Customizing ITA

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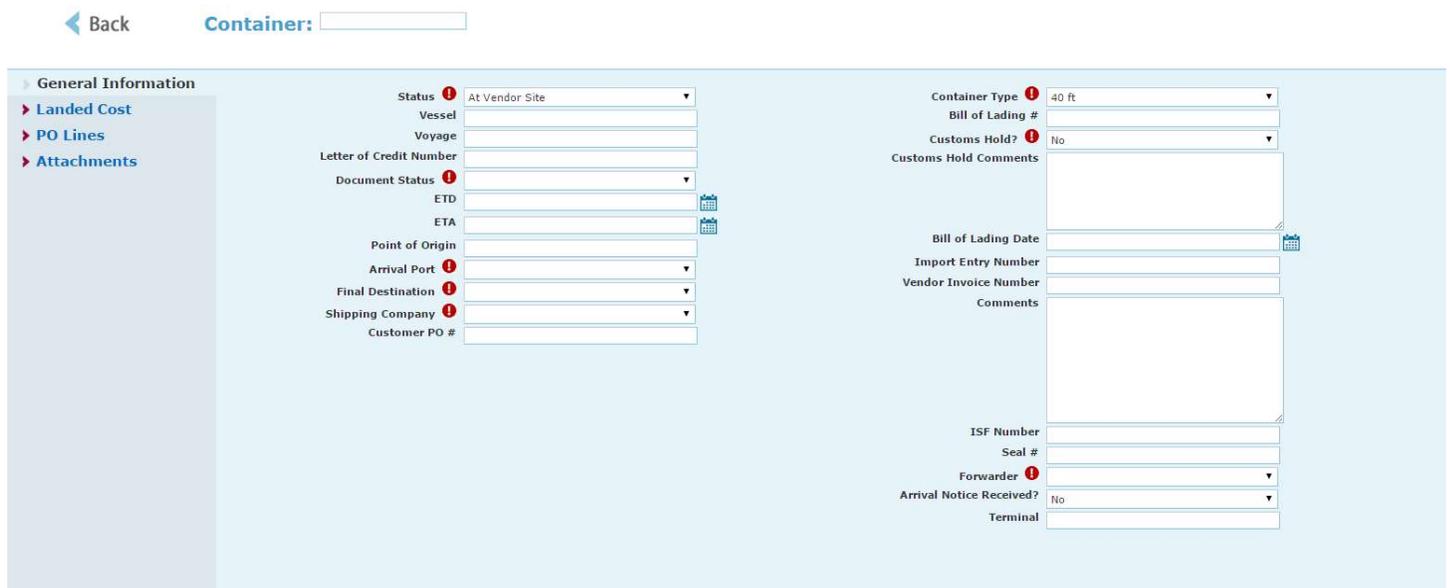
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Summary

I would like to give you a few helpful hints when customizing ITA to fit your everyday needs. I will discuss how to remove and add fields, how to add tabs, and what each field type means and does.

Getting Started

When you are getting started with ITA, you will see the default tabs and fields. As seen below, some of these fields may not be related to you or you may use different terminology. ITA is fully customizable and you can change the fields to match the way that you do business.

Image (1.0)

From the main screen, you want to click on the gear and select the Customize option. Keep in mind to change the name of a current field or tab, the field or tab must be clear of any current data. I highly suggest spending some time customizing your app before you start entering data. Here, you can also add or remove columns that are displayed on your main screen, change your logo, disconnect your app from Quickbooks, and contact support. I will go into more details on those features later.

Image (1.1)

Once you select Customize, a new window will appear showing you all of the current fields for the first tab. In this example we are starting with the General Information Tab. If you would like to switch tabs that you are customizing simply choose the tab from the drop down and all of your tab Options will appear. Here you will see both the General Information Tab and the Landing Cost Tab.

Choose which Tab to add/edit fields: General Information ▼
General Information
Landed Cost

Add Tab   **Add Field**

	Heading	Label	Control Type	Default Value	
☐	General Information ▼	Status	ListBox ▼	**Edit List Values**	X
☐	General Information ▼	Vessel	ShortText ▼		X
☐	General Information ▼	Voyage	ShortText ▼		X
☐	General Information ▼	Letter of Credit Number	ShortText ▼		X
☐	General Information ▼	Document Status	ListBox ▼	**Edit List Values**	X
☐	General Information ▼	ETD	ShortText ▼		X
☐	General Information ▼	ETA	ShortText ▼		X
☐	General Information ▼	Point of Origin	ShortText ▼		X

Image 1.2

In order to remove a current field, simply click on the red x on the left hand side of the screen. See above image (image 1.2)

