

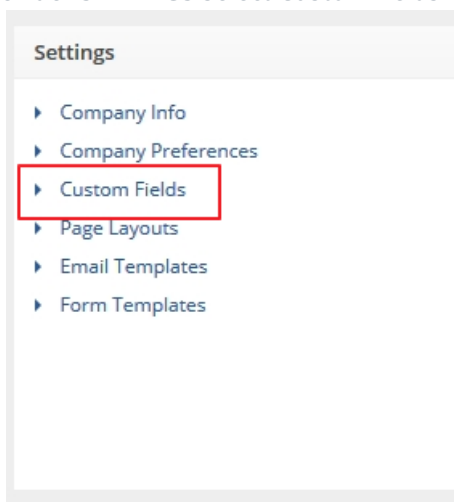
Custom Fields - Sales Order Items - Pick List

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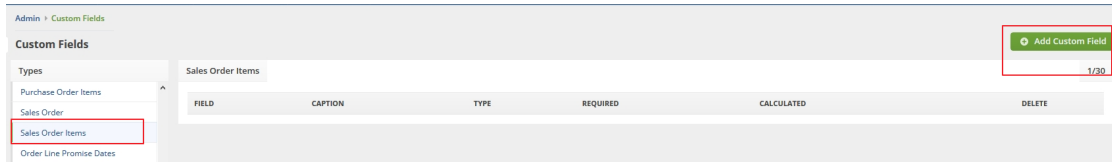
This is a very specific guide to create a pick list for Sales Order Items

For the main guide to custom fields, head [here](#).

- Log into OT as the admin (or a user with Admin role)
- Go to the admin panel (top right corner)
- Under SETTINGS select Custom fields



- Select SALES ORDER ITEM and then click ADD Custom Field



- Create a caption for your field and choose what type of field you would like to create. In this case, you will want to use Primarily "PICK LIST" type fields. You can then enter the values that you want to show in that fields pick list. You can also select if you would like that field to be required. (example below)

Custom Field Editor

Caption: Material/Stock

Required:

Type: Pick List

List Values: Material 3

Name	Delete
Material 1	<input type="checkbox"/>
Material 2	<input type="checkbox"/>

- When you create a new Sales Order, you want to add the column to the Document. Select the Items tab--> click on the Gear Icon--> go to the columns tab --> choose the column that you created--> click ADD

Sales > Sales Orders > Sale Order

Sales Order - 67

General: No. 67, Customer Dr. Smith, Date 10/21/2019, Promise Date 10/21/2019, Customer PO Contact

Bill Address: SMILE FACTORY

Ship Address: SMILE FACTORY

Items | Details | Memo & Instructions

LINE NO. ITEM DESCR

List Options

Filters | Columns | Other

Available columns:

- Line Instructions
- Manually Cleared
- Manufacturer Part No.
- Margin %
- Markup %
- Material/Stock**
- Net Available
- On SO
- Open Amount
- Std. Cost

Selected columns:

- Line No.
- Item
- Description
- Quantity
- Filled
- UOM
- Price
- Ext.
- Tax Code
- Cleared

- Now when you add an Item to that order you will be able to select your custom field options.

Items | Details | Memo & Instructions | Custom | Payments | Ship Docs | Dependency | Attachments | Open Activities | Activity History | New Tab

Name/Number: Search Item

LINE NO.	ITEM	DESCRIPTION	QUANTITY	FILLED	UOM	PRICE	EXT.	TAX CODE	CLEARED	AVAILABLE	OPEN QUANTITY	MATERIAL/STOCK	ACTIONS
1	Straw 1" diamater		1	0	EA	0	0.00	Non	<input type="checkbox"/>	0	1	Material 3 Material 1 Material 2	

*** Please note: after you add the field to the Sales Order, you must refresh your browser before it will work properly.