Auto-Create, File & Email OE Invoice

Description

The Extender module "Demo OEAutoFileEmailInvoices" includes a script to add a button to PRINT and a button to EMAIL the PDF invoice file in a Note in Order Entry.

The module includes a configuration table to setup where the PDF files are saved. The sample is designed to use configuration that can be displayed in Orchid Document Management Link.

Install Extender and Information Manager Notes

Sage 300 Order Entry, Orchid Information Manager Notes and Extender must be installed and configured.
If you want to view the generated documents in the Orchid tray in OE, you also need to configure Document Management Link.

Install Extender while all users are logged out of Sage 300.

Activate and restart Sage 300

Setup Extender

Prerequisites

Order Entry needs to be activated and configured.
The emailing function will only email if the A/R Customer delivery method is set to "Email" or "Contact's email".
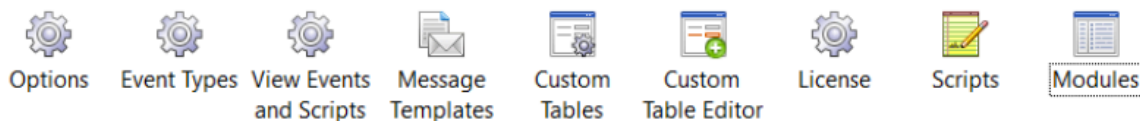
Import the Extender module.

- Extender Modules / Import
- From the Sage Desktop, navigate to Extender / Setup / Modules
- Select Import
- browse to where the Demo - OE Autofile and Email Invoices v2.1.vi has been saved.
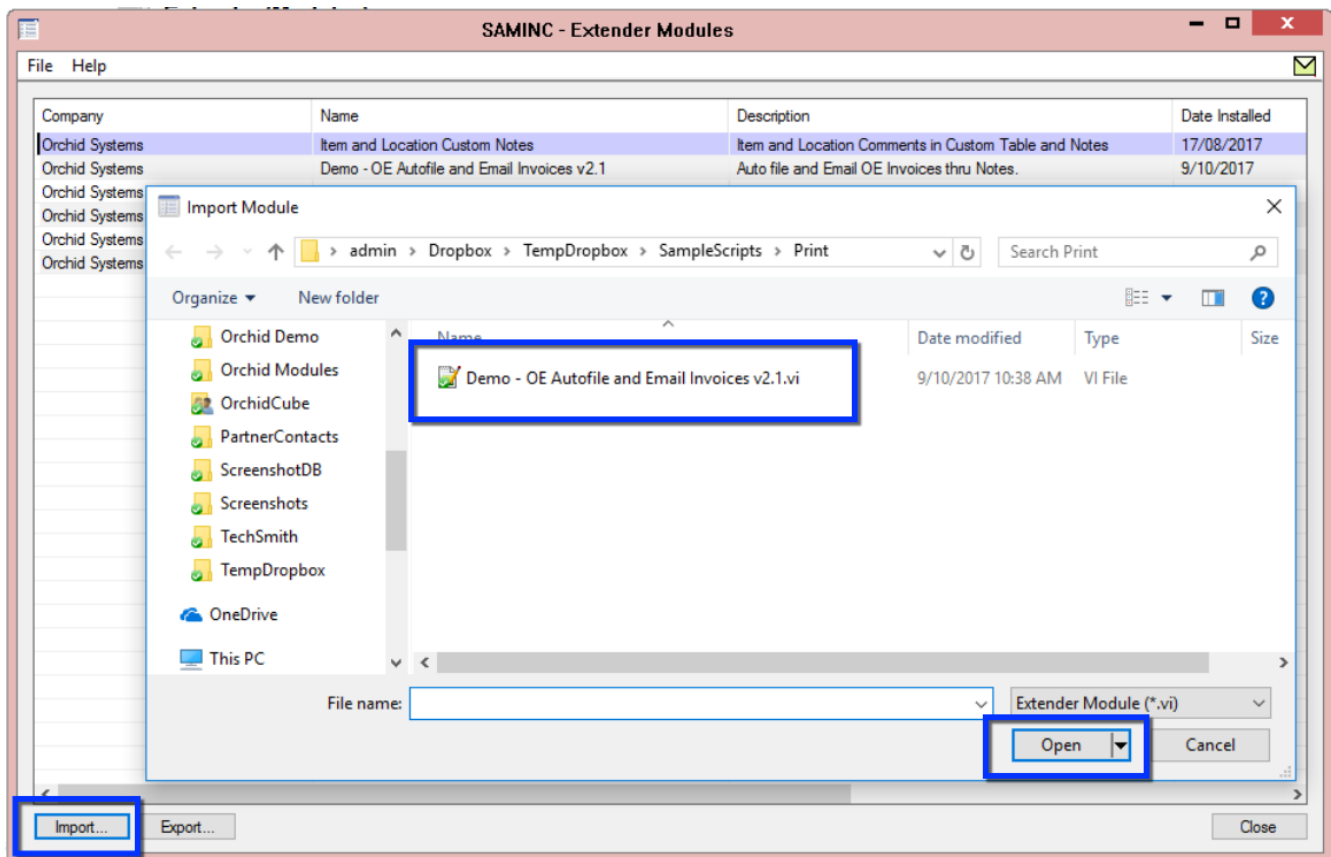
Extender (Modules)

