

Custom Table Maintenance



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

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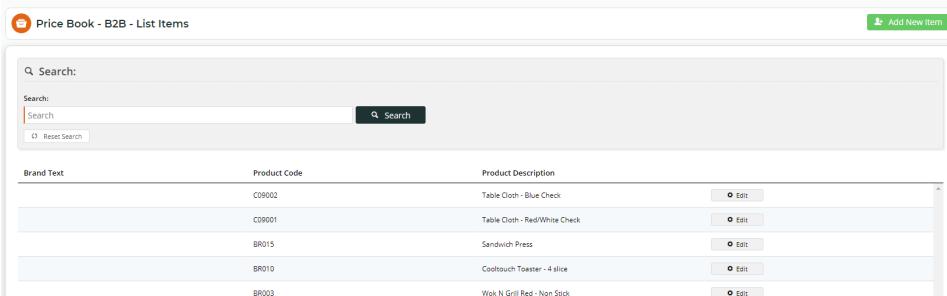
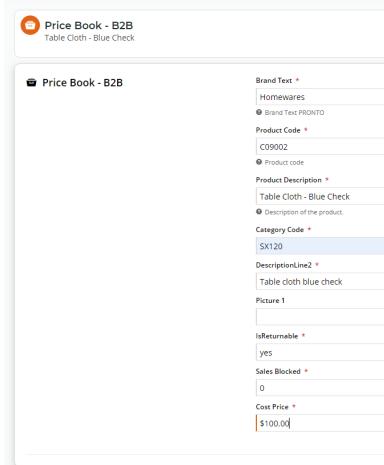
Overview

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	Record page
This is an example of the Search List page. When the custom table was set up, permission to add records was enabled. 	This example is a record from our price book has set them to editable. * indicates mandatory fields. 

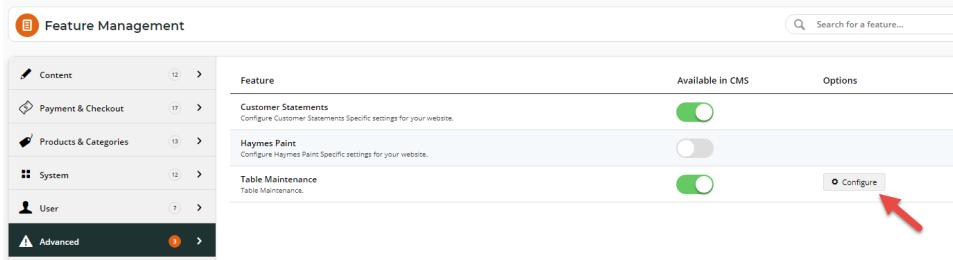
Configure Table Maintenance Settings

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,
- (iii) place the table somewhere on the CMS navigation menu,
- (iv) enter the page title for the table when it displays in the Search list and records pages,
- (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

The screenshot shows the 'Table Maintenance Tables' page. At the top, there's a header with a 'Tables' icon and the text 'Configure the tables used for table maintenance'. Below the header, there's a table with columns: 'Page Title', 'Sequence', 'Menu Item', and 'Options'. One row is visible: 'Price Book - B2B' in 'Page Title', '2' in 'Sequence', 'Content > Price Book > Price Book 2' in 'Menu Item', and 'Edit' and 'Delete' buttons in 'Options'. A red arrow points to the green 'Add Table' button at the top right of the table area.

2. The first step is to select a table. Scroll down to the bottom of the page and select a table from **Table available for maintenance**. Here will select the 'Product Table'.

The screenshot shows a dropdown menu titled 'Table available for maintenance'. It contains a single option: 'Product Table (Product)'. The 'Product Table (Product)' option is highlighted with a red border.

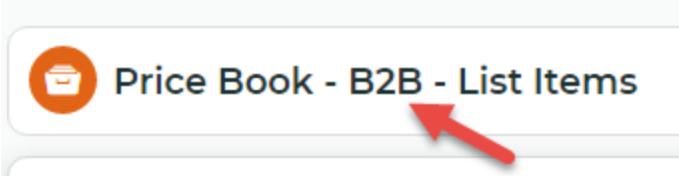
3. Toggle **Is Active** ON or OFF. When active, the table's page is included in the CMS navigation bar, and its Search and Edit pages are visible. If inactive, the table page cannot be accessed in the CMS.
4. Configure the location of access to the table on the CMS navigation menu. It can be placed anywhere under any existing parent menu.

