


# Custom Table Maintenance

 As a Table Maintenance solution is always custom, consultation with Commerce Vision is required to implement this feature.

- [Overview](#)
- [Configure Table Maintenance Settings](#)
  - [1. Enable Table Maintenance](#)
  - [2. Create and configure a table](#)
- [Allow a CMS User access to Table Maintenance](#)
- [Additional Information](#)
- [Related help](#)

## Overview

The content published on your website, whether for products, users etc, are stored as records in database tables. Each record contains data organised across several fields. Certain tables and fields come standard for functions and features of your [Customer Self Service eCommerce Platform](#) website. For instance, product details are stored in a table with specific fields for description, images, product code, and so on.

What if your business wants to be able to maintain an entire non-standard table online? This is what the Table Maintenance feature does. It provides a simple integrated way to create and maintain custom tables in the CMS. What a custom table is for depends on your specific business needs! It could be a table from the ERP that certain staff can access and edit online, such as an existing price book. Or the price book could be a completely new table that will be maintained and accessed entirely online. Both possibilities and more can be custom Table Maintenance solutions.

Once implemented by Commerce Vision, Administrators can add one or more custom tables and records to the CMS, as well as set permissions for record maintenance and viewing. When a User first accesses a table's maintenance page (via the navigation menu), the list of all records are displayed. They can then find the record they want to view or update, then click Edit to enter into the record's details.

What the user can see and do in both the Search List and each record's page are set by the Administrators in Table Maintenance.

### Search List page

This is an example of the Search List page. When the custom table was set up, permission to add records was enabled.

Price Book - B2B - List Items

Q Search:

Search

Search

Reset Search

Brand Text	Product Code	Product Description	
	C09002	Table Cloth - Blue Check	Edit
	C09001	Table Cloth - Red/White Check	Edit
	BR015	Sandwich Press	Edit
	BR010	Cooltouch Toaster - 4 slice	Edit
	BR003	Wok N Grill Red - Non-Stick	Edit

### Record page

This example is a record from our price book has set them to editable. \* indicates mandatory

Price Book - B2B

Table Cloth - Blue Check

Price Book - B2B

Brand Text \*  
Homeware

Brand Text Product  
C09002

Product Code \*  
C09002

Product Code  
C09002

Product Description \*  
Table Cloth - Blue Check

Description of the product  
Category Code \*  
SK120

DescriptionLine2 \*  
Table cloth blue check

Picture 1

IsReturnable \*  
yes

Sales Blocked \*  
0

Cost Price \*  
\$100.00

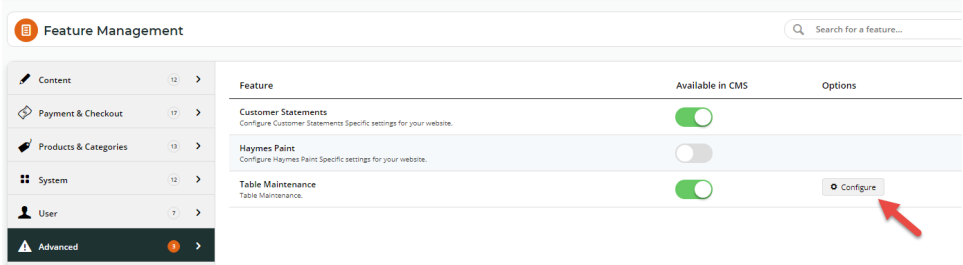
## Configure Table Maintenance Settings

**NOTE** - This guide assumes that Commerce Vision has configured the required custom tables and fields to be made available for selection in the CMS. In order to demonstrate the feature's functionality, the examples shown use generic fields.

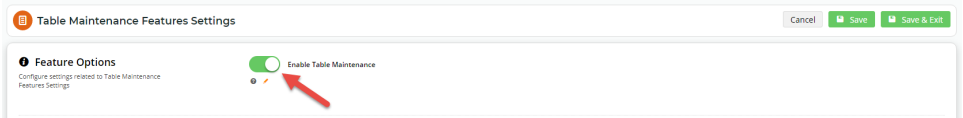
Table Maintenance settings are configured by Administrators.

1. Enable Table Maintenance

- 1. In the CMS, navigate to **Settings Feature Management Advanced**.
- 2. Toggle **ON Table Maintenance** to enable it in the CMS. (If you have any tables set up already, they will now be visible in the CMS navigational menu.)
- 3. Click **Configure**.



- 4. In the **Table Maintenance Features Settings** screen, toggle **ON Enable Table Maintenance** to switch on Table Maintenance on your site and enable **Table Maintenance** settings.



- 5. To save this setting, click **Save** or **Save & Exit**. **Table Maintenance** is now enabled in the CMS and on your website.

2. Create and configure a table

**NOTES** - Table Maintenance must be enabled (Step 1). Available tables from the ERP have been flagged for editing only by Commerce Vision. They cannot be created or deleted.

This step allows you to add or edit a table, configure its location on the CMS navigation bar, and set record access and editing functions. When a table is added, the system creates a searchable List page for all its records. The User can select an available record to view or edit it. Depending on settings, they can also create new records and edit existing ones. As a simple example, we will create two price books using two custom tables, one for B2B customers and the other, B2C ones.

Whether you're adding or editing a table, you will be taken to the **Custom Table Header** page. Here, you can:

- (i) select the custom table
- (ii) make the table active (or not) in the CMS,
- (ii) place the table somewhere on the CMS navigation menu,
- (iii) enter the page title for the table when it displays in the Search list and records pages,
- (iv) what fields Users can search by when looking up records,
- (v) the range of functions available for each field for record maintenance.

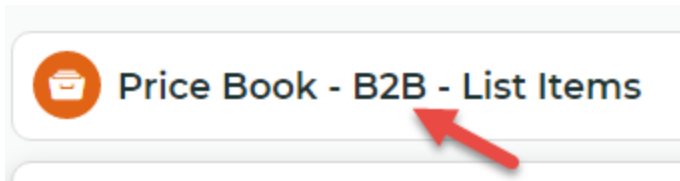
To create a custom table:

- 1. In the **Tables** panel of the **Table Maintenance Features Settings** screen, any custom tables already set up are listed and can be edited or deleted. Each line represents an added table.

To edit a table, click its **Edit** button. Since we are adding a new table, click **Add Table**.

With pre-existing tables	With no pre-existing tables
--------------------------	-----------------------------



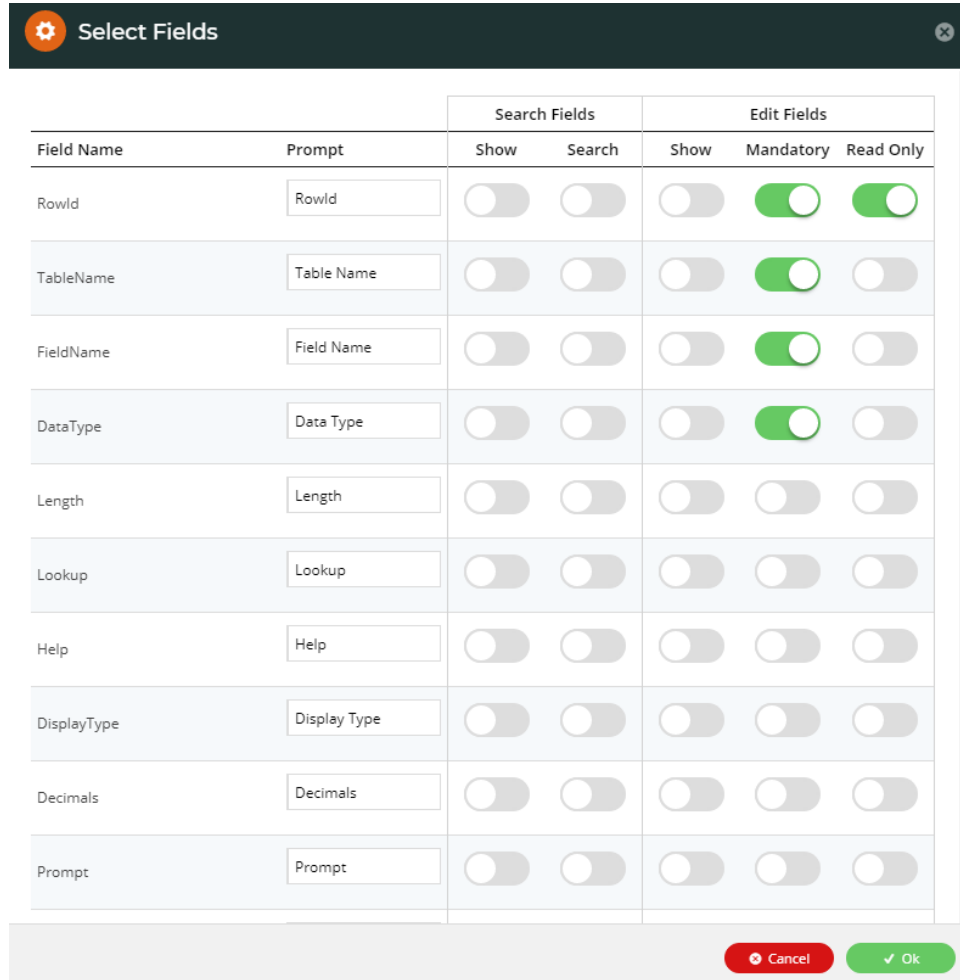


7. Click **Save**.
8. Configure fields for the **Search** and **Edit** record pages. In **Table Maintenance Tables**, click **Edit** for a table. (Or just continue after step 7 if creating a new table)
9. In **Search and Edit Fields**, any existing configurations for the fields will be displayed. (If no fields have been configured, the panel is blank.)

