TimeTrak
Custom Fields

2018

TimeTrak Custom Fields

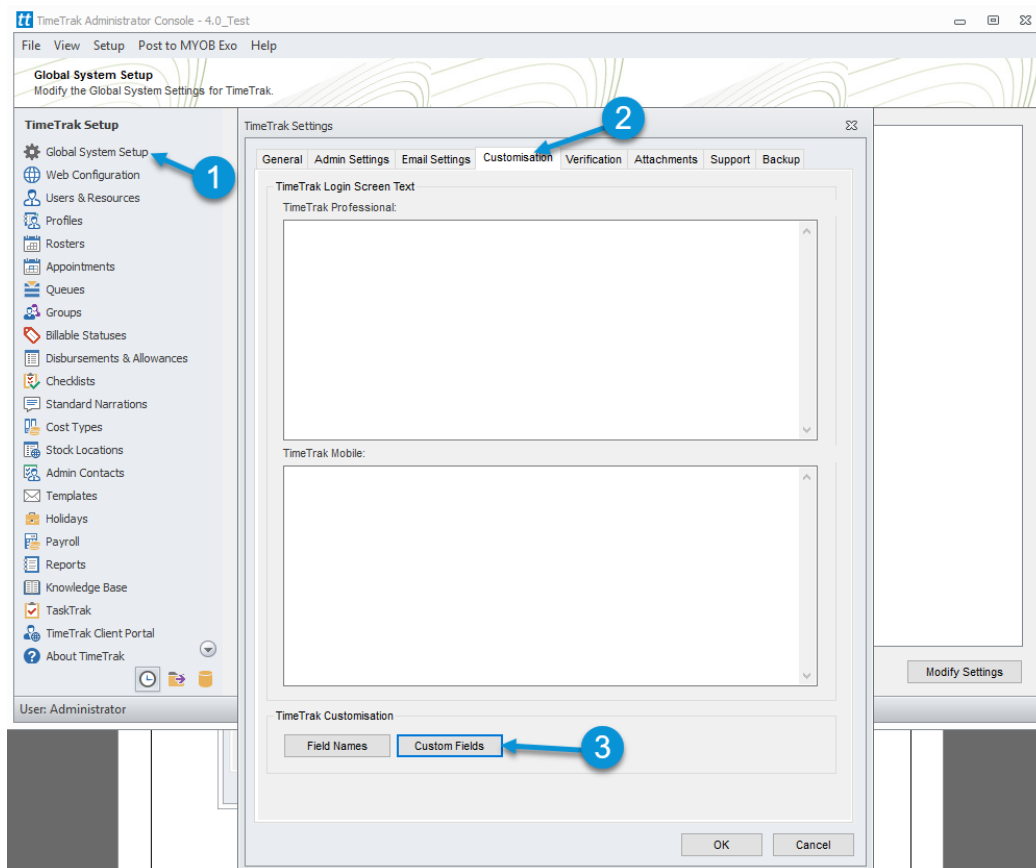## How to set up Custom Fields in TimeTrak

Many organisations use extra fields in their databases to capture information specific to their business needs. TimeTrak completely supports this functionality and extends it into custom fields in the TimeTrak database as well as the MYOB Exo database.

To set up Custom Fields in TimeTrak, log into the TimeTrak Admin Console.

Global System Setup Menu - > **Modify Settings** button

Click on the **Customisation** Tab

Click on the **Custom Fields** button

If there are out of the box fields in MYOB Exo that need to be visible in TimeTrak and are not, by default, a custom field can be added to show that field.

An extra field will need to already be in the tables at a database level for TimeTrak to be able to pick them up.

List of Tables from each database

TimeTrak	MYOB Exo
Appointment	Client (Debtor)
Disbursements (Materials)	Client (Debtor) History Note
Task	Contact
Time Entry	Contact History Note
	Job
	Job History Note
	Opportunity
	Opportunity Quote Line
	Prospect
	Purchase Order
	Purchase Order Line
	Quote Line (Job)
	Serviceable Unit
	Serviceable Unit History Note
	Supplier History Note

How to set up a Custom Field

Choose the Table Name – it will either be a table in TimeTrak or MYOB Exo.

As soon as a table is selected, a list of fields, which TimeTrak does not display by default, becomes available.

