

Overview

Synergy for MAX provides fields for customer use to adapt Request forms to suite specific requirements. These fields are referred to as "Free Fields."

There are different types of Free Fields for difference types of data like; text, numbers, dollar values, etc. This document explains the different field types and their uses for customizing Synergy Requests.

Free Fields for Requests are maintained by clicking on the Workflow/Setup/Request Types option, then selecting the desired Request to edit, then clicking on the Fields tab to display a list of fields for that Request. This pages provides capabilities to add, delete and move fields on a request.

Free Field Types:

- **Free Yes/No** – this provides up to five different Yes/No or True/False checkboxes on the request for Boolean entries. An example is shown below:

Realized

Processed

- **Free Date** – provides up to five different user defined dates like the following:

Calibration Scheduled Date

- **Free GUID** – A "GUID" is a Global Universal Identifier value that is used in Synergy as a unique value for Requests, Documents, Accounts, Contacts, Transactions and Items.

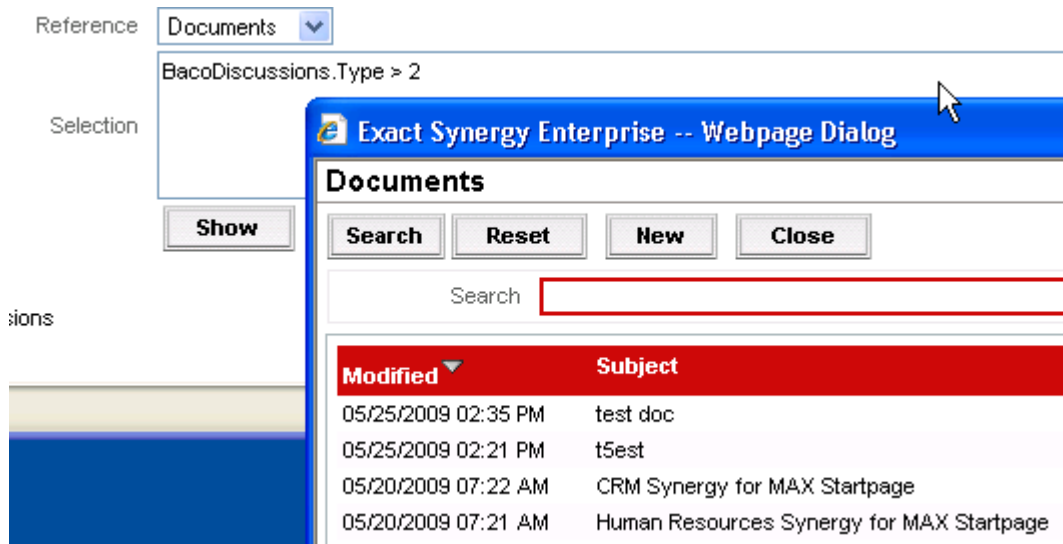
Reference

Selection

- Requests
- Documents
- Accounts
- Contacts
- Transactions
- Items

This provides up to ten different links these types of values to a Request. For example, an Associated Document could be added to request or a link for a Reference Account could be added.

GUID fields provide for a Selection option to add conditions to the logic to list values in this entry. This uses SQL WHERE clause logic. For example, the Document Type could be used to select only certain document types for an associated document field using the BacoDiscussions.Type field like this:



The SHOW button pops up the results of the Selection WHERE clause as shown above.

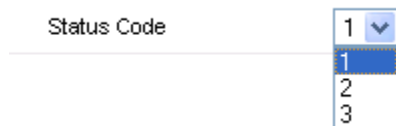
- **Free Number** – provides up to five different values and do calculations can be added to a Request that include simple numeric entries or the result of a calculation from two fields; like extended purchase value (price x quantity).

Number fields provide a Calculation section with an Operator field as shown below:



The Free Number can be the result of Field1 and Field2 and the Operator.

A Free Number can also be used for a drop-down list of entries that need to be stored as numbers. This is handy when there is a logical sequence the values; like a Status Code. The following is an example:



- **Free Amount** – provides up to five different Amount fields used for currency values and are the same as Free Numbers, expect that they are a currency type.
- **Free Text** – provides up to fifteen different Text fields are used to store text data. They can also be used to link to Synergy Projects and Items in the same way Free GUIDs can be linked.

There are 15 Free Text fields and each one is limited to 60 characters of data.

Other Request Fields:

There are many other fields that can be added to Requests. The following are notes on some of these of special interest.

- Account and Contact – These can refer to a Customer and Contact Name or Vendor and Contact Name.
- Start Date/End Date – These two fields are required for a request to show on the Calendar. (Note the Actions tab, Calendar flag also needs to be turned on.)
- Items 1 and 2 – Can be used to link to Synergy Items providing two separate links. Synergy Items can be MAX Part Numbers or any other coding scheme based on the Item Assortment. Items can be used for Training Classes, Tooling and other values. Field Quantity 1 and 2 are associated with Item 1 and 2.
- Related Request – This entry is used to denote the Request ID that created a Request as a result of a Copy process in Synergy. It points back to the Source Request and is valuable in tracking back the Request that spawned the current Request.
- Projects, Opportunity and Document refer to and associated Project, Sales Opportunity or Document in Synergy like the Related Request.