



# Optional Field Manager

## User Guide

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### **Important Notice**

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# Optional Field Manager

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Optional Field Manager lets you perform the following operations on optional fields in a Sage 300 database:

**Delete Optional Fields.** Delete fields that are no longer required from a Sage 300 database.

The selected optional field will be completely deleted from all tables, and you can optionally remove the optional field definition from Common Services. The program deletes rows and updates counts appropriately.

**Add Optional Field Values.** When an optional field is added in Sage 300, table rows are not populated with an initial or default value. However, if the optional field is required, some operations cannot be performed until a value is present.

This operation lets you provide a default value for all rows in a table or tables without affecting existing values. This operation is available for master file and setup tables, and for the G/L posted transaction table.

**Rename Optional Fields.** Rename optional fields that were spelled incorrectly or to make the field name clearer.

**Update Optional Field Counts.** Utility to fix an incorrect counts of optional field detail records stored in optional field header records.

Optional Field Manager connects directly to a Sage 300 SQL Server database. All users should log out of Sage 300 before doing optional field operations. The operations are completed in a matter of seconds.

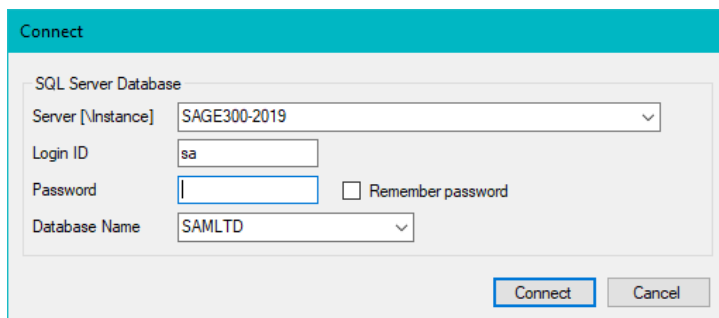
## Running Optional Field Manager

Optional Field Manager is installed and run from the Windows Start list or Windows Desktop like any other Windows program. You can also add an icon to the Sage 300 desktop to launch the program.

You can uninstall Optional Field Manager using the Windows Settings program or Windows Control Panel, depending on your version of Windows.

### Optional Field Manager Connects Directly to SQL Server

When Optional Field Manager is launched, you will be asked for a connection to a SQL Server database:



Enter in the name of the SQL Server\instance where the Sage 300 databases are stored or choose it from the dropdown. Select the "<Browse for more>" choice to browse for servers.

- Use the Delete key to remove remembered servers from the list.

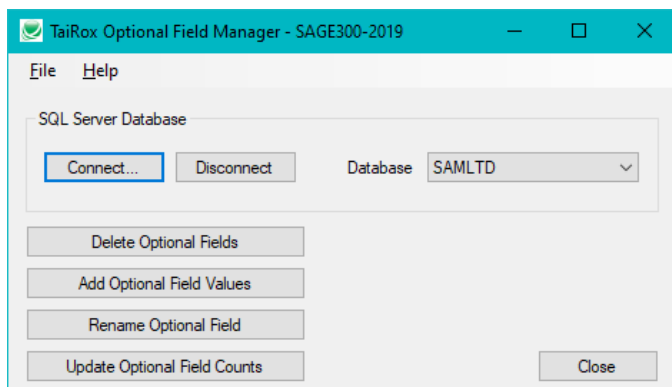
Enter the SQL Server login ID and password for a user with sufficient permissions to add and delete rows from the Sage 300 database. In this example, we've logged on as the server administrator (sa).

- Click the “Remember Password” checkbox to save the password for this login.
- To forget a password, uncheck the Remember Password checkbox.
- The login will fail if the login ID or password is invalid.

Select the database you want from the dropdown list.

- The list will include all databases on the server to which the login ID has access.

