Building Fields with Select Controls

Time: 0:10

Fields can not only accept your user's input, but also help them understand their choices and help you get clean data from your user. Learn how to create new fields and move them around in your configurator. Then see how the Select controls offer a list of options for your user. Explore different select controls to find the best one for the user experience and data validation.

Objectives

Time: 0:36

- Creating and Managing Fields
- Creating a Select List
- Styling a Select List

Creating and Managing Fields

Time: 0:42

In prior courses we modified a field that already existed in the configurator. But how do we create a new one? You can create a new field, or any other element in the configurator UI, by duplicating an existing element or starting from scratch. Duplicating an existing element is a great idea if you want multiple elements to look and behave the same. When you duplicate an element, you copy everything about it, from its data type and control to its help. The only thing that changes is the name. Here we've created a field for the product's height. Let's duplicate it and create two new fields for width and depth. To copy an element, first select it in the explorer. It will be highlighted, and you'll see two icons appear in the highlighting. Click the context menu icon, represented by three dots. The context menu shows you things you can do with an existing element. In the context menu, choose duplicate. You'll see a new duplicate element appear in the explorer. Because no two items can have the same name, the name of the duplicate has been changed for you, by adding a number at the end. In our example, let's modify the new field. Change the name to F-width Change the label to Width Here, we will remove the old field help image. Repeat those steps to create a third Depth field. Select the field to be duplicated. Choose "duplicate" from the context menu. Edit the new duplicate. You can use the context menu to delete an element from the UI, as well as perform other operations. To re-order elements in the UI, first select the element and then drag it up or down in the explorer.   For example, we can reorder our 3 fields within the group. Note that the preview pane on the right helps you confirm your design.

Creating a Select List

Time: 3:10

We saw how to create a field element by duplicating an existing one. Now, let's create a new element from scratch. We need to find out what material the cube should be made from. It could be wood, glass, steel… we will identify this with a new "Material" field. To create a new field element in the UI, first select where you want it to appear by clicking a location somewhere under the UI node in the explorer. In our example, we want the new field to appear on the About page. So, drill down to and click on p-About in the explorer. Second, now that you've selected where you want your new element, choose which element you want. Click the plus sign in the

explorer context menu to create a new element. Since we're on a page, there are many elements we can create. If you had selected a different starting point, this list could change or may even collapse into just one item. In our example, choose Field under the list of elements. A new field appears with a generic name. Give the field a name of fMaterial, and a label of Cube Material. We want to store words in this field, not numbers, so Text is the best datatype here. The control list shows that available ways to capture text information. We could use a textbox for your user to complete, but then we'd rely on everyone spelling the materials correctly. And they won't know what options are available. When you have a clear list of options you want your user to choose from, use a Select control. In our example, choose the control called Select. You'll see the field in the preview becomes a clickable list of choices. Scroll down to the select options expander. Scroll down until you see the list of options, with the big Add Row button at the top of the list. Since this is a new field, there are no options. Let's add some. Click the Add Row button a few times and enter the values Glass, Steel, and Wood. Notice that the options you've added to the table appear in the preview to the right. Click the field to see them as your user would. Like many other UI elements in the configurator, each choice you offer your user can have a value and a label. The value is stored, the label is shown. Why have these two? Many times, your company may use internal codes that don't make sense to your users. For example, maybe your company uses WOD-1 for the wood material, and other codes for the other materials. Place the data you want to store as the value, and the way it should appear to your user as the label. You can even add a description or an image for the various choices. The more you add to your options, the easier it is for your user to understand them. Just remember that the label, description, and image are not stored when the user makes a selection. Only the value is stored. This gives you flexibility to change the marketing text, or offer the same choices in other languages, while still using one consistent code for each option. In our example, we'll use UPPERCASE WORDS as the values, and Proper Case text as the labels.

Styling a Select List

Time: 7:02

Select lists present your user with options to choose from. Because your users can only select from the options you define, select lists make data entry easy for your user, and the data accurate for you. You understand the basics, so here are some more details about creating and styling select lists. Select lists don't have to capture text. They can also capture numbers, or other data types. For example, consider a level of detail field, where your user can specify how precisely they want their cube sized. Accurate to the inch? Quarter inch? Eighth? This can be captured in a number field with a Select control. The numeric choices are presented with text labels that are easier to understand. Select lists can also appear to your user in different ways. The classic drop-down list of values is the default, and it's the most common. You can offer many choices in a very small space. If the list has more than 10 choices, your user can either scroll to find an entry, or just start typing it. You've seen how images can help make a select list easier to understand. You can change the size of the image to make it larger. If the image is most important, change the control from select to image select. The data stays the same, but now the image is more visible. Image selects can show the labels or hide them for a purely graphical interface. If you have a small list of options and want to be sure your user is aware of them all, change the control from select to radio. A radio control is just like a select control, only all choices are always displayed. It takes up more space but can make decisions clearer for your end user. In our example, we'll set the fMaterial field's control to select.

Recap

Time 9:50

Fields can not only accept your user's input, but also help them understand their choices and help you get clean data from your user. You've learned how to create new fields and move them around in your configurator. You saw how fields based on the Select controls offer a list of options for your user to select from. You also explored different select controls to find the best one for each field's needs.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

EPICOR

Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298