Note: If the table is from the TimeTrak database, the field name must be defined at the database level. Examples of a TimeTrak table are time entries, appointments, or tasks. Please ask your TimeTrak consultant to setup the custom fields in the database and provide the field requirement and what you are trying to achieve in your support request.

Select a field and TimeTrak will check what format is set up as in the database and pre-assign the Name, Data Type, Default Value and Control Type.

These can be altered if they are not correct.

The **Display Name** can be updated.

Options for **Data Type**:

Name	Values
Boolean	0,1
Date	datetime
Double	Float - currencies
Integer	INT – whole numbers
String	String - text

The Default Value can have a formatting rule applied to it.

Name	Expected Values
Date	Defaults to a date
Date /Time	Defaults to a date and time value
UserID	Defaults to logged in User ID
User Name	Defaults to logged in User's Name
Client Accno	Defaults to a Debtor Account Number
Client Name	Defaults to a Client's Name
Contact Seqno	Defaults to a Contacts Seqno
Contact Name	Defaults to Contacts Name

Options for **Control Type**:

Name	Values
Check Box	0,1 – shows as a tick box
Date Editor	Date - Shows as a date picker
Date/ Time Editor	Date/ Time - Shows as a date/ time picker
Drop Down List	*Please see below for more information*
Numeric Spin Edit	Numbers
Text Box	Single line of text
Text Box Multiple Lines	Box of text which allows multiple lines

Extra Functionality of a Drop Down List

When a drop down list is chosen then an extra panel expands out.

The first thing to choose is which **Lookup Database** is to be used.

A Drop Down List can be a collection of set items separated out with a "|" entered into the **Lookup Table** field. This will ignore the **Lookup Database** and just show the list.

Otherwise, select the database table, which links back to the first Field selected.

In this example, we have an Auth StaffNo for a Purchase Order, we want this to pick up the Job Cost Resource Number of TimeTrak User.

The **Lookup Value Field** needs to be the same **Data Type** as the first tables **Data Type**.

The **Lookup Display Field** can be another field, which makes it easier for the end user to select an item. For example, the ID matches the AuthStaffno but the user will see the Users.Name.

Set the **Visibility** of the Extra Field

Note all fields can be visible across all TimeTrak applications.

Choose if the field is to be **Required**, if it is **Required** then the user will have to enter a value into the field.

Choose if the field is to be **Read Only**, if it is **Read Only** then the user will not be able to edit the field.

Note: "Required" and "Read Only" settings are mirrored from the data format in the database. If it's not available to be "Required" or it cannot be rewritten, it will be shown in grey where you can't change these settings.

Once the custom fields have been set up in the TimeTrak Admin Console, then depending on the website you have allowed it to be visible in it will look similar to this:

TimeTrak Professional

TimeTrak Mobile

Populate the Field with SQL

Since the customisation field is created in the database, it is possible to use SQL query to populate the field with a different format or parameter.

To use SQL query, choose **SQL Drop Down List** in control type.

Custom Field

Field	Value
Table Name:	Job
Field Name:	X_SUQUERY
Display Name:	Service Unit
Data Type:	Integer
Default Value:	
Control Type:	SQL Drop Down List
Lookup Database:	
SQL:	
Value Field:	
Display Field:	
Visibility:	TimeTrak Professional, TimeTrak Mobile

Drop down list options:
- Check Box
- Date Editor
- Date/Time Editor
- Drop Down List
- Numeric Spin Edit
- SQL Drop Down List
- Text Box

☑ Required

☐ Read Only

Ok   Cancel

From there, you can pass any query into the SQL field. There is a **database symbol** that you can check if the query is right or wrong and next to it, there are **three dots** where you can put a parameter to the query.

Note: In this SQL query field, you need to set the first column as the primary key to be used as key information for the table and the second column is the name, description, or any value that you want to be displayed in TimeTrak.

