ Custom Screens→ Custom Master Design.

Custom Master Design – Dashboard

You can manage custom forms from this dashboard (Listing Page). By default, the system displays all the Custom Master Screen records maintained for your business/company. You can click on any of the record to view its details.

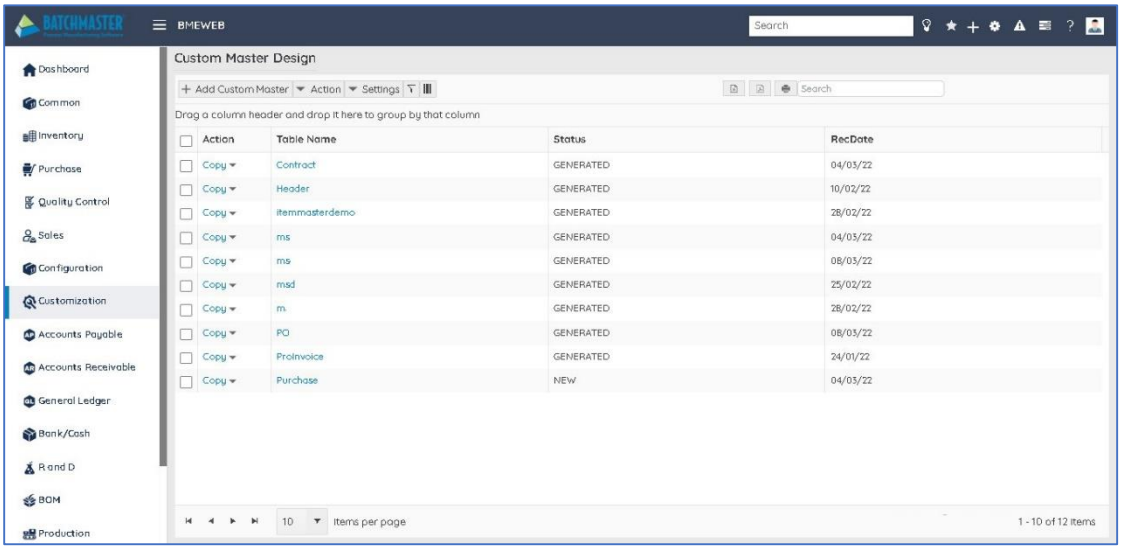


The *Custom Master Design* dashboard contains many elements that occupy 100% of the browser window. Resizing the window would resize the elements to fit. The elements can be rearranged, i.e., docked, resized, grouped, and stacked. The header and the side panel can't be rearranged.

Using the *Action* button from the dashboard you can:

- Copy an existing record to create new one
- Delete selected record(s)

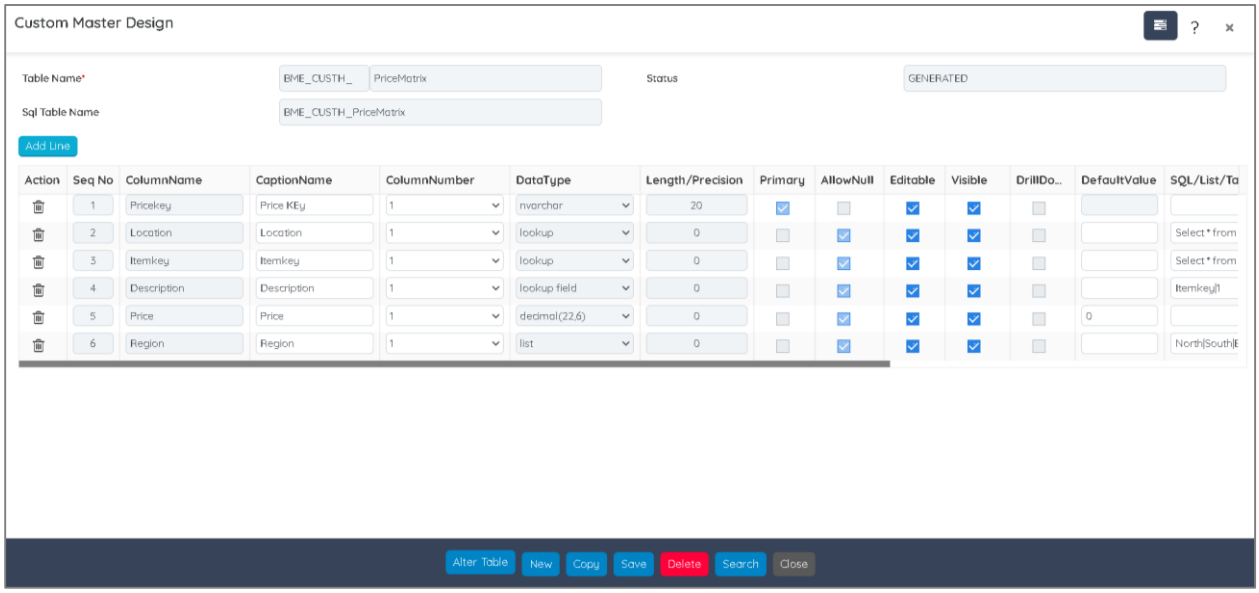
After you select all the columns of the *Custom Master Design* dashboard, the middle grid displays the selected columns.



The *Custom Master Design* dashboard provides a clear vision of the created records in a read-only mode. You can view the records as per the number of items per page specified.

Custom Master Design Screen – Add Mode

To Custom forms as per your desired interface, click the + *Add Custom Master* option from the *Custom Master Design* dashboard. The system displays *Custom Master Design* screen.



Screen Fields:

Table Name: Field is used to enter the name of the table to be created. Here the prefix of this field is fixed (i.e., Hard coded) as BME_CUSTH_. Further in the successive field you can specify the table name. Thus, the first column in the field will be hard coded and the rest is user defined. The system creates the table in SQL depending on what you have entered in the *Table Name* field.

The name (other than the hard coded prefix) can be up to 40 characters long.

Status: The field supports 2 statuses as:

- **New**: Initially the status of the created Custom screen is *New*
- **Generated**: Changes to *Generated* on generating the table for the required attributes entered for the *Custom Master* screen

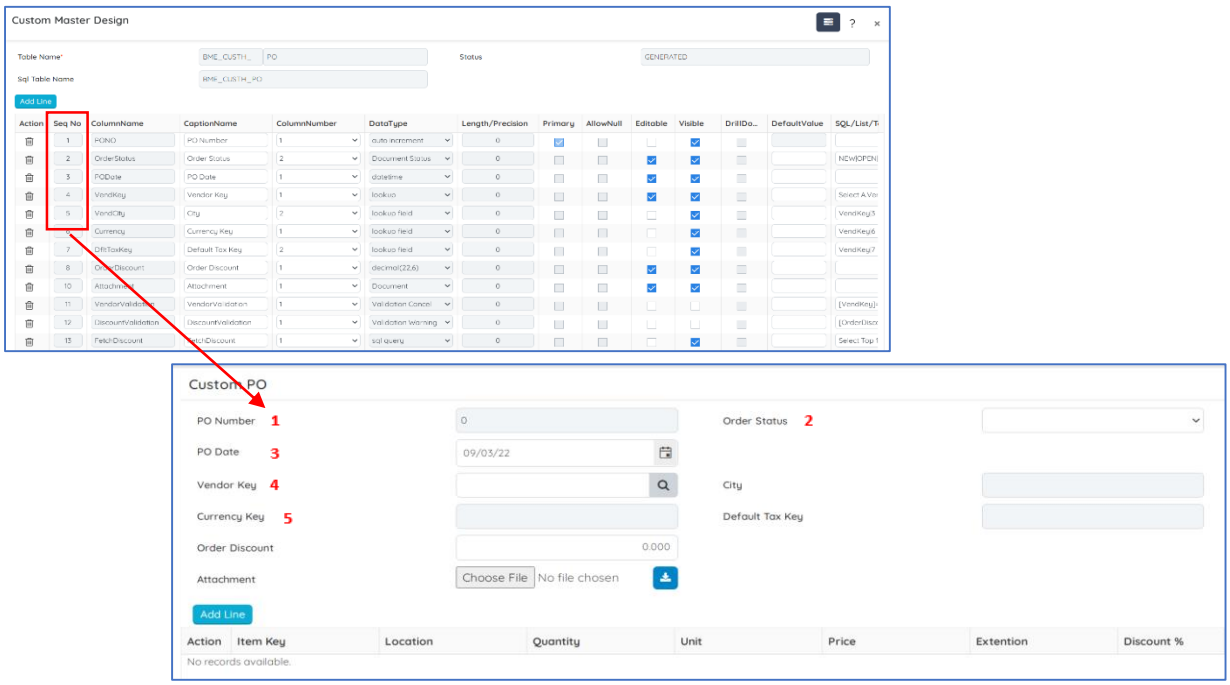
Sql Table Name: Field displays the name of the table to be created in SQL for data handling. The field value is updated as you enter the value on the *Table Name* field.