Licensed to: , Orchid Business Systems
Dealer:
CC:

Options   Event Types   View Events and Scripts   Message Templates   Custom Tables   Custom Table Editor   License   Scripts   Modules

Click Open.

This will create the custom table, import scripts and link them to the relevant Sage 300 views and insert the Information Manager Notes Hotkey setup records,
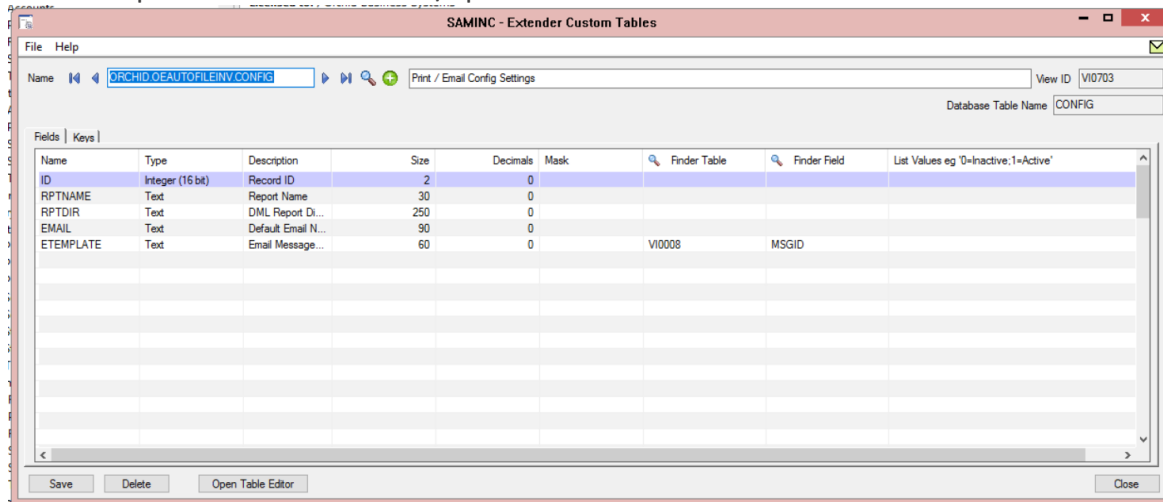
Restart the Sage Desktop when prompted for Extender Scripts to take effect.