The screenshot shows the CMS navigation menu configuration. On the left, there's a sidebar with 'CONTENT' and 'SETTINGS' sections. Under 'CONTENT', there are several menu items: 'Content', 'Advanced Content', 'Navigation', 'File Manager', 'Style Guides', and 'Price Book'. The 'Price Book' item is highlighted with a red border. On the right, there's a 'Tables' configuration page. A red arrow points from the 'CONTENT' section in the sidebar to the 'Content' menu item in the 'Tables' page. Another red arrow points from the 'Content' menu item to the 'menu group' label. A third red arrow points from the 'Price Book' menu item to the 'menu parent item' label. A fourth red arrow points from the 'Price Book' menu item to the 'menu labels' label. A fifth red arrow points from the 'Price Book B2C' and 'Price Book B2B' items to the 'menu labels' label.

- a. In **Sequence**, add a number. This is the order of the table as an item on the parent menu when there are more than one menu items.
- b. In **Page Icon**, select an icon to display next to the menu item name.
- c. In **Menu Group**, select the CMS parent menu under which this table will be grouped.
- d. In **Menu Parent Item**, enter the name of parent menu item.
- e. In **Menu Label**, enter the name of table as menu item.
5. Add the page title name for the table. In **Page Title**, enter the heading name that will appear for the List Items and Records pages.

The screenshot shows the 'Price Book - List Items' page configuration. At the top, there's a header with a 'List Items' icon and the text 'Price Book - List Items'. Below the header, there's a search bar with a magnifying glass icon and the placeholder 'Search:'. Underneath the search bar, there's a 'Search:' label and a 'Search' button. A red arrow points to the 'Page Title' field, which contains 'Price Book - List Items'.

6. In **Page Title Suffix**, enter the description that is appended to the page title in the record details page. Default: the placeholder: {Description}. This retrieves the existing description of the table.



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																																													
<p>Search and Edit Fields Fields displayed on the search and edit pages</p> <p>Configure Search & Edit Fields</p> <p>Search Fields</p> <table border="1"> <thead> <tr> <th>Field Name</th> <th>Prompt</th> <th>Searchable</th> <th></th> </tr> </thead> <tbody> <tr> <td>RovId</td> <td>Product Code</td> <td>✓</td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>TableName</td> <td>Product</td> <td>✓</td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>FieldName</td> <td>Description</td> <td>✓</td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>DataType</td> <td>Variant</td> <td>✓</td> <td><input type="radio"/> Delete</td> </tr> </tbody> </table> <p>Edit Fields</p> <table border="1"> <thead> <tr> <th>Field Name</th> <th>Prompt</th> <th>Mandatory</th> <th>Read Only</th> <th></th> </tr> </thead> <tbody> <tr> <td>RovId</td> <td>Product Code</td> <td>✓</td> <td>✓</td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>TableName</td> <td>Product</td> <td>✓</td> <td></td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>FieldName</td> <td>Description</td> <td>✓</td> <td></td> <td><input type="radio"/> Delete</td> </tr> <tr> <td>DataType</td> <td>Variant</td> <td>✓</td> <td></td> <td><input type="radio"/> Delete</td> </tr> </tbody> </table>	Field Name	Prompt	Searchable		RovId	Product Code	✓	<input type="radio"/> Delete	TableName	Product	✓	<input type="radio"/> Delete	FieldName	Description	✓	<input type="radio"/> Delete	DataType	Variant	✓	<input type="radio"/> Delete	Field Name	Prompt	Mandatory	Read Only		RovId	Product Code	✓	✓	<input type="radio"/> Delete	TableName	Product	✓		<input type="radio"/> Delete	FieldName	Description	✓		<input type="radio"/> Delete	DataType	Variant	✓		<input type="radio"/> Delete	<p>Search and Edit Fields Fields displayed on the search and edit pages</p>
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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 screenshot shows a 'Select Fields' dialog box with a header 'Select Fields'. The main area is a table with two sections: 'Search Fields' and 'Edit Fields'. The 'Search Fields' section contains columns for 'Field Name' and 'Prompt', with input fields for 'RowId', 'TableName', 'FieldName', 'DataType', 'Length', 'Lookup', 'Help', 'DisplayType', 'Decimals', and 'Prompt'. The 'Edit Fields' section contains columns for 'Show', 'Search', 'Show', 'Mandatory', and 'Read Only'. For most fields, the 'Mandatory' and 'Read Only' checkboxes are checked (green). The 'Length' and 'DisplayType' rows have their 'Mandatory' checkboxes unchecked (grey). The 'Ok' button at the bottom right is highlighted.

Search Fields		Edit Fields				
Field Name	Prompt	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"/>

Cancel Ok

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](#)