Grid Fields

Add Line: Click this button to insert a new blank line in the below grid for defining different attributes of the *Custom Master* screen. The screen supports a variety of attributes such as Sequence Number, Column Name, Data Type, Length, Primary Key, SQL Queries etc. Refer the below mentioned information for more detail.

Action  **:** Click this button to delete a row from the grid. The system provides a warning message prior to delete the line to avoid any unintended action.

Seq No: This is the row number or the sequence number for each row line that gets incremented each time you add a line in the grid for defining the attributes. The sequence defined here acts as a default sequence for the fields to be displayed on the custom screen when you log in next time.



ColumnName: You can enter the name of the columns to be added to the Custom Master screen. The column name should be a valid generic column name.

CaptionName: You can enter the name of the field i.e., the caption with the Column name that will appear on the Custom Screen.

Sequence Number	Column Name	Caption Name
1	PONO	PO Number
2	OrderStatus	Order Status

Field name or caption name on the custom screen (Custom PO).

Refer the above Custom PO Screenshot under the *Seq No* field description.

ColumnNumber: The Custom Master screen support Left and Right alignment i.e., the size of the screen area occupied by the captions or fields. The fields on the Custom Maser screen will display the screen elements as per the selection made on this screen i.e 1 implies Left and 2 as Right alignment on the screen.

Sequence Number	Column Name	Caption Name	Column Number
1	PONO	PO Number	1
2	OrderStatus	Order Status	2
3	PODate	PO Date	1

PO Number is left aligned. Order Status right aligned and so on.

Refer the above Custom PO Screenshot under the *Seq No* field description.

DataType: Display the list of supported data types for Custom Master Design. The various data types are:

Data Type	Description	Value	Example
Bit	The Bit data type is an integer data type. It is also known as the logical data type that represents the concepts of true and false.	0, 1 or NULL	bit
datetime	A date and time combination. The datetime data types are used for declaring variables for storing date and time values with an accuracy down to milliseconds. Format: YYYY-MM-DD hh:mm:ss. Adding DEFAULT and ON UPDATE in the column definition to get automatic initialization and updating to the current date and time	The supported range is from '1000-01-01 00:00:00' to '9999-12-31 23:59:59'.	datetime
decimal (22,6)	The Decimal data type (decimal (p,s)) is used to store numbers that have fixed precision and scale. • p is the precision which is the maximum total number of decimal digits that will be stored, both to the left and to the right of the decimal point. • s is the scale which is the number of decimal digits that will be stored to the right of the decimal point.	• The precision has a range from 1 to 22. The default precision is 22. • The scale has a range from 0 to p (precision). The scale can be specified only if the precision is specified. By default, the scale is 6.	decimal
float	The float data type stores double-precision floating-point numbers.	Up to 17 significant digits.	float
int	The Int data type stores a range of mathematical integers	With storage capacity of 4 bytes.	int
nvarchar	The nvarchar data type stores character data in a variable-length field. Data can be a string of single-byte or multibyte letters, digits, and other characters that are supported by the code set.	The supported character range is 4000.	nvarchar
lookup	The lookup datatype displays either a list of values that is retrieved from a table or query, or a set of values that you specified when you have created the field	Depends on what you have selected from the database table.	lookup
lookup field	Let you filter the value of the lookup. The system would fetch the filtered record based on the lookup value selected for the lookup data type.	Value is dependent on the lookup value.	lookup field

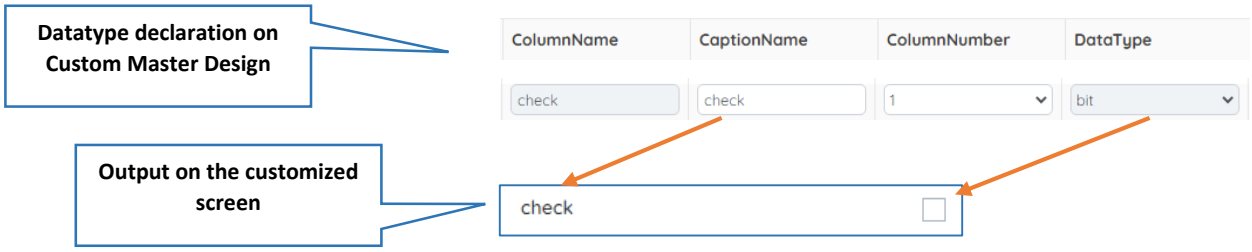
list	It is a collection type that can store ordered non-NULL elements of the same SQL data type. The List datatype is used to specify a list or a sequence that displays a countable number of ordered values on the field.		list
detail	The Detail datatype is used to define the table schema for the grid view on any wizard. The grid view will be different from the header specification. Once you have decided and defined the header values the detail datatype can be defined using the Create Details column.		detail
time	The Time datatype is used to specify the time of the day. The field supported format is HH:MM (PM/AM). If you have not entered any default time in the *DefaultValue* field, the current server time is defaulted in the time field of the form which is editable. Besides the time of the day, it can also be used to store the time elapsed or the time interval between two events which could be more than 24 hours. For example, the time elapsed since an event took place could be 72+ hours (72:00:59)		time
field separator	For character data fields, optional terminating characters allow you to mark the end of each field in a data file with a field terminator and the end of each row with a row terminator. The Field Separator datatype is used to set the delimiter of one or more characters. You can mark/unmark Visible checkbox in the Table Schema grid field to hide/unhide field separator in the form.		field separator
auto increment	Auto-increment allows a unique number to be generated automatically when a new record is inserted into a table. Often this is the primary key field that we would like to be created automatically every time a new record is inserted.		auto increment
button	This option is used to specify the button that you need in the form.		button
formula	The data type of a formula determines the type of data you expect returned from your formula. When we add this data type to grid it works as variable.	Value is derived from the equation written in column SQL/List/Table Name.	formula
sql query	SQL is a standard language for storing, manipulating and retrieving data in databases. • Act as a variable and can store result as well. • The result of this query can also be used in an equation of a formula.	Value is derived from the equation written in column SQL/List/Table Name.	sql query

	• Parameter values from GUI control to query		
Document	Adding document type field will add a field on the screen to browse and store any document with the record. After saving the record we can fetch this document from database and can save to our local system using the *Download* button next to *Browse* button.	Document can be any file on our system (Word, Excel, PDF etc.).	document
Document Status	A condition of a document indicating its relative position or state of affairs in relation to other documents and/or activities. With this data type you can set different predefined status of any record. It is identical to List data type with a minor difference that changing to the consecutive status will make the record read-only.		document status
Validation Warning	Let you validate the record before saving.	Require equation for validation in SQL/List/Table Name Column.	validation warning
Validation Cancel	This is identical to validation warning data type, but the system will not save the record.	Require equation for validation in SQL/List/Table Name Column.	validation cancel
Process Button	Let you update the record.		process button

Data Type Example

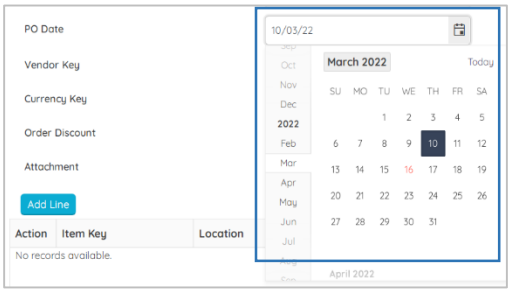
1. bit

- Stores an instance as a Checkbox, can be used to represent true value when marked and false when unmarked.

