Entry Form Assignment

Business Example: You have set up all your fields in a customer record, but you need to organize the content so that it is easy to manage the data. Some of the fields are always entered and should be at the top (i.e Customer Email) and some of the fields hold data for reporting and don't need to be seen. Your customer record needs to be organized for make data entry more efficient.

1. Create an Entry Form for a customer record
    a. Uncheck "Enable fields editing on lists
    b. Uncheck "Store form with record"
    c. Check "Form is preferred"
    d. Check "Use for Pop-ups"
2. Label the form "Business Standard Customer Form"
3. Add "My Business Information" as a field group to the main section
4. Place fields like Company Name under this field group.
5. Move the 'My Business Information' field group above Email | Phone | Address
6. Create a new field for "My Business Information" labeled "Rep Supervisor" and add an employee into that field. (Hint: use an entity field for customer records)
7. Under "Fields," move the email field to the primary information field group
8. Place the 'email' field in the middle of the primary information content
9. In actions, change the label of the "Save and New" to "Save and New Customer"
10. Under the relationships subtab, change the "Contacts" sublist label to "Business Contacts"
11. Add your newly created field to the "Quick View"
12. Save the Form
13. View your changes and test the impact
    a. Uncheck "Enable fields editing on lists
        i. Are you able to edit when you are in the customer list?
    b. Check "Form is preferred"
        i. Did you check preferred in the list after saving?
    c. Check "Use for Pop-ups"
        i. See if you can find a place that might use a pop up customer record
    d. Inspect your new fields, organization, and field groups
    e. Look at a Quick View in another record that would link to a customer

Lecture Notes
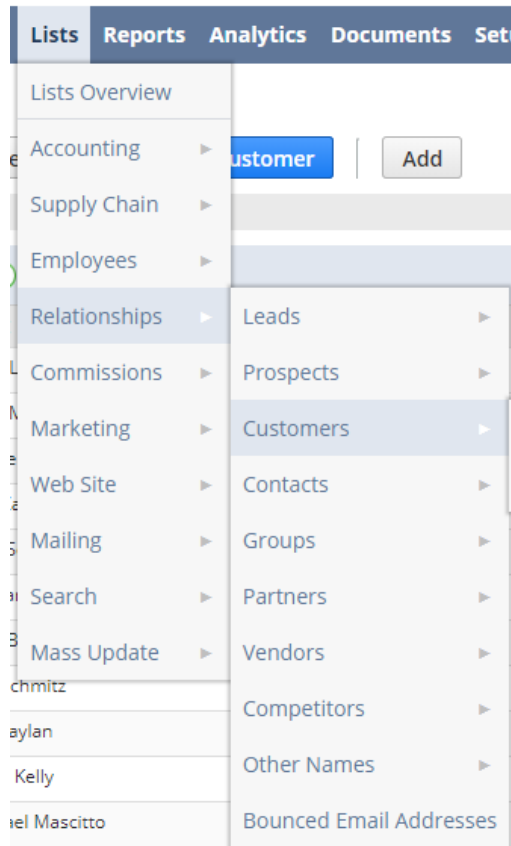

Figure 1: Navigation to the Customer Record

- Take a look at this SuiteAnswers article highlighting more details about creating custom entry and transaction forms.
- This entry form article will help you understand the definition of each field
- Learn more about the Quick View subtab with this SuiteAnswer article