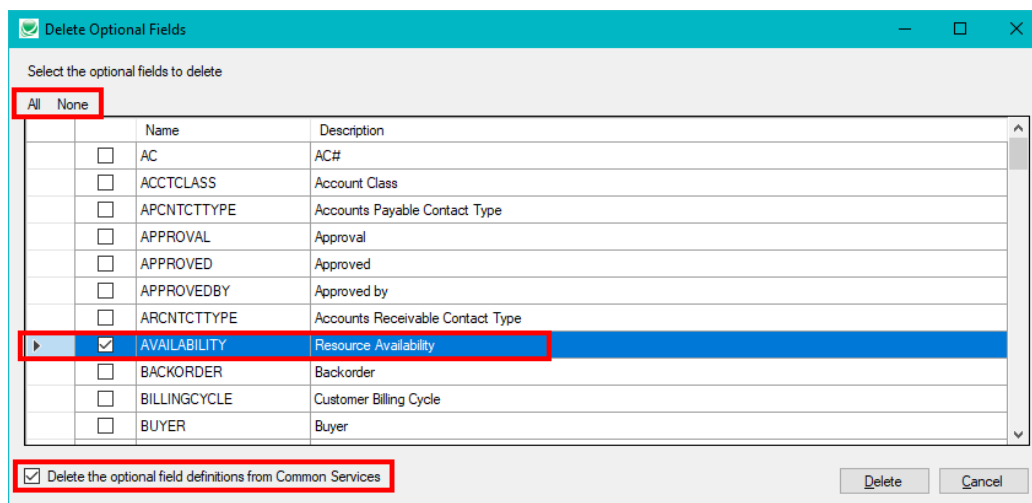
Once connected, the following screen appears.



## Deleting Optional Fields

### To delete optional fields:

1. Click the Delete Optional Fields button.
2. Select the optional fields that you want to delete.

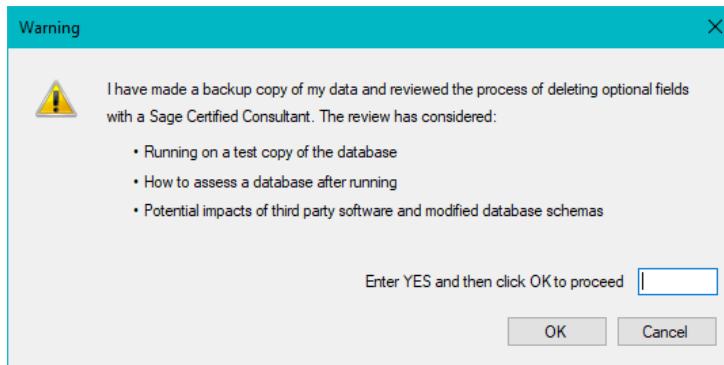


- Click All or None at the top of the form to reset your selections.
- Select each field that you want to delete.
- Click the bottom checkbox to delete the field definitions from Common Services.

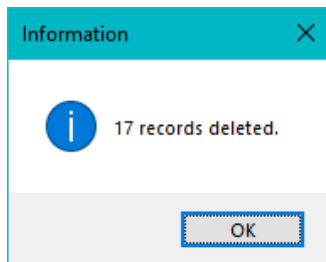
**Important Note:** If you delete Optional Fields using the Optional Fields screen in Common Services, the deletions will be blocked if the optional fields are in use by third-party SDK applications following proper optional field protocol. If you have other 3<sup>rd</sup> party products, we recommend that you delete optional fields using the Common Services function as a safety precaution.

- Click the Delete button when you are ready to continue the operation.

The program will display a warning message before any operation is performed. You must type in YES (upper case) in order to start the operation.



- Enter "YES" in the field (all caps), and click the OK button to complete the operation.
- The program will display a message showing the record count when the operation is complete:

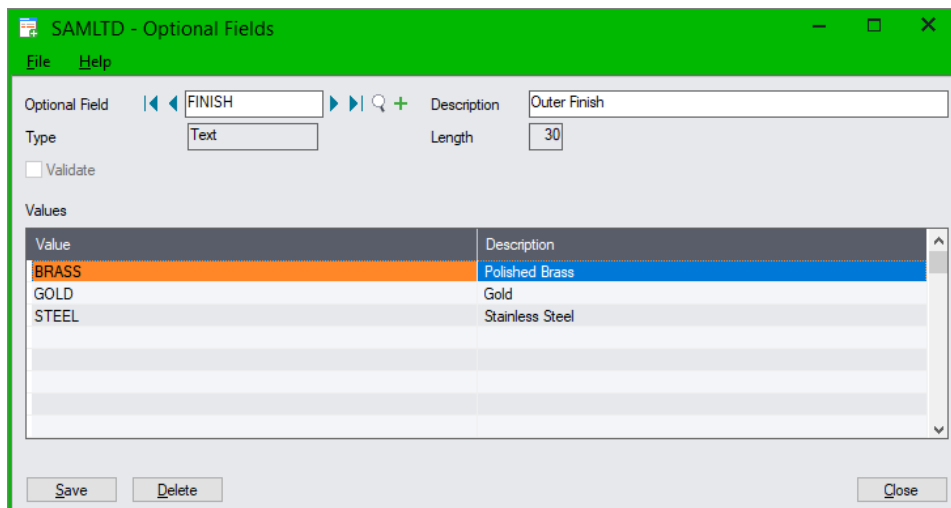


## Adding Optional Field Values

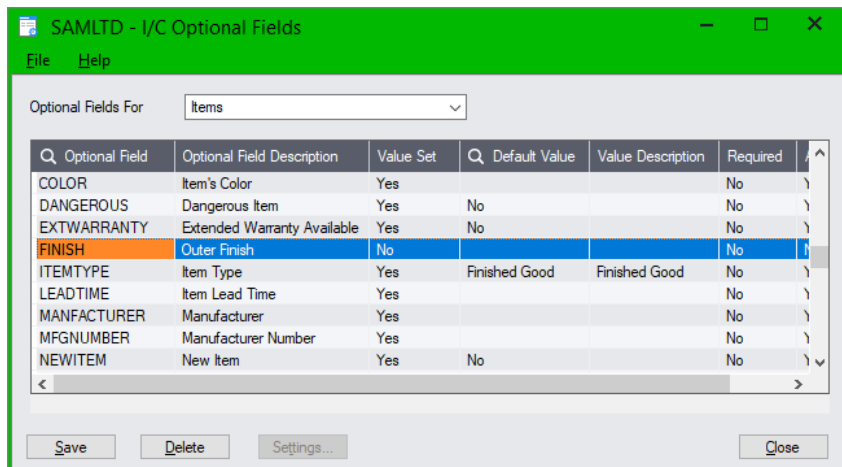
This operation lets you provide default values for optional field in one or more tables without affecting existing values. You can add optional field values to master file and setup tables, and to the G/L posted transactions table.

**Important Note:** This operation will not change values already present in the database. It will only add values to rows that currently have no value (i.e. have a null value).

Suppose that a new optional field FINISH has been added in Common Services:



Further suppose that FINISH has been added to I/C Optional Fields – Items:



You can use the Add Optional Field Values operation to populate all items in the database with a value.

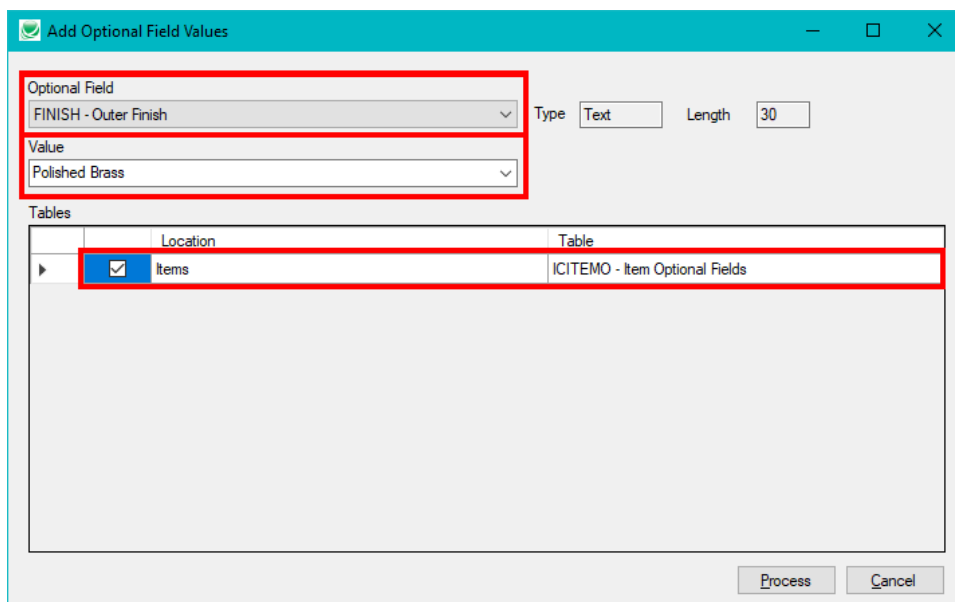
- FINISH is of type "Text".
- All optional field types are supported with appropriate variations in entry style: Text, Amount, Number, Integer, Yes/No, Date, and Time.

### To add a default optional field value:

1. Start the Optional Field Manager and click the Add Optional Field Values button.
2. Select the optional field from the dropdown, and the bottom grid will show all master file and setup tables where this optional field is used.

