Applying a Custom Segment to Record Types

WARNING

This feature is not currently enabled in your account. To enable this feature, please contact your administrator.

For a custom segment to be available on records, you must apply the segment to one or more record types or transaction sublists. After you do, the segment is available as a field on instances of that records. Depending on where you apply the segment, it is available either as a body field or as a column in a transaction sublist. Authorized users can use the segment to classify the record or transaction line. On standard forms, the segment is displayed on the Custom subtab of the record instance.

You can also apply segments to groups of record types, in some cases, or make them columns in transaction sublists, or groups of transaction sublists. For example, you can apply a segment to all sales transactions or to all sales item sublists. You can also apply a segment to another segment.

You apply segments to record types when creating or editing a segment by using the Application & Sourcing subtab.

The options available in the Application field group of the Transactions and Transaction Columns subtabs enable you to specify the transactions and transaction columns where the custom segment is available.

For more information about the transactions where custom segments can be used, see Transaction Types Supported by Custom Segments.

Note: Custom segments cannot be applied to custom lists.

To apply a segment to a record type, transaction sublist, or group:

1. Edit the custom segment.
2. Click the **Application & Sourcing** subtab.

   The subtabs available from the Application & Sourcing subtab include the following.

   - Transactions, including the following items:
     - Custom transaction types
     - To apply the custom segment to Collect Tegata and Pay Tegata transactions, check the Tegata box
     - To apply the custom segment to single vendor payments and bill payments to multiple vendors, check the Vendor Payment box.
   - Transaction columns, and custom transaction sublists

     You can configure the kit or assembly custom segment column field to copy values from sales order items to fulfillment items. For more information, see Apply to Kit or Assembly Components Setting for Custom Segments and Transaction Line Custom Fields.
   - Entities
   - CRM
   - Items
   - Other Record Types, including the following items:

        - Advanced revenue recognition records
        - Allocation Schedule destination line – Applies the custom segment to the destination lines on an allocation schedule
        - Allocation Schedule source line – Applies the custom segment to the source lines on an allocation schedule

          For more information about allocation schedules, see Expense Allocation Overview.
        - Budget Import – If a custom segment is applied to a budget record, and budget transactions exist, the custom segment cannot be inactivated, deleted, or removed from the budget record.

          > **Important:** To avoid data corruption, the Custom Segments feature cannot be disabled if a custom segment is applied to a budget record.
        - Multi-book accounting records

      > **Note:** Some records are not available unless the feature is enabled. For example, the accounting book record is not available if the Multi-Book Accounting feature is not enabled.
    - Custom Record Types, which includes any custom record types available in the account
    - Custom Segments, which includes all custom segments available in the account

   If the **Use as Field ID** box is checked for the custom segment, no field ID fields or columns are shown on the Application & Sourcing subtabs because one ID is used for all fields.
3. Specify where the custom segment is available by checking the appropriate boxes on each of the subtabs.
    - Some of the subtabs have an Application field group, where you specify the transactions where this custom segment is available.
    - All of the subtabs include a list of record types, where you specify the record types where the custom segment is available.
4. Click **Save**.

Related Topics