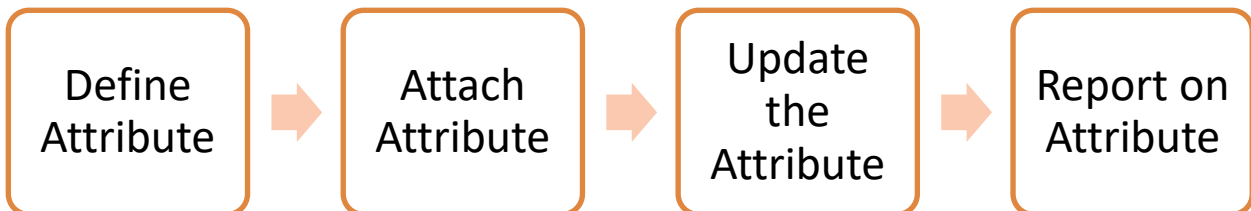


MYOB Advanced How to create a common attribute

Overview

You can create an attribute to use in the user-defined field. It can be used to store data, for example a contract number, a date that a customer started, a type of supplier e.g., utility, stock etc or can be linked to stock features.

It is a way of identifying data you wish to track and can be used in suppliers, customers, stock items and non-stock items. The data information can be brought into generic inquiry fields or reports and can be added into a generic inquiry if you have had the relevant training. The process is not documented in this process.



Step 1 – Define Attribute

In the Configuration > Common Settings > Attributes create the Attribute by clicking on +

Attributes ☆

* Attribute ID:

* Description:

Control Type:

Internal

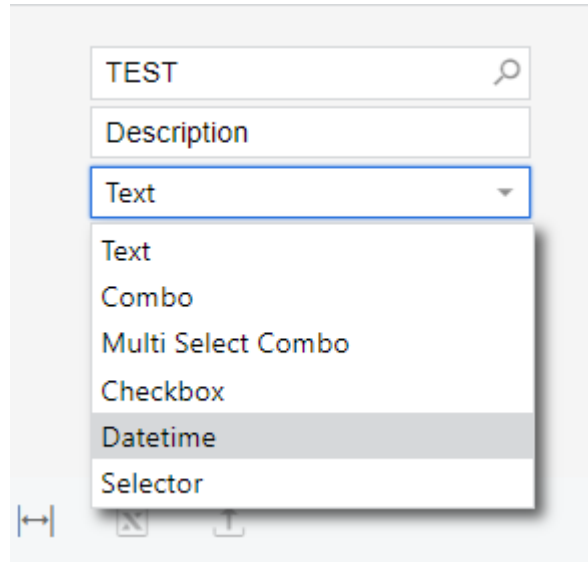
Contains Personal Data

Entry Mask:

Reg. Exp.:

<input type="button" value="Print"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>	*Value ID	Description	Sort Order	Disabled

Once the Attribute ID and Description are entered the Control Type is the type of entry the attribute will require a control type. The control type relates to the how the data for the attribute is going to be entered



For example

Text -Free text field so can enter notes or can enter a mask (e.g. L# #LL where L= Letter #= digit N3 6QG, would be allowed but NN 123 would not)



Combo or Multi Select Combo type:

1. On the table toolbar, click **Add Row**.
2. In the **Value ID** column, type value.
3. In the **Description** column, type description.
4. If needed, click the clip icon on the left and attach the file.
5. Repeat steps i-iv the needed number of times.

Combo	<input type="checkbox"/>	
DateTime	<input type="checkbox"/>	Select 1
MultiCombo	<input type="checkbox"/>	Select 2
Text	<input type="checkbox"/>	Select 3

MultiCombo	<input type="checkbox"/>	
Text	<input type="checkbox"/>	<input type="checkbox"/> Select 1 <input type="checkbox"/> Select 2 <input type="checkbox"/> Select 3

Checkbox - is just a selector box

Attribute	Required	Value
Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Datetime - Where a date can be entered

DateTime	<input type="checkbox"/>	
MultiCombo	<input type="checkbox"/>	
Text	<input type="checkbox"/>	

#	Mon	Tue	Wed	Thu	Fri	Sat	Sun
39	27	28	29	30	1	2	3
40	4	5	6	7	8	9	10
41	11	12	13	14	15	16	17
42	18	19	20	21	22	23	24
43	25	26	27	28	29	30	31
44	1	2	3	4	5	6	7

4/10/2021

Selector - Select from a different table with Advanced. This could also be a generic inquiry.

Example :-

Create

Attach

Update

Attributes

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* Attribute ID: 🔍
 * Description:
 Control Type: ▾
 Internal
 Contains Personal Data
 Entry Mask:
 Reg. Exp.:

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* Value ID	Description	Sort Order	Disabled

Customer Classes

CUSTDFT - Customer Default

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* Class ID: 🔍
 Description:

GENERAL SETTINGS GL ACCOUNTS **ATTRIBUTES** MAIL

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Active	* Attribute ID	Description
<input checked="" type="checkbox"/>	TEXT	Text

* Customer ID: 🔍 Balance:
 Customer Status: Prepayment Balance:
 * Customer Class: 🔍 ✎

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Attribute	Required	Value
Text	<input type="checkbox"/>	<input type="text" value="Text required"/>

Attach an Attribute

Assign to a field

To assign to a customer Click on Customer Class

In the Attributes tab, click on + and select the Attribute created that you wish to add.

* Class ID: 🔍
 Description:

GENERAL SETTINGS GL ACCOUNTS **ATTRIBUTES** MAILING SETTINGS

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Active	* Attribute ID	Description	Sort Order	Required	Internal	Control Type	Default Value
<input checked="" type="checkbox"/>	CHECK	Checkbox		<input type="checkbox"/>	<input type="checkbox"/>	Checkbox	<input type="checkbox"/>
<input checked="" type="checkbox"/>	COMBO	Combo		<input type="checkbox"/>	<input type="checkbox"/>	Combo	
<input checked="" type="checkbox"/>	DATETIME	DateTime		<input type="checkbox"/>	<input type="checkbox"/>	Datetime	
<input checked="" type="checkbox"/>	MULTI	MultiCombo		<input type="checkbox"/>	<input type="checkbox"/>	Multi Selec	
<input checked="" type="checkbox"/>	TEXT	Text		<input type="checkbox"/>	<input type="checkbox"/>	Text	

Note that at this stage default values can be added, and an attribute can be made to be a required field by clicking on the required checkbox.

If there are a few attributes, it may be helpful to complete in a sorted order. To create an order add a number in the sort order field

Customer Classes NO

CUSTDFT - Customer Default

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* Class ID: Description:

GENERAL SETTINGS GL ACCOUNTS **ATTRIBUTES** MAILING SETTINGS

Active	*Attribute ID	Description	Sort Order	Required	Internal	Control Type	Default Value
<input checked="" type="checkbox"/>	CHECK	Checkbox	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Checkbox	<input type="checkbox"/>
<input checked="" type="checkbox"/>	COMBO	Combo	1	<input type="checkbox"/>	<input type="checkbox"/>	Combo	
<input checked="" type="checkbox"/>	DATETIME	DateTime	4	<input type="checkbox"/>	<input type="checkbox"/>	Datetime	1/07/2021
<input checked="" type="checkbox"/>	MULTI	MultiCombo	2	<input type="checkbox"/>	<input type="checkbox"/>	Multi Select Combo	<input type="text"/>
<input checked="" type="checkbox"/>	TEXT	Text	5	<input type="checkbox"/>	<input type="checkbox"/>	Text	Enter in the contract ID

When the above fields are added into the customer class set up – the information appears like this in the new customer (note the order has changed)

Customers

New Record

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* Customer ID: Balance:
 Customer Status: Prepayment Balance:
 * Customer Class:

⚠️ GENERAL FINANCIAL BILLING SHIPPING LOCATIONS PAYMENT METHODS

Attribute	Required	Value
> Combo	<input type="checkbox"/>	
MultiCombo	<input type="checkbox"/>	
Checkbox	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DateTime	<input type="checkbox"/>	1/07/2021
Text	<input type="checkbox"/>	Enter in the contract ID

Update the attribute

When creating a new supplier, customer or item number, the attributes that have been attached to the templates for customers, suppliers, or item numbers, will be in the attribute tab of a new document.

Attribute	Required	Value
Checkbox	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Combo	<input type="checkbox"/>	Select 1
DateTime	<input type="checkbox"/>	2/09/2021
MultiCombo	<input type="checkbox"/>	Select 1, Select 3
Text	<input type="checkbox"/>	Test Customer

Enter the details required. If the required field is not completed, an error message stating that the field needs to be completed

CR Error: There are empty required attributes: 'MultiCombo'

OK