In the above example, there is a query to show active serviceable units with the query "SELECT SEQNO,UNITDESC FROM SU_MAIN WHERE ISACTIVE = 'Y' AND CUSTOMER_ACCNO=35 union SELECT 0,'NONE' FROM SU_MAIN WHERE ISACTIVE = 'Y' AND CUSTOMER_ACCNO=35 order by SEQNO asc"

In TimeTrak, it will show the list of serviceable units for the user to select from:
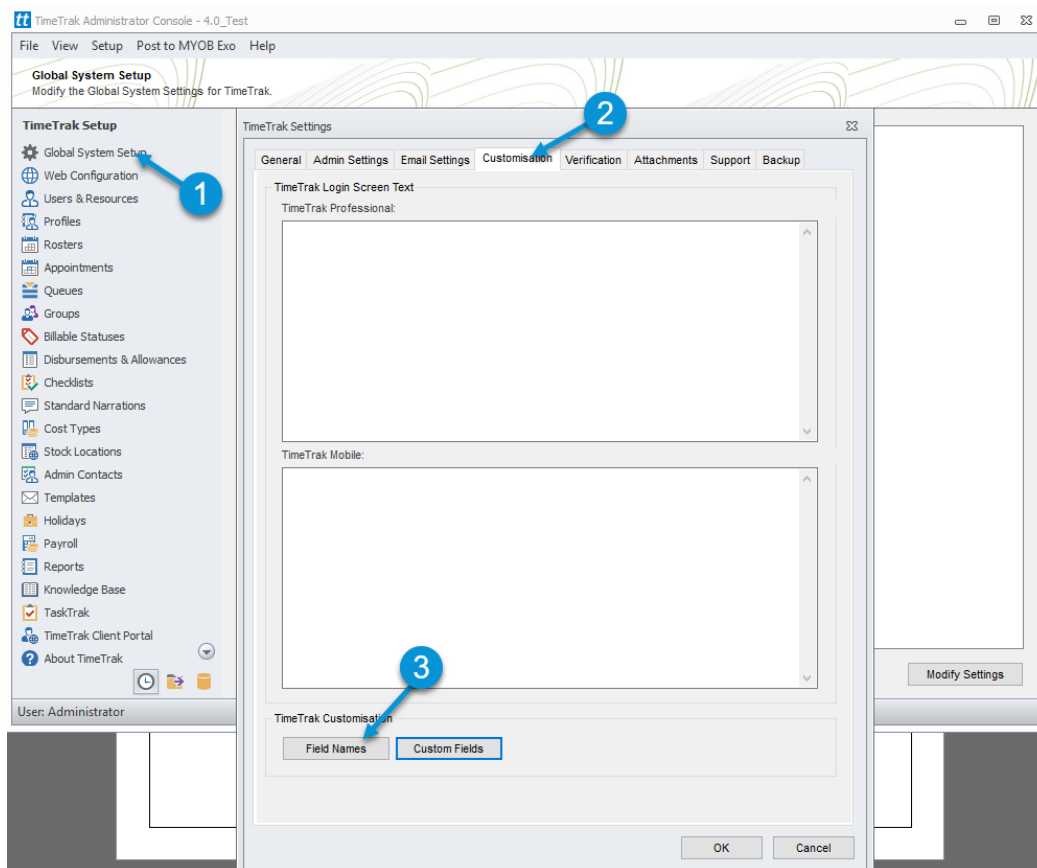
Change Custom Field Name

By default, TimeTrak calls extra fields "Custom Fields". This naming is throughout TimeTrak applications and websites.

See below example of a "Custom Field"

You can change this tab name in Admin Console in **field names** as per below

From there, change "Custom Field" singular and plural name into something that is more meaningful to your business and its processes and it will be changed in TimeTrak websites and applications.

Original Name	Singular	Plural	Past	Present
Activity	Activity	Activities		
Appointment	Appointment	Appointments		
Appointment Category	Category	Categories		
Appointment Status	Status	Statuses		
Attachment	Attachment	Attachments		
Bill Of Material	Bill Of Material	Bill Of Materials		
Check In	Check In	Check In's	Checked In	Checking In
Check Out	Check Out	Check Out's	Checked Out	Checking Out
Claim Measurable	Claim Measurable	Claim Measurables		
Client	Client	Clients		
Clock Off	Clock Off	Clock-Off's	Clocked Off	Clocking Off
Clock On	Clock On	Clock On's	Clocked On	Clocking On
Contact	Contact	Contacts		
Copy To	Copy To	Copy To's		
Cost Group	Cost Group	Cost Groups		
Cost Type	Cost Type	Cost Types		
Custom Field	Customisation	Customisations		
Disbursement	Disbursement	Disbursements		
Exo Task	Activity	Activities		
History Note	History Note	History Notes		
Job	Job	Jobs		
Knowledge Base	Knowledge Base	Knowledge Bases		
Labour Code	Labour Code	Labour Codes		
Lead Provider	Lead Provider	Lead Providers		