Record Types

Last Modified on 03/12/2018 9:32 am EDT

Record Types

A Record Type defines the nature of a record. *Customers* and *Sales Orders* are examples of Record Types. Each Record Type has one or more Properties, also known as Fields. Properties will generally be things such as *numbers* or *text* but may also be another record type. All Entities have an Id.

Record Types are divided into *Entities* and *Transactions*. **A Customer is an Entity** while a **Sales order is a Transaction**. Generally we use Entities to create Transactions and other Entities. For example, *Terms* is a Profile List entity that is used in Customer and Sales Order.

There may be a *parent-child relationship* between two Record Types. For example, a single customer may have one or more contacts; therefore, the Customer is the Parent and the Contact is the Child.

Each Record Type view is fully customizable by utilizing the Filter List pop-up menu. The available filter options are *dependent on the record type and its properties*.

In summary *Entities* can be defined as a:

- **Major Entity** that describes a person, object or place. This includes, among others, *customers*, *leads*, *items* and *locations*. You access these Major Entities through the *Full List d*rop-down.
- **Child Entity** that describes a single to many relationships between parent and child relationships. For example, *contacts*, *addresses* and *attachments* on the Customer screen.
- **Profile List** are helper entities used in *Major entities* or *Transactions*.

Transactions

A Transaction describes something that is happening with one or more Items. For example, *items* that are being *bought*, *sold* or *used* in production. A Transaction can be either posting or non posting. When you post a transaction, your inventory gets affected. All transactions have *TranType*, *DocNo* and *Date* properties.