Check the module was imported successfully

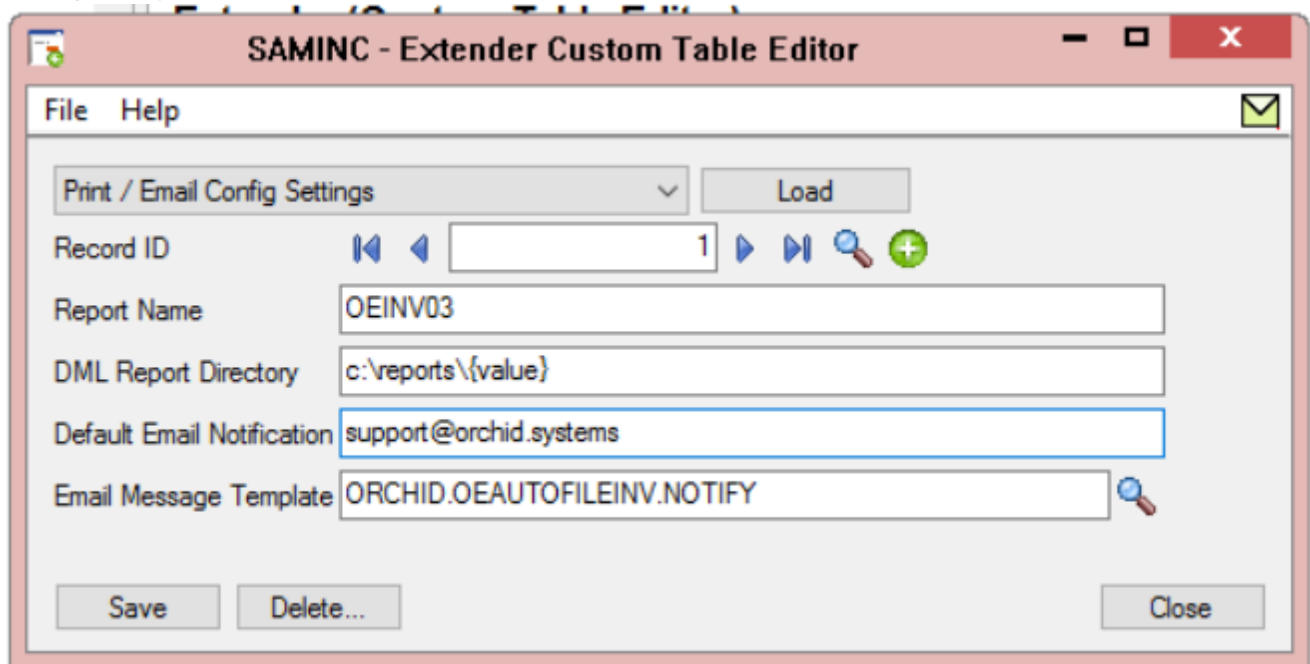*Custom Table   - OEAUTOFILEINV.CONFIG*

Used to store the print and email configuration settings.

Use the Open table Editor to add/update records.

Or choose Extender Setup > Custom Table Editor > Print/Email Config Settings and add the config record.

Config Setup

Enter 1 for the Record ID

Choose the Report (Invoice layout) to use.

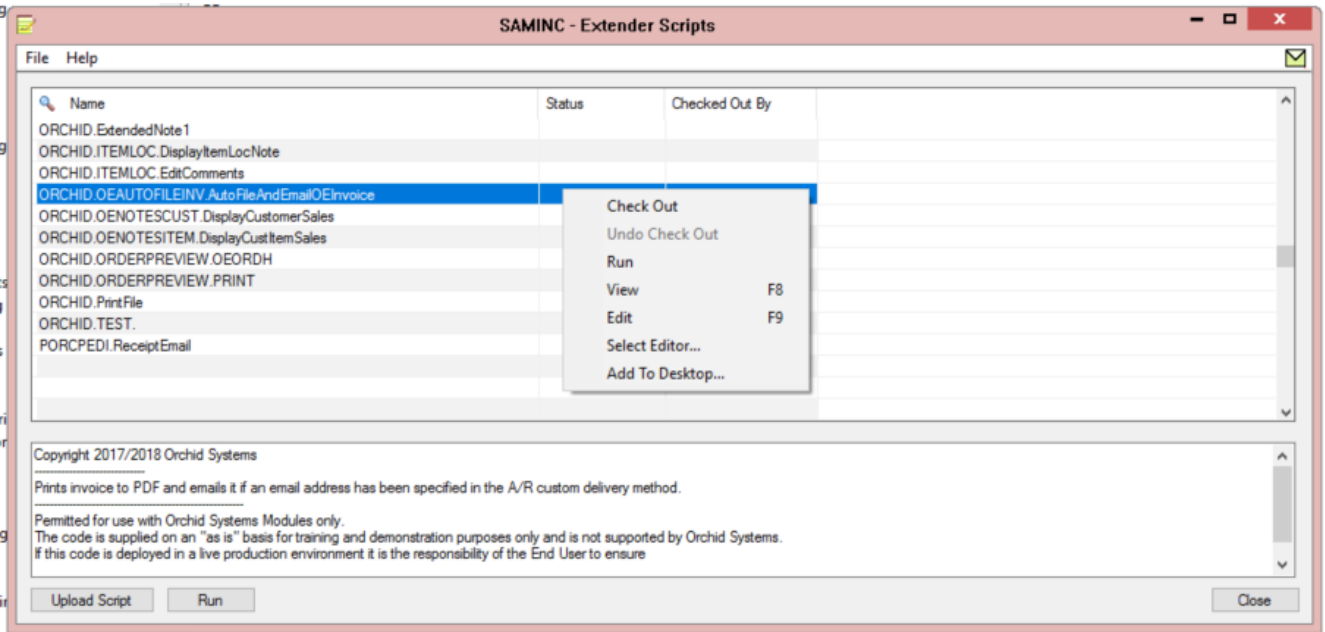*Note that the Extender Print report function currently only works with a non data piped invoice report.*