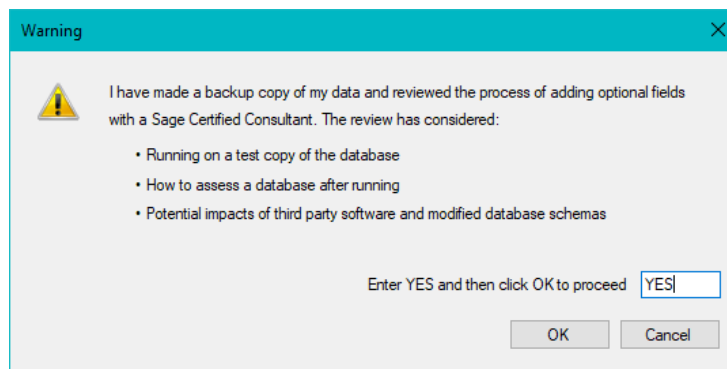
In this case, only IC - Items is displayed.

3. Select the Value that you want added as the default from the Value dropdown, and select the table where you want the value added – in this case, optional fields for IC - Items.

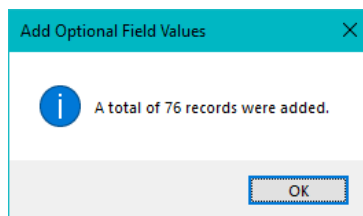


4. Click the Process button to continue, and then type "YES" and click OK in the Confirmation window that appears.

This procedure will add the FINISH optional field to all item records that do not have it, and will add the value "Polished Brass" to the FINISH optional fields that do not currently have a value.



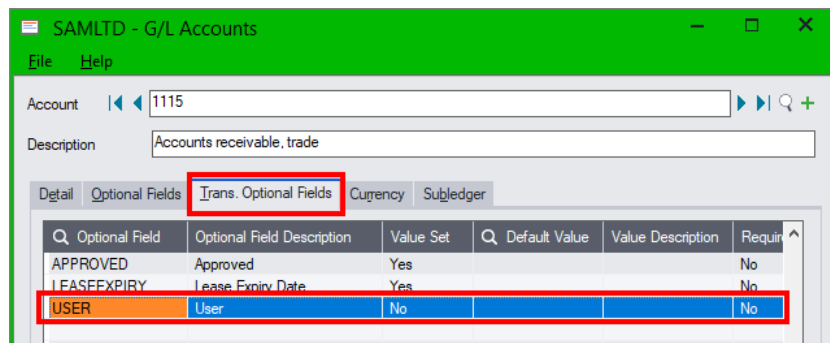
The program will display a message showing the record count when the operation is complete.



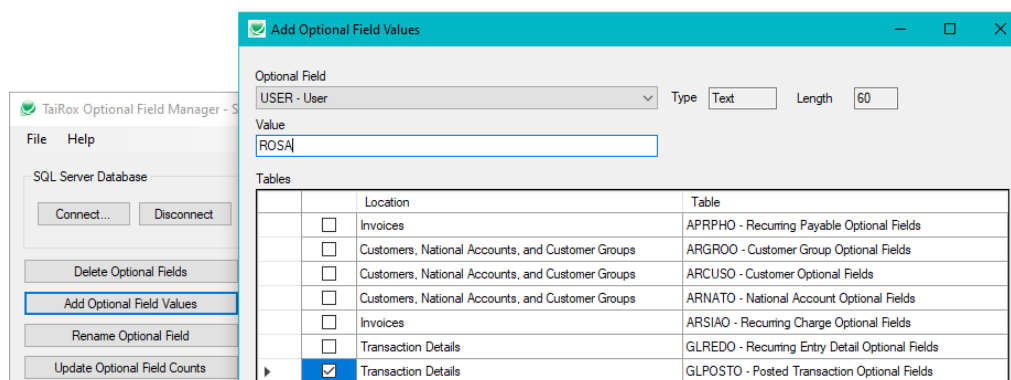
## Adding optional field values to posted G/L transactions

Optional Field Manager also lets you add optional field values to posted G/L transactions. Note, however, that the program will only add values to transactions whose accounts are set up to use the selected optional fields.

For example, the following account allows a User optional field to be added to transactions:



You can use the Optional Field Manager to add a User optional field value to all transactions for account 1115 (and other G/L accounts with User assigned to transactions) that currently do not have an optional field value.