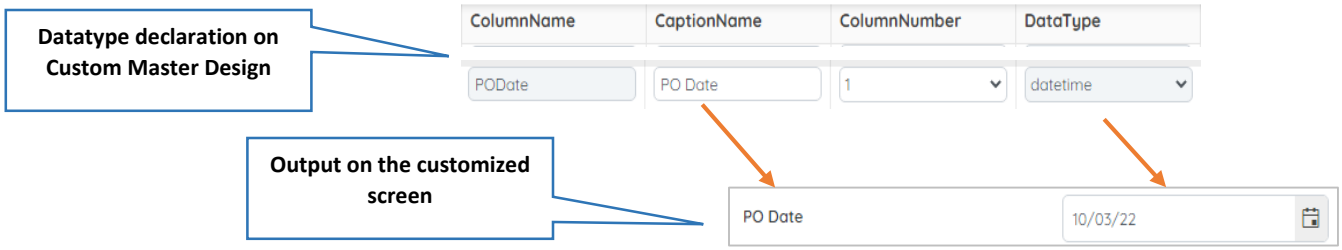


2. datetime

- Stores an instance as a calendar date
- The system inserts a popup or inline calendar on the field, with which you can choose any date



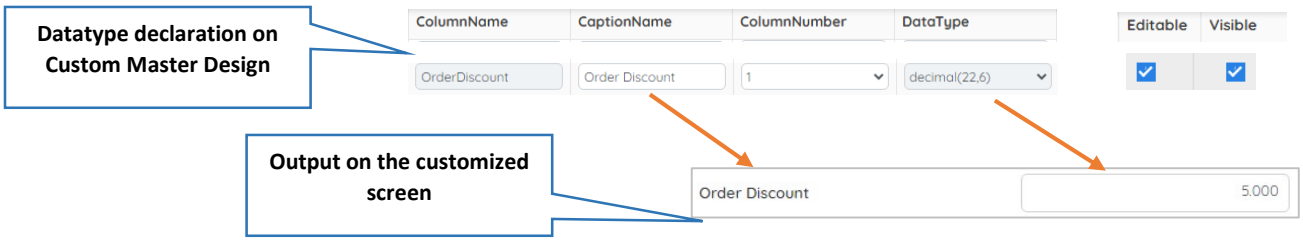
- An example of **datetime** is shown below:



3. decimal (22, 6)

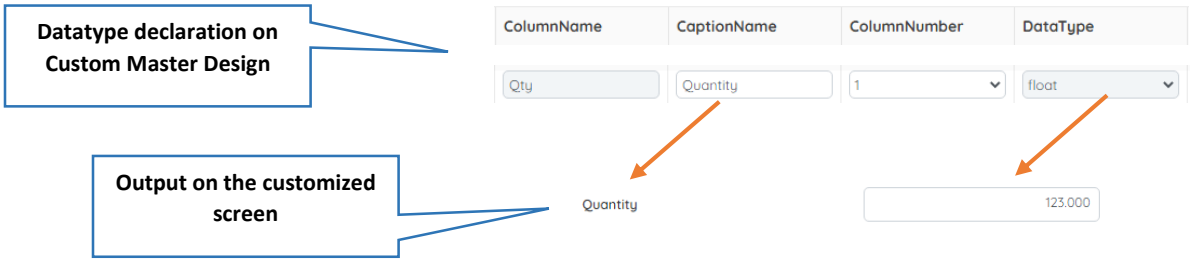
- Stores an instance as a decimal valued field
- The system inserts a field with precision and scale
- Supported form – Decimal (p,s) or Decimal (22,6)

- This datatype can be used to store the values as : Order Total, Discount, Quantity, Amount, Extension, rate etc.
- An example of **decimal** is shown below**:**



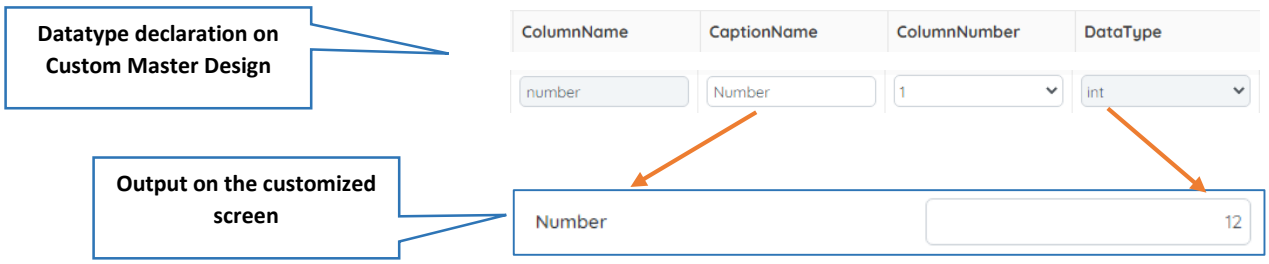
4. float

- Stores an instance as floating precision number data
- An example of **float** is shown below:



5. int

- Stores an instance as numeric value.
- The system will insert a field wherein you can type in numeric as per the specified limit.
- An example of **int** is shown below:

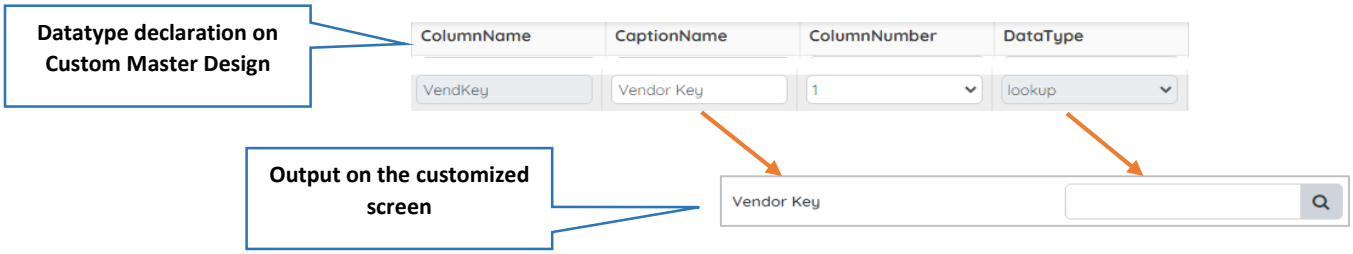


6. nvarchar

- Stores an instant as alphanumeric character string.
- The system will insert a field wherein you can type in alphanumeric characters as per the specified limit.
- An example of **nvarchar** is shown below:

7. lookup

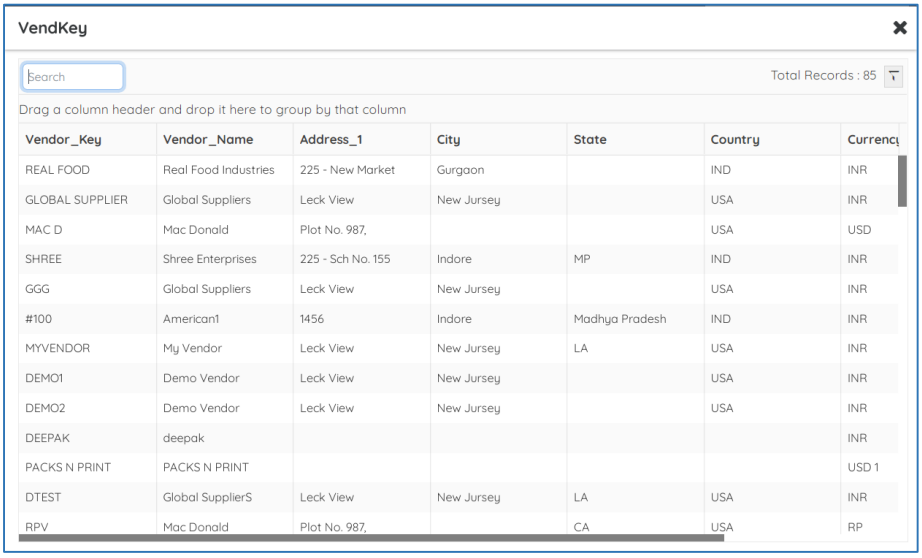
- Stores an instance as a Lookup valued field
- The system inserts a field with lookup to choose the values from. In order to provide the input for the lookup it is required to write the SQL Query at the *SQL/List/Table Name/ Formula* field.
- An example of **Lookup** is shown below**:**



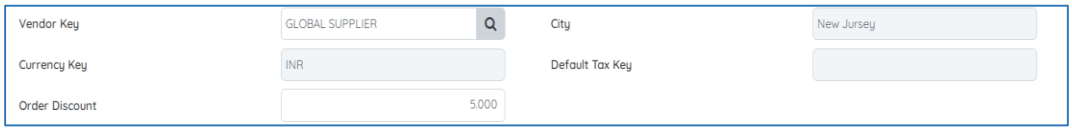
1. Say for instance you want to obtain the Vendor details on the Customized screen.
2. Define the SQL Query for the Vendor information on the *SQL/List/Table Name/ Formula* field as:

Select A.Vendor_Key,A.Vendor_Name,A.Address_1,A.City,A.State,A.Country,B.Currency_Key,A.DfltTxKey From APVend A Inner Join APClass B on A.Vend_Class_Ky = B.Class_Key

3. Thus, as you select the Vendor Key from the lookup, the system will obtain the Vendor Details from the database on a separate window. Choose the required Vendor key.