DML Report Directory: Choose the path where the PDF reports will be saved. This should match the Network folder setup in Document Management Link if you want to see the documents in DML. When choosing {value} in the report path, the script will replace {value} with the Customer number and create a folder per customer.

Navigate to Extender / Setup / Scripts
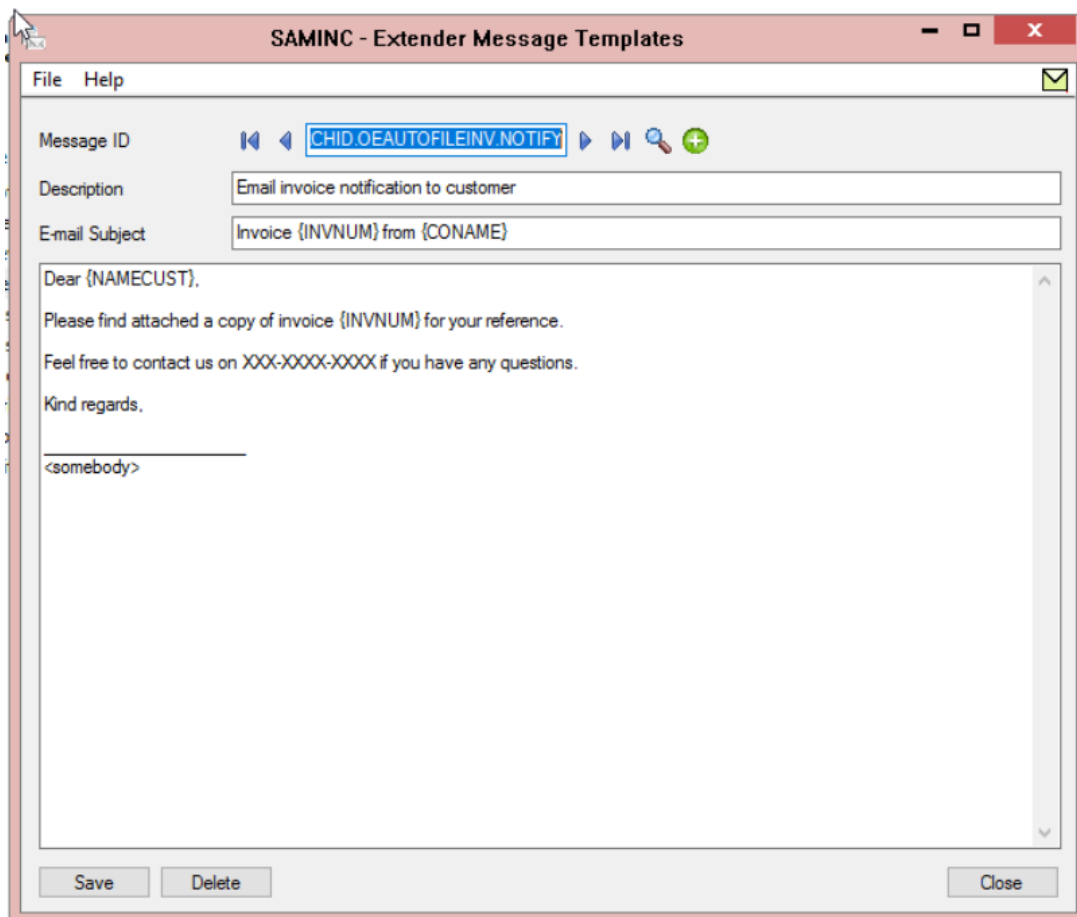
The module includes 1 script.

To modify the script, right click on it and choose Check Out. This will open the script in your Text Editor.

ORCHID.OEAUTOFILEINV.AutoFileAndEmailOEInvoice	Designed to be run in Information Manager Setup > Options > Notes/DML Hotkey Setup to display a Print and Email button to print the last invoice for an OE order.

Amend the email message template if required

Fields inside the {} brackets are replaced with the appropriate values in the script. If you need to include additional variables, you can add them to the template and amend the script accordingly using the REPLACE function.

Configure Information Manager Notes

Refer to Orchid notes training guide for detailed setup.
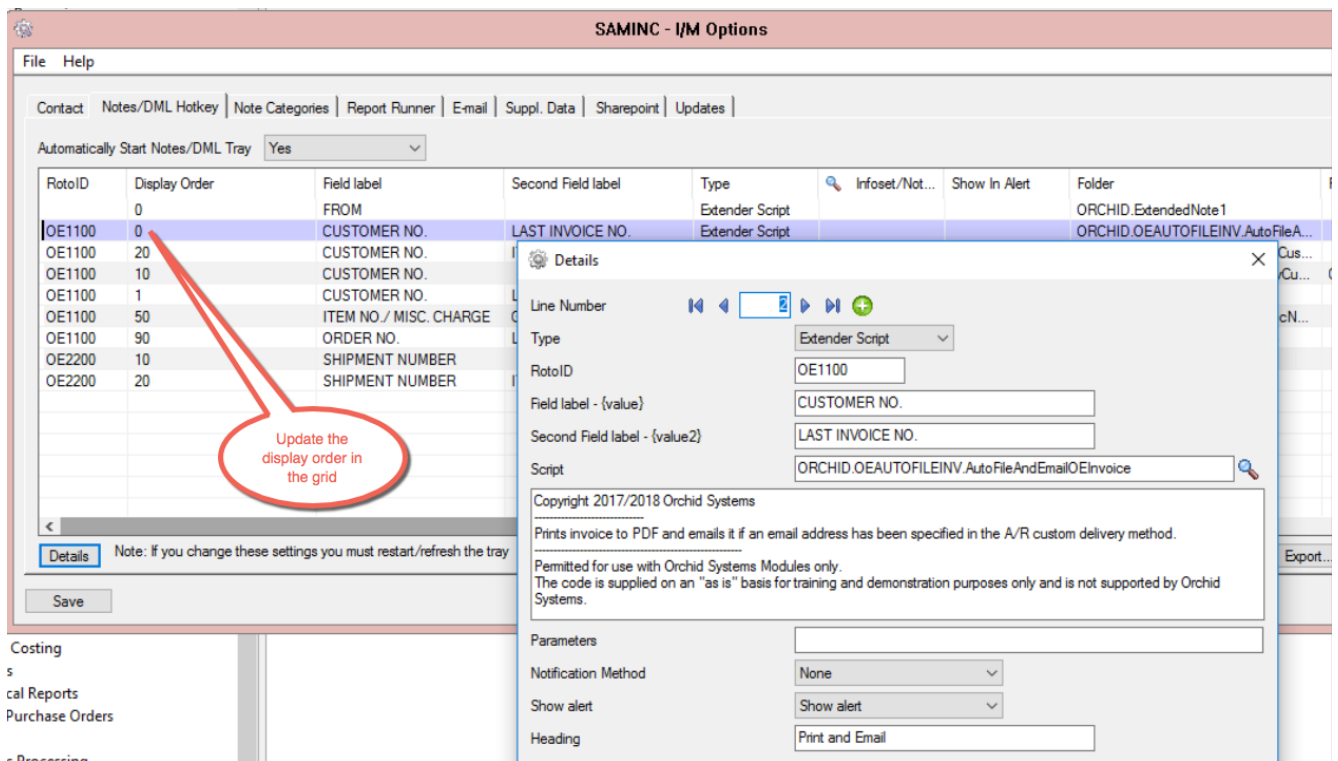
- I/M Options > Note Categories

Note categories determines the background color of the Note.