Fields configured	No fields configured																																													
<div><div><b>Search and Edit Fields</b> Fields displayed on the search and edit pages</div><div><div>Configure Search &amp; Edit Fields</div><div><div>Search Fields</div><table><thead><tr><th>Field Name</th><th>Prompt</th><th>Searchable</th><th></th></tr></thead><tbody><tr><td>RowId</td><td>Product Code</td><td>✓</td><td>Delete</td></tr><tr><td>TableName</td><td>Product</td><td>✓</td><td>Delete</td></tr><tr><td>FieldName</td><td>Description</td><td>✓</td><td>Delete</td></tr><tr><td>DataType</td><td>Variant</td><td>✓</td><td>Delete</td></tr></tbody></table><div>Edit Fields</div><table><thead><tr><th>Field Name</th><th>Prompt</th><th>Mandatory</th><th>Read Only</th><th></th></tr></thead><tbody><tr><td>RowId</td><td>Product Code</td><td>✓</td><td>✓</td><td>Delete</td></tr><tr><td>TableName</td><td>Product</td><td>✓</td><td></td><td>Delete</td></tr><tr><td>FieldName</td><td>Description</td><td>✓</td><td></td><td>Delete</td></tr><tr><td>DataType</td><td>Variant</td><td>✓</td><td></td><td>Delete</td></tr></tbody></table></div></div></div>	Field Name	Prompt	Searchable		RowId	Product Code	✓	Delete	TableName	Product	✓	Delete	FieldName	Description	✓	Delete	DataType	Variant	✓	Delete	Field Name	Prompt	Mandatory	Read Only		RowId	Product Code	✓	✓	Delete	TableName	Product	✓		Delete	FieldName	Description	✓		Delete	DataType	Variant	✓		Delete	<div><div><b>Search and Edit Fields</b> Fields displayed on the search and edit pages</div></div>
Field Name	Prompt	Searchable																																												
RowId	Product Code	✓	Delete																																											
TableName	Product	✓	Delete																																											
FieldName	Description	✓	Delete																																											
DataType	Variant	✓	Delete																																											
Field Name	Prompt	Mandatory	Read Only																																											
RowId	Product Code	✓	✓	Delete																																										
TableName	Product	✓		Delete																																										
FieldName	Description	✓		Delete																																										
DataType	Variant	✓		Delete																																										

10. Click the **Configure Search & Edit Fields** button.
11. To edit the fields, click the **Configure Search & Edit Fields** button. The **Select Fields** window, displaying all fields, now appears. You can do the following:
  - a. change the field name (Prompt) displayed to users (by editing each Prompt) **NOTE** - Field Names in the first column cannot be changed.
  - b. select which fields will be viewable and searchable on the Search List (by toggling ON/OFF each setting)

- c. select which fields will be viewable, can be edited (or Read Only), and must not be blank (Mandatory) (by toggling ON/OFF each setting).



The 'Select Fields' dialog box contains a table with the following fields and settings:

Field Name	Prompt	Search Fields		Edit Fields		
		Show	Search	Show	Mandatory	Read Only
RowId	RowId	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
TableName	Table Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FieldName	Field Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
DataType	Data Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Length	Length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lookup	Lookup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help	Help	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DisplayType	Display Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decimals	Decimals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prompt	Prompt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right of the dialog are 'Cancel' and 'Ok' buttons.

12. To save your settings, click **OK**.

13. When you have finished configuring the table, click **Save** or **Save & Exit** to save any changes.

Once your tables have been set up as you want them, its records can be accessed via the CMS navigation menu.

## Allow a CMS User access to Table Maintenance

Administrators can specify which CMS Users can access to Table Maintenance. This is based on Role settings.

- Table Maintenance Management - can view and edit record
- Table Maintenance Viewer - can view records only

Refer to the [CMS User guide](#) for help in setting a Role for a CMS User,

## Additional Information

Minimum Version Requirements	4.31
Prerequisites	
Self Configurable	Yes after initial consultation

Business Function	Content
BPD Only?	Yes
B2B/B2C/Both	Both
Ballpark Hours From CV (if opting for CV to complete self config component)	Contact Commerce Vision
Ballpark Hours From CV (in addition to any self config required)	Contact Commerce Vision
Third Party Costs	n/a
CMS Category	--

## Related help

- [Custom Fields](#)
- [Customisation Resources](#)
- [Add Custom Fields To Products and Categories](#)