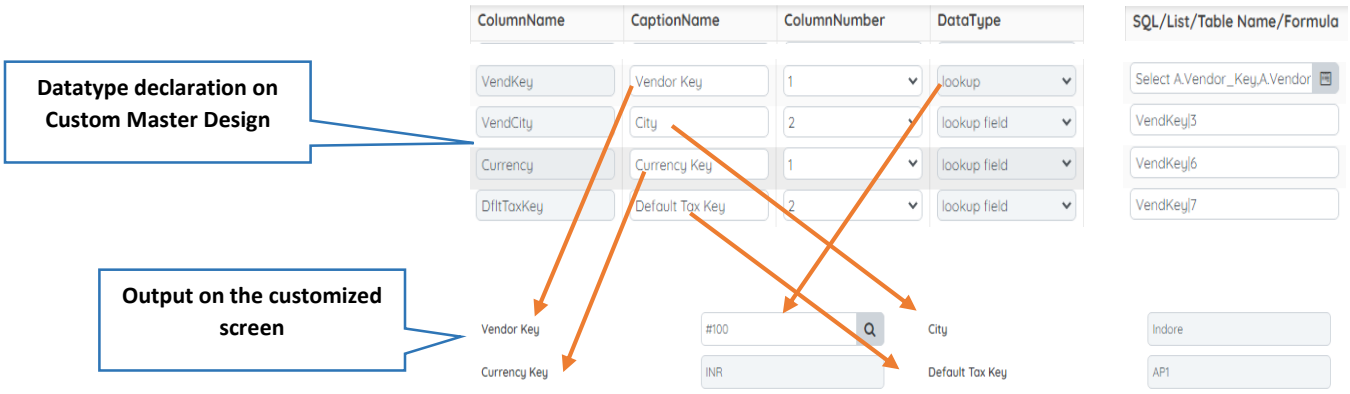
4. On choosing the Vendor Key the system will retrieve and display the other details (as specified in the query) on the screen.



8. lookup field

- Stores an instance as a Lookup valued field
- Thus, if you have defined a field as Lookup, and want to reset all the derived values when you select another record from the lookup you can use this Lookup Field data type.
- To provide the filter for the lookup it is required to write the SQL Query at the *SQL/List/Table Name/ Formula* field.
- An example of **lookup field** is shown below**:**

Example 1:



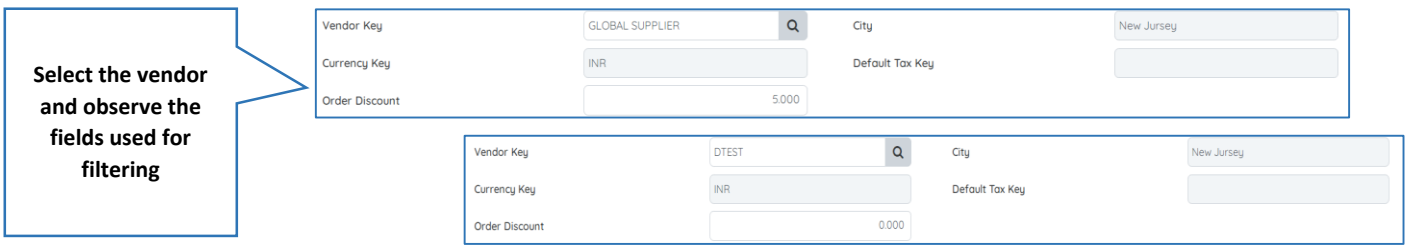
1. Consider the above example and obtain the Vendor details on the Customized screen. Select the Vendor Key from the lookup.

2. Say we want to fetch the other details of the selected record such as Vendor City, its Currency, and its Default Tax Key. Define the SQL Query for the Vendor information on the *SQL/List/Table Name/ Formula* field as:

Field	SQL with | operator
Vendor City	**VendKey|3**
Vendor Currency	**VendKey|6**
Vendor Default Tax Rate Key	**VendKey|7**

Here VendKey denotes the lookup of Vendor Key and supplied after the pipe (|) symbol will represent the column number in the Vendor key lookup. The First Column is having index as 0, second have the index as 1, third column have the index as 2 and so on.

3. Thus, while working with the Customized screen, when you select / change the Vendor Key, the system automatically reset the value of the defined fields (City, Currency and Default Tax Rate) and display the record value as per the selected vendor.



Example 2:

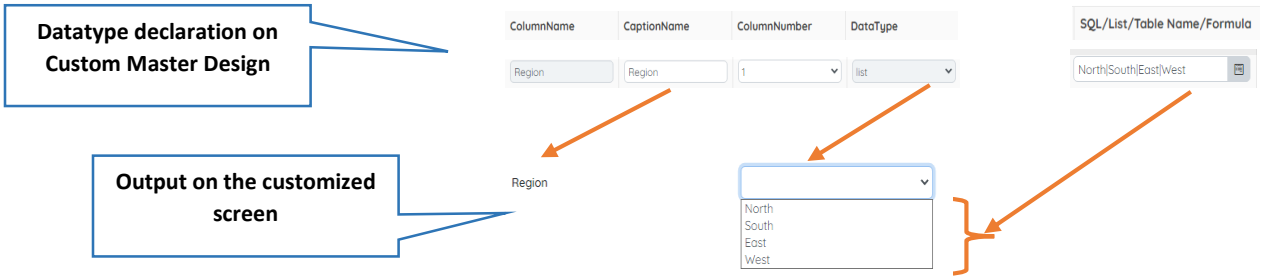
1. Say, a custom screen contains two lookups for *Location* and *Item Key*.
2. While working with the screen you want to filter the lookup record based on the selected location.
3. Define the SQL Query for the Itemkey lookup as:

Select A. ItemKey,A.Desc1 From InMast A Inner Join INLOC B on A.Itemkey= B.ItemKey Where A.Location = [Location]

4. In above SQL [Location] represents the Location Selected at UI.

9. list

- Stores an instance as a List valued field.
- The system inserts a field with list as a drop down to choose the values from. In order to provide the input for the lookup it is required to write the SQL Query at the *SQL/List/Table Name/ Formula* field.
- An example of **list** is shown below**:**

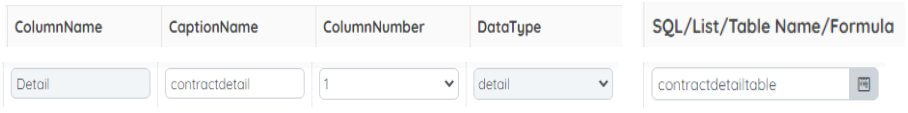


1. Say for example you want to create a list for region as North, South, East and West.
2. You need to type in the List values as North|South|East|West. You can use the Pipe (|) separator or can write in the List values on the List window.
3. The system will create the list and display the same as shown in above example.