Create a category - the example uses the following:

Note Category	Where it is used
PRINTINV	Note with Extender script buttons to Print and Email

- I/M Options > Notes/DML Hotkey Setup

You can amend the heading as required.

Insert a row for the Customer Note:
Choose "Extender Script" as the Note Type.
Field Label: CUSTOMER NO.
Second field label: LAST INVOICE NO.

Enter OE1100 as the RotoID: this will ensure the note is displayed only on the O/E Order Entry screen.

If you want to use a different category, modify the script

Save the I/M Options
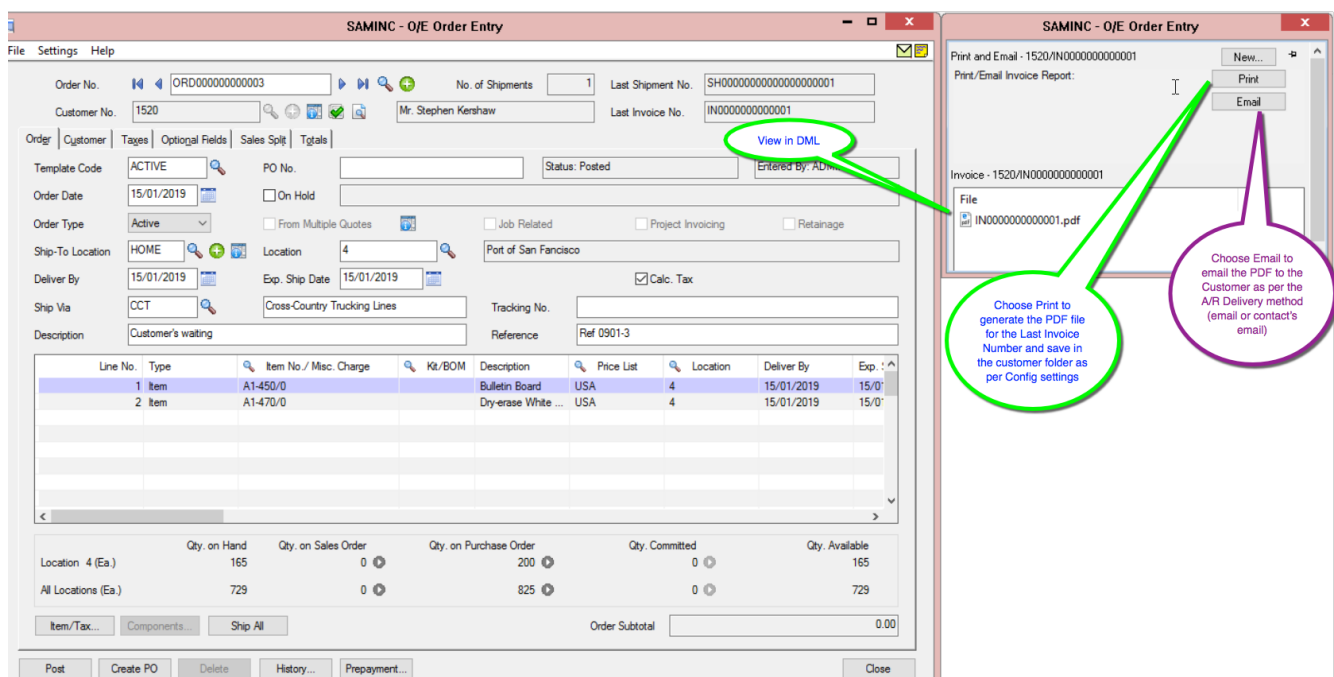Refresh the Info Manager Tray or Restart the Sage Desktop.