To add fields to your current tab, click Add Field and a blank line will appear at the bottom of all of your current fields (image 1.3). Name the Field and select the type of content that will be displayed here. If you decide that you would prefer that this field appear in a different tab, but you've already added it, simply select the drop down and select the correct tab that you would like the field to appear under. (Image 1.4)
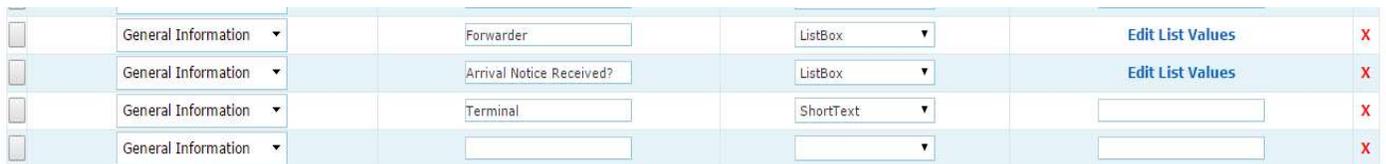
	Heading	Label	Control Type	Default Value	
☐	General Information ▼	Forwarder	ListBox ▼	**Edit List Values**	X
☐	General Information ▼	Arrival Notice Received?	ListBox ▼	**Edit List Values**	X
☐	General Information ▼	Terminal	ShortText ▼		X
☐	General Information ▼		▼		X

Image 1.3

	Heading	Label	Control Type	Default Value	
☐	General Information ▼	Seal #	ShortText ▼		X
☐	General Information ▼	Forwarder	ListBox ▼	**Edit List Values**	X
☐	General Information ▼	Arrival Notice Received?	ListBox ▼	**Edit List Values**	X
☐	General Information / Landed Cost	Terminal	ShortText ▼		X
☐	General Information ▼		▼		X

Image 1.4

Control Type

Control Type will dictate what type of content is displayed in each field. There are several Options for the content you would like your field to display. In this section, I will break down how to use and edit each type of field option available.

Date- When you select Date as your control type for a field, it will prompt that field to generate a calendar for you to select from when editing that field. (Image 1.5)
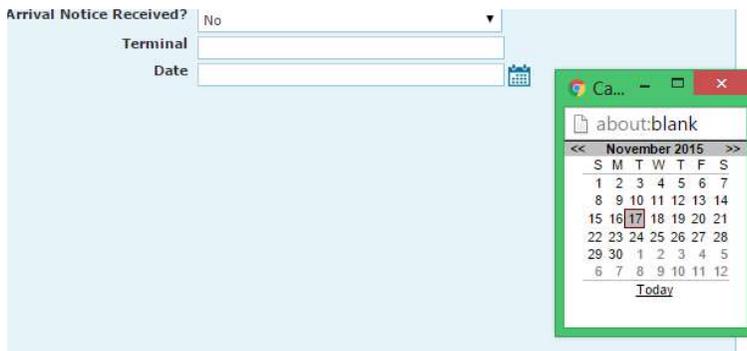

Image 1.5

Email- The Email control type allows you to add an email address associated with the information you are adding. It will also allow you to email from within the app.

List Box-A list box allows you to create your own drop down options. This control type is great to use for the city that you receive and send your shipments to. When you select ListBox as your control type "Edit List Values" will appear under default value. Click here to edit the content that appears in the drop down. For this example, I will be using the Status Drop down Values. Once you select "Edit List Values", a pop up will appear. Here you can change the current name of a value or add more values to the drop down. Simply click Add List option and a blank row will appear at the bottom of the list (Image 1.7). To delete a Value, simply click the red x on the far left hand side of the screen.

Image 1.6

Image 1.7

Long Text- The long text control type allows you up to 4000 characters with no restriction to what type of characters are here. If you cannot see all the text in your long text field, you can expand it by dragging and dropping the bottom right hand corner of the field (Image 1.8).

Image 1.8

Number- The Number control type will only accept number values and is limited to 75 characters.

Number (not equal to zero) - This control type has the same restrictions as The Number control type above, but does not allow for a quantity of zero.

Short Text- Short text control type allows you to include any type of character, but is restricted to 75 characters and displays as a single line of information. (Image 1.9)
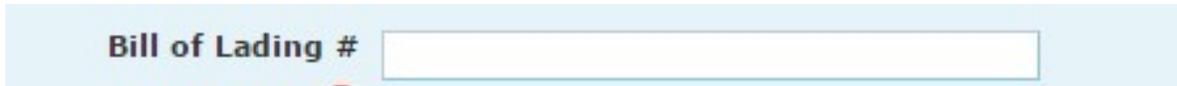
Image 1.9

ZIP- The zip control type allows for a maximum of 15 characters and is generally used for Address Zip codes that may require a hyphen.

Adding Tabs

To add a tab you will select the gear icon, select Customize. Once on the customization screen you will type in the name of the Tab you would like to add and click add tab.(Image 1.10). Once you select add tab your new tab will appear in your Tab selection drop down (Image 1.11). Your new tab will now be available to add fields to. Keep in mind as long as there are no fields in your new tab, the tab will not appear in your app.

Image 1.10

Image 1.11

Deleting a Tab

To delete a tab from your app, all information in that tab will need to be removed. Once that is done, the fields can be deleted. Once the Tab no longer has any fields, it will not show up on your app. It will still be an option in your customization drop down if you decide at any point to add the tab back to your app.