10. detail

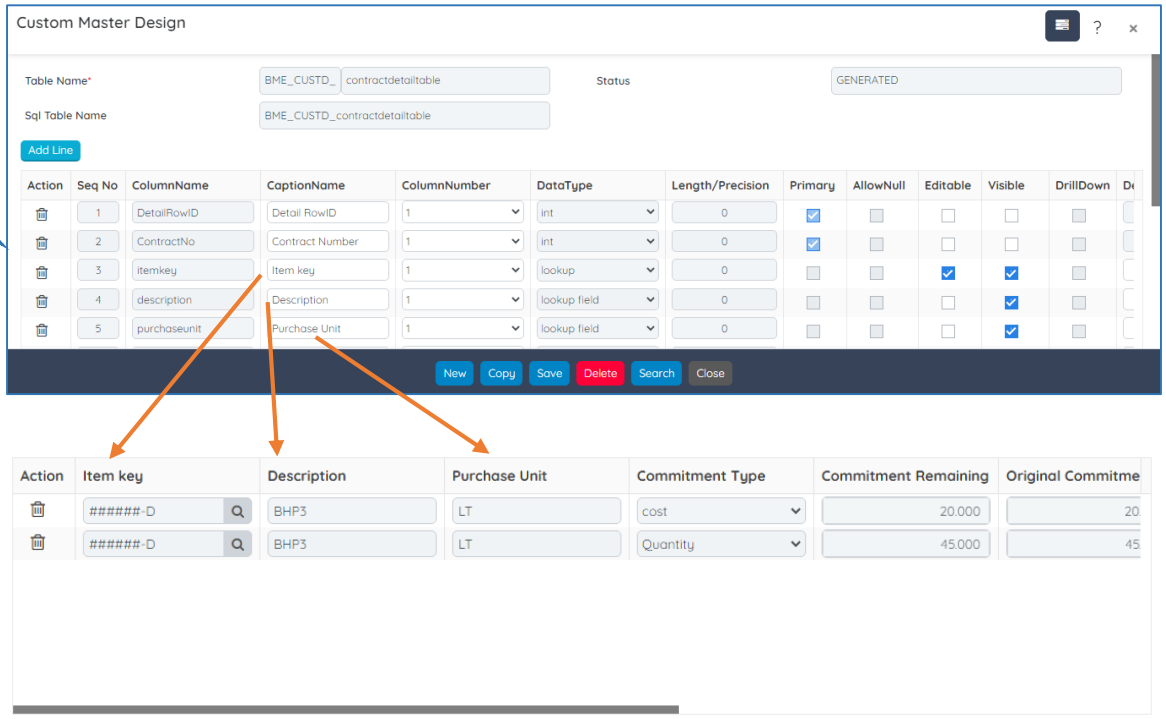
- Stores an instance as a Custom Master Design Form i.e. when you define any field as detail. Then while using this parameter system offers you to create a detailed Custom Master Design form. Through which you can define the field and column definition for the new form.
- The system inserts a table as per the table name specified at the *SQL/List/Table Name/ Formula* field.
- An example of **list** is shown below**:**

Datatype declaration on Custom Master Design



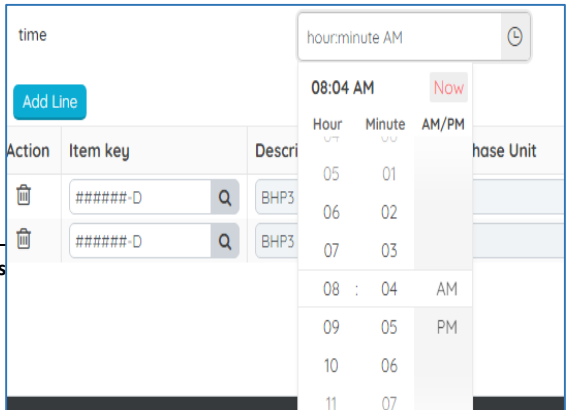
On clicking the icon adjacent to the *SQL/List/Table Name/Formula* field, a new table record *contractdetailtable* appears. Say for example you can define grid fields related to contract as *Item Key, Description, Purchase Unit* and so on.

Output on the customized screen

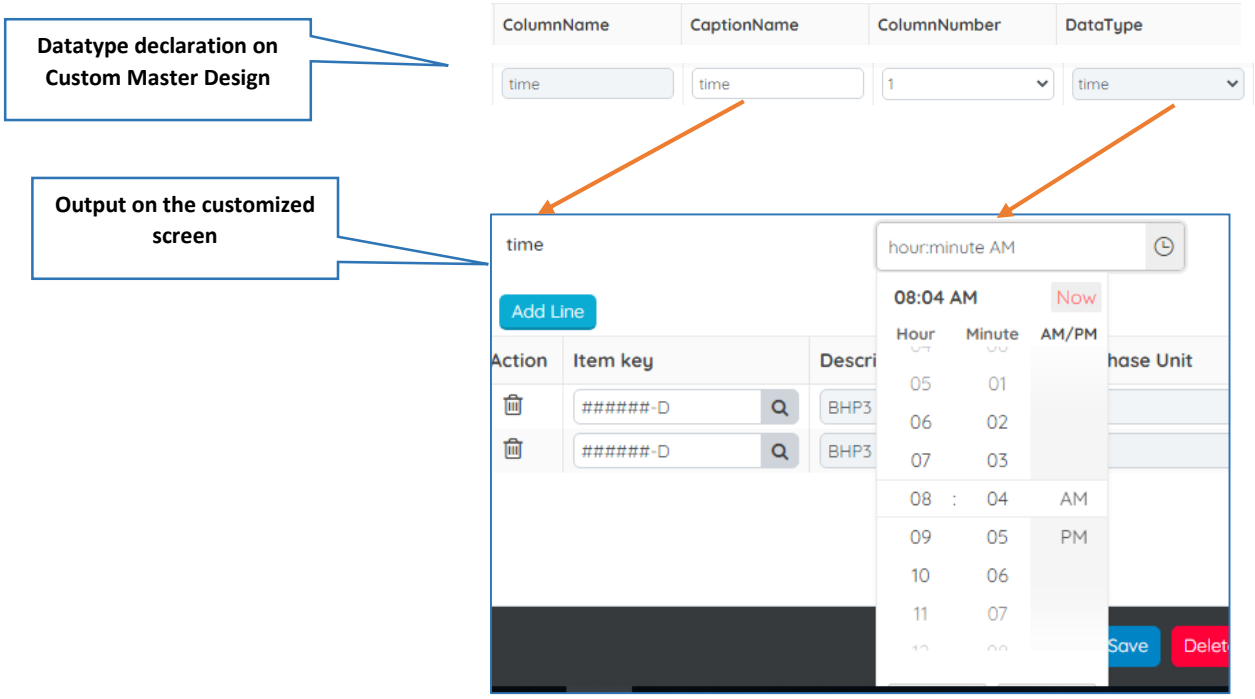


11. time

- Stores an instant as time in *HH:MM (AM/PM)* format
- The system inserts a popup time window on the field, with which you can set any time. Or you can click *Now* to set the Current system time.

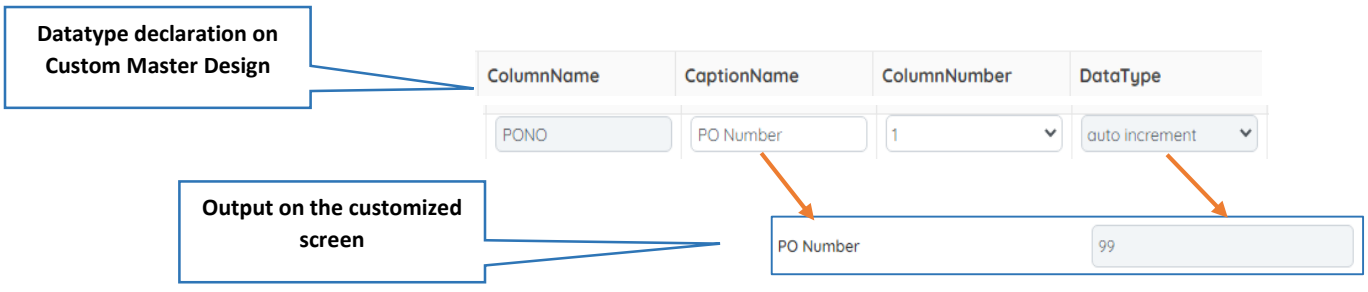


- An example of **time** is shown below**:**



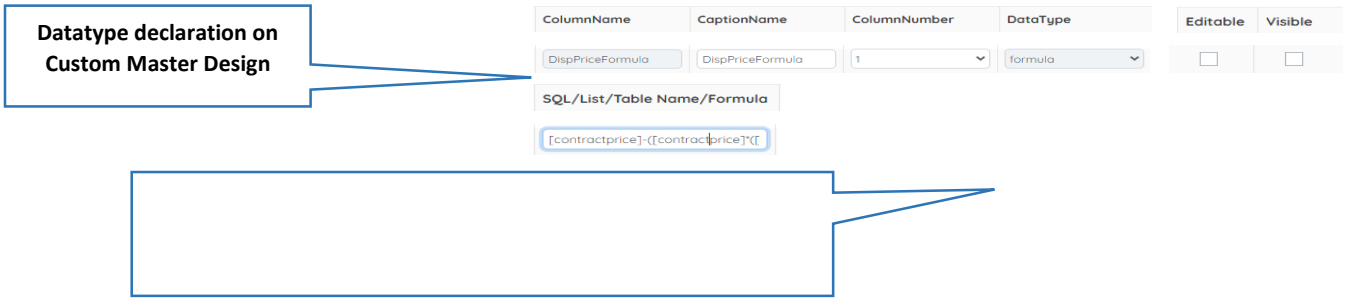
12. auto increment

- Stores an instance as a read-only field
- Each time when a record is saved the system automatically increment the value with 1.
- An example of **auto increment** is shown below**:**



13. FORMULA

- Stores an instance as a variable data type field
- The system derives the values for the field as per the condition specified at the *SQL/List/Table Name/ Formula* field.
- Output on the customized screen will be calculated as per the specified formula. No column in the table is created in the database. Also, it will not draw any control on the *Customized* screen.
- An example of **formula** is shown below**:**



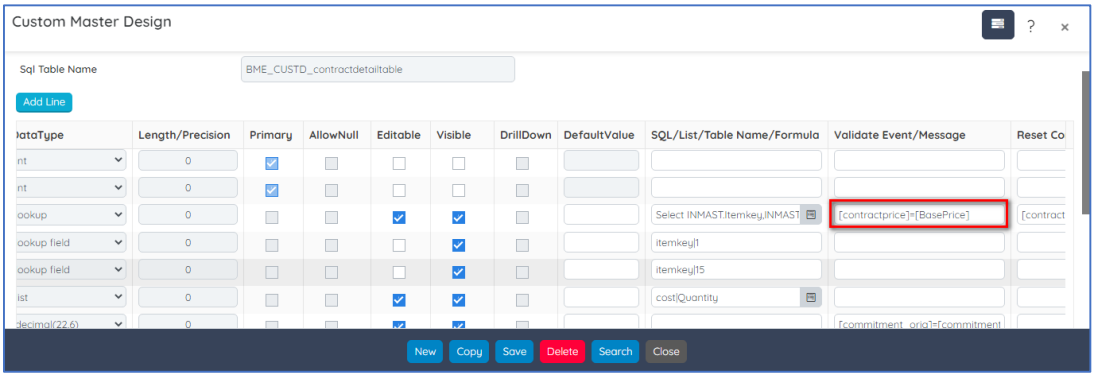
Example 1:

1. Say you have **Qty**, **Price** and **Amount** fields on the Customized screen.
2. You want to calculate amount on change of Quantity and Price.
3. Use the caption name as **ExtFormula** with data type as **Formula** and write equation as **[Qty]*[Price]** in *SQL/List/Table Name/ Formula* field.
4. Further, write [**Amount]**= **[ExtFormula]** in *Validate Event/Message* field of Qty And Price row values.

Example 2:

1. Say for example you want to calculate the contractprice as per the discount.
2. Write the SQL Query as define below at the *SQL/List/Table Name/ Formula* field.

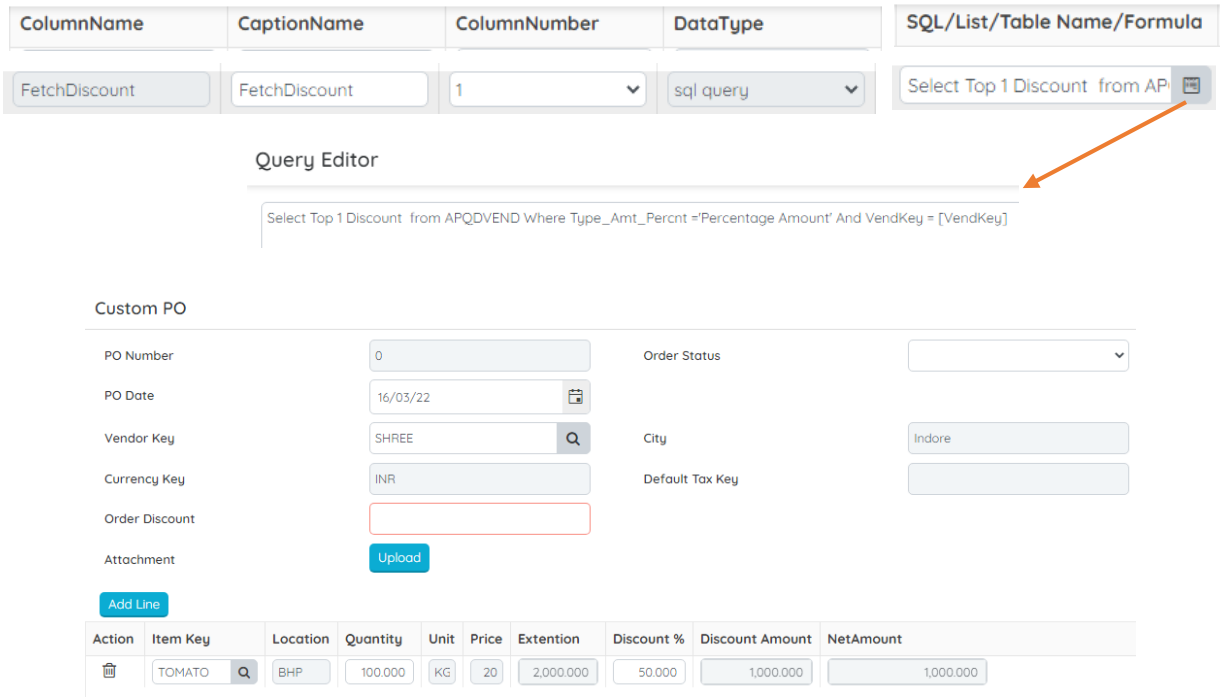
[contractprice]= ([contractprice]([DiscountPerc]/100))*



3. The system will use contractprice variable for validation purposes.

14. sql query

- This datatype will not add any UI Control on the Customized Screen nor create any field in database table to save any value.
- The purpose of this data type is if we want to fetch any record or value from our database and want to use that data on the Customized screen, to perform any calculation.
- To obtain the information it is required to write the SQL Query at the *SQL/List/Table Name/ Formula* field.
- An example of **sql query** is shown below**:**



1. Suppose we want to fetch base price from Item Location for a selected item on Customized screen.

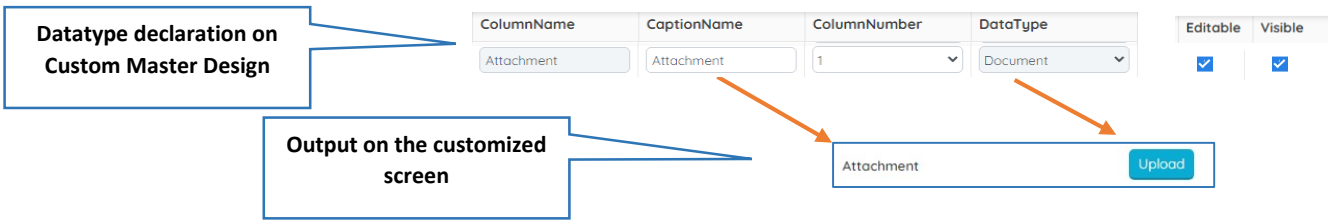
2. Define the sql query on the SQL/List/Table Name/Formula field as:

   Select Baseprice from inloc Where Itemkey =[Item Key] And Location = [Location]

3. In above Query [Item key] and [Location] values will be fetched from UI Control.

15. document

- Store an instance as an attachment on the Customized screen.
- The system will add an *Upload* button on the screen with which you can locate and can attach any file or document (Word, Excel, Powerpoint, PDF etc.) with the record.
- Once the document is attached the name and the download button is visible adjacent to the *Upload* button. After saving the record you can download the document any time on your local drive if required.
- An example of **document** is shown below**:**



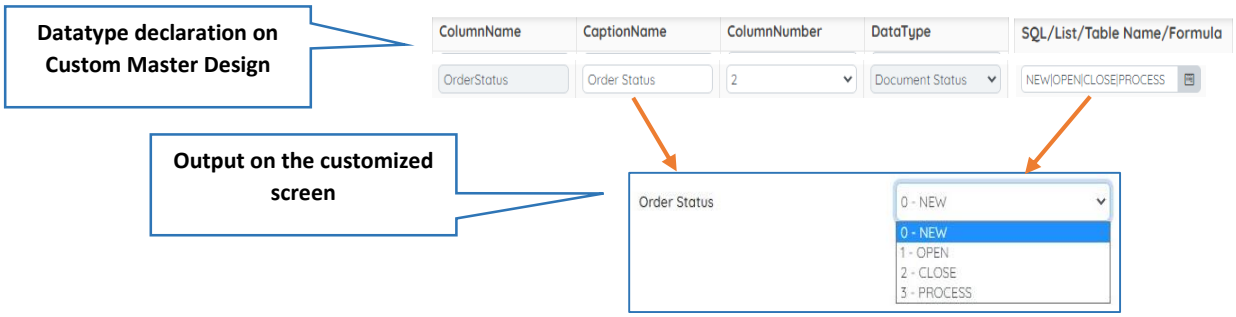
1. Say for instance you have attached a document Item Master Details.pdf with the record.

2. Once uploaded you can download it using the Download button.

16. document status

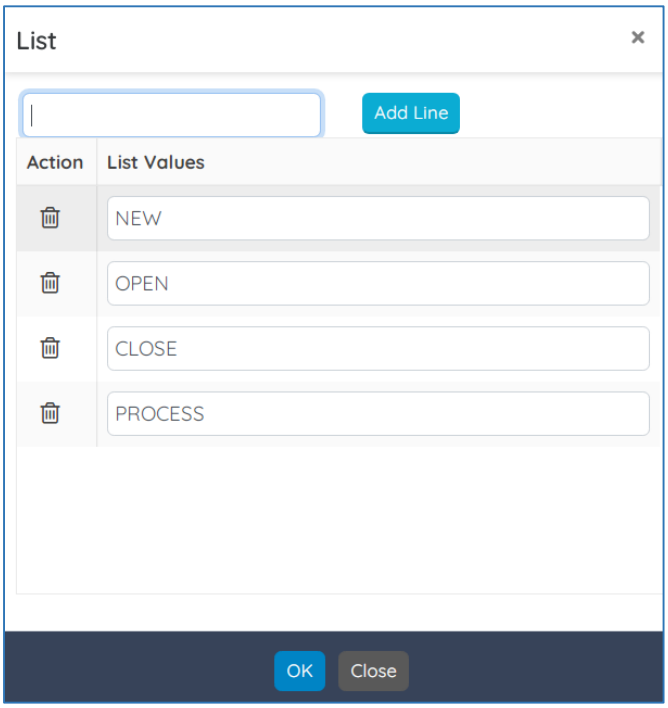
- Stores an instance as a list type field.
- With this you can maintain different document status on the Customized screen.
- The system inserts a field with drop down values. In order to provide the input for the dropdown it is required to write the status(es) with a | (pipe) separator at the *SQL/List/Table Name/ Formula* field.

- An example of **document status** is shown below**:**



1. Suppose you want to set the status of the document as New, Open, Close, Process.

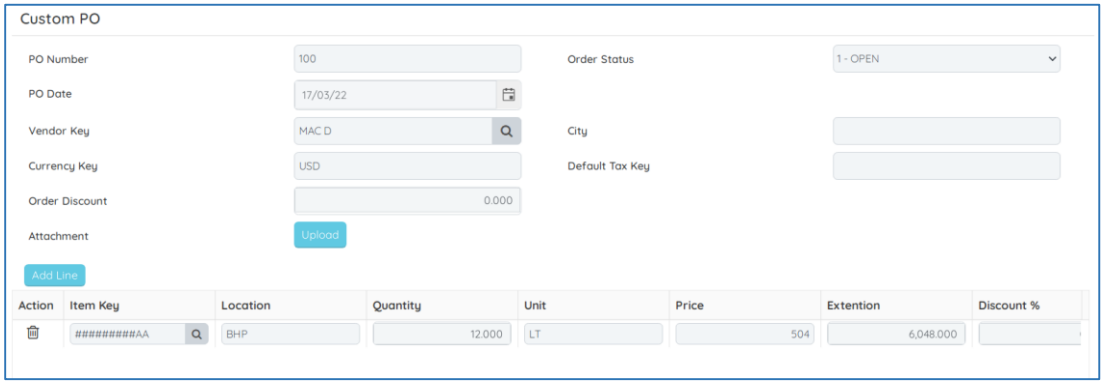
2. Define the list values for the status on the *SQL/List/Table Name/ Formula* field as:



   Or you can define the status in the field using the | separator. The system will auto create the List values defined.

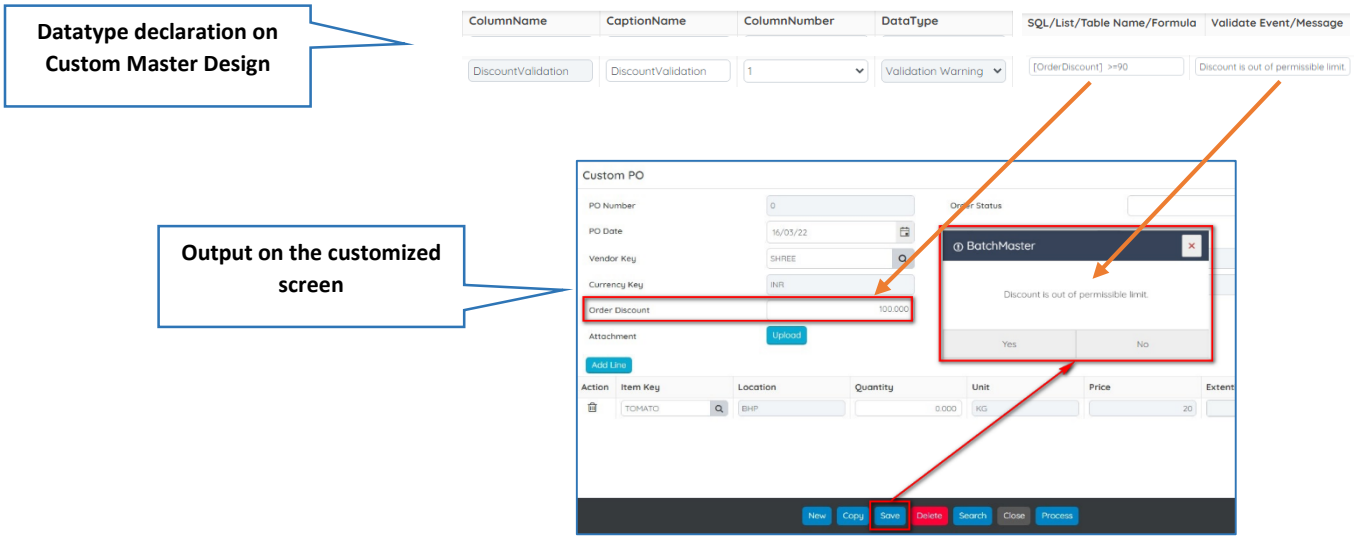
3. Initially while creating a record on the Customized screen, the first List Value will be the default status of the record i.e. New.

4. Only with the first and foremost status as New, you are allowed to make the changes in the record. Else, if you have saved the record with any other status as Open / Close/ Process the system will make the record as read-only. And you will not be allowed to make any changes.



17. validation warning

- Returns a localized message describing the validation constraints before saving the record on the Customized screen.
- In order to get the validation message, it is required to write the condition to validate the data at the *SQL/List/Table Name/ Formula* field and the message text at the *Validate Event / Message* field.
- An example of **validating warning** is shown below**:**



1. Say for instance you have Document Total field on the Customized screen and want to validate Record with Document Total.

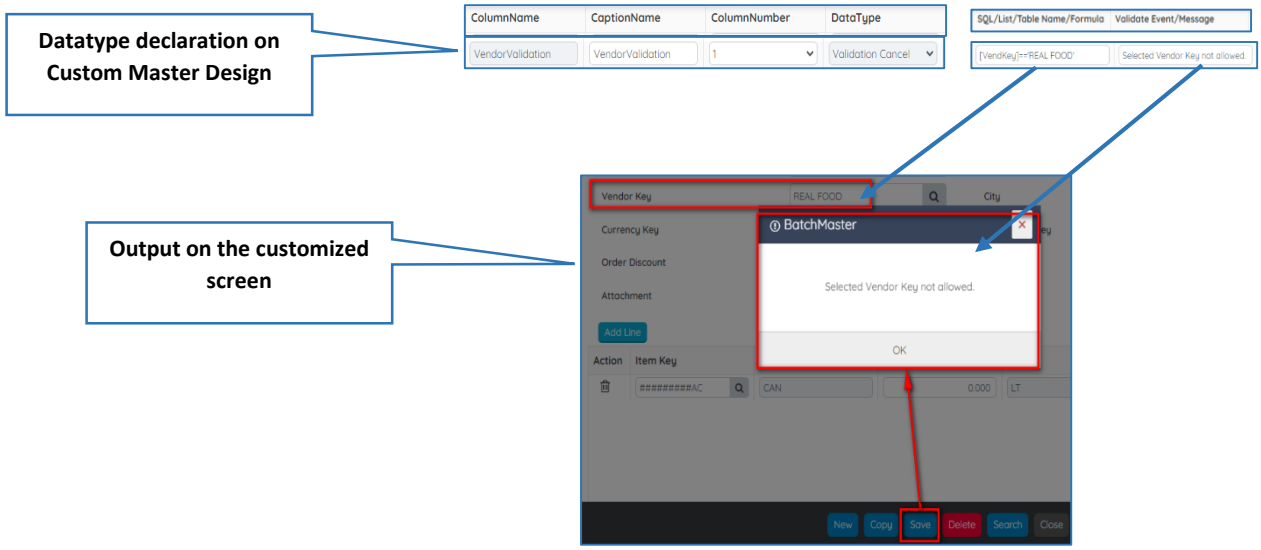
2. On the *SQL/List/Table Name/ Formula* field write condition as [DocumentTotal]>100000 and validation message in *Validate Event/Message* field as **Document Total is out of the permissible limit. Do you want to continue?**

3. If the document total is greater than 100000/- then the system will prompt the above specified message as a confirmation before saving the record.

4. The system will offer you continue/discard the changes for further processing as *Yes* or *No*. Choosing Yes will save the changes and No will not.

18. validation cancel

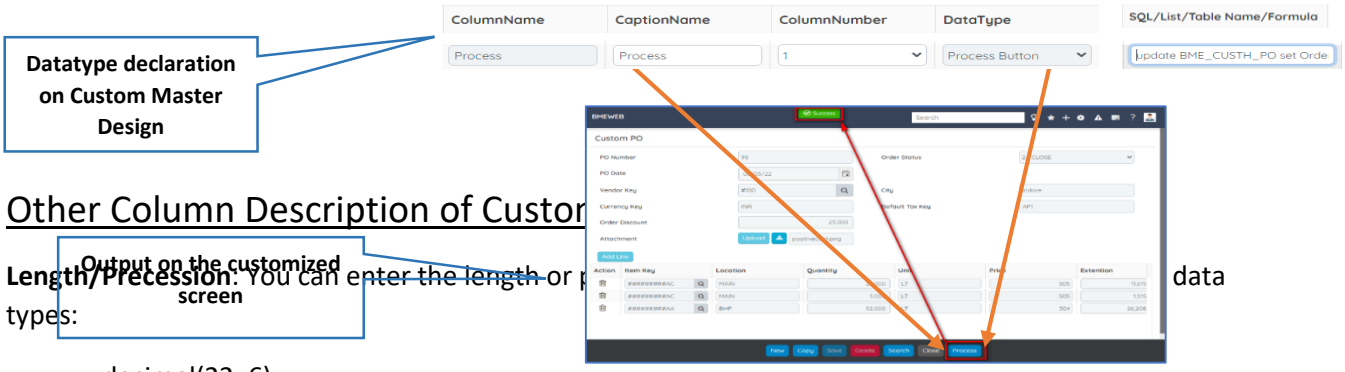
- Returns a localized message describing the validation constraints on the Customized screen and restricts you to save the record.
- In order to get the validation message, it is required to write the condition at the *SQL/List/Table Name/ Formula* field and the message text at the *Validate Event / Message* field.
- An example of **validating cancel** is shown below**:**



19. process button

- Allows you to update the record through the Customized screen after you save the record.
- In order to process and update the values in the database, it is required to write the condition at the *SQL/List/Table Name/ Formula* field.

- Before Pressing process button data must be in saved state.
- An example of **Process** is shown below**:**



Other Column Description of Custor

Length/Precession: You can enter the length or p data types:

- decimal(22, 6)
- float
- nvarchar (default value as 50)

Primary: Mark the option to make the added column as primary key, that means it is mandatory to enter a field value while inserting a record.

Allow Nulls: Marking this option allows a null value to be entered in the column / control.

Editable: Mark this option to allow editing of the fields added on the custom form. Unmarking will not allow any change. The system will not use this field value for the Auto-increment data type.

Visible: Mark this option to view the field on the custom form. Unmarking will hide the field value from the GUI.

DrillDown: Mark this field to make the lookup value as drill down you need to add on the custom master form. The system will use the field only for the Lookup data type.

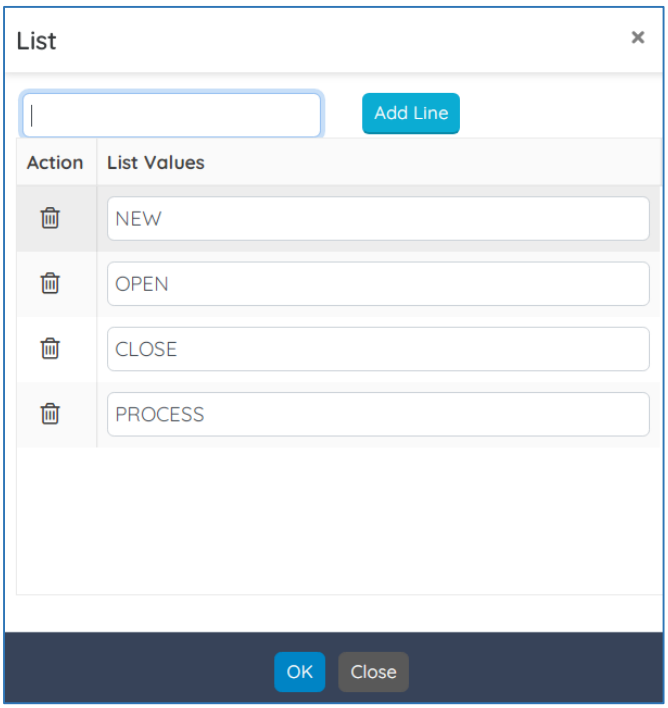
DefaultValue: This field is used to specify a default value that you can assign for the column. The value in this field will be displayed on the form while loading.

SQL/List/Table Name/Formula:

This field is used for different purpose. The table specified below list all the data type and the tool used for defining the entries.

Data type	Tool used in field for data entry
Lookup, List, Detail, sql query, validation message	SQL Query Editor
List, Document status	List values
Detail	Table Name- Custom Master Design with details

If the Data Type selected is *list* or *document status* then the conduct value column lets you enter the Default list values for the field.



New Value: Enter the field value that you want to include within the List.

Add: Click this button to add the list value within the window.

Delete: Click this button to delete the list value from the window.

OK: Click this button to save the list.

Close: Click this button to close the list value window.

Validate Event/Message: The field is used to write Equation to this column which Executes when you tab out from the control/column on the customized screen.

Reset Control: To reset the control values on change of value of a specific control add those controls name to this column.