## Renaming Optional Fields

### To rename optional fields:

1. Click the Rename Optional Fields button.
2. Select the optional field that you want to rename.

3. Enter a new field name and description for the field.
4. Click the Process button. The program will display the following warning screen:

5. If you are ready to proceed, type "YES" (all caps), and click the OK button.

When the process is finished, the program will list the number of records that were changed:

## Updating Optional Field Counts

**Note:** You usually run this utility because the TaiRox Fast Data Integrity Check has listed specific errors with optional fields. (You may see similar errors running Sage 300's Data Integrity Check.)

Sage 300 has a header record for optional fields that includes a count of the number of optional field detail records for each optional field. If this count has been corrupted, you may see error message like this when you run TaiRox Fast Data Integrity.

```
Checking optional field count in table PMCONTT - Contracts...
Contract [1]: The number of optional fields is incorrect.
Contract [2]: The number of optional fields is incorrect.
Contract [3]: The number of optional fields is incorrect.
Contract [4]: The number of optional fields is incorrect.
Contract [5]: The number of optional fields is incorrect.
```

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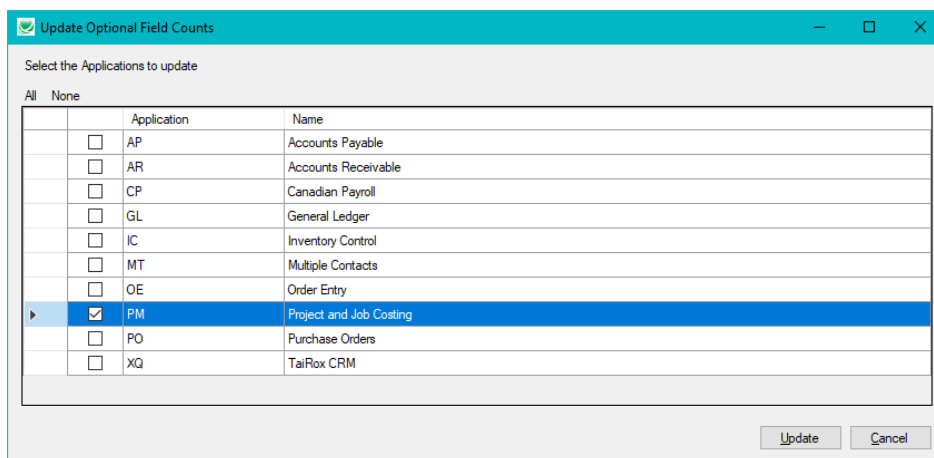
Checking optional field count in table PMCATGT - Contract Categories...
Contract Category [1, 32, 1000]: The number of optional fields is incorrect.
Contract Category [1, 32, 2000]: The number of optional fields is incorrect.
Contract Category [1, 64, 1000]: The number of optional fields is incorrect.
Contract Category [1, 64, 2000]: The number of optional fields is incorrect.
Contract Category [1, 96, 1000]: The number of optional fields is incorrect.
Contract Category [1, 96, 2000]: The number of optional fields is incorrect.

```

This utility recalculates and updates the optional field detail counts to correct the problem.

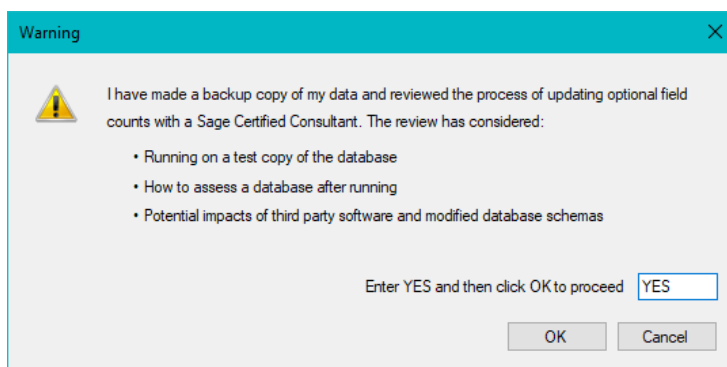
### To update optional field counts:

1. Click the Update Optional Field Counts button.
2. Select the applications for which you want update the optional field counts. To fix the errors in the above messages, you would select Project and Job Costing.



3. Click the Update button when you are ready to continue the operation.

The program will display a warning message before any operation is performed. You must type in YES (upper case) in order to start the operation.



4. Enter "YES" in the field, and click the OK button to complete the operation.
5. The program will display the following message when the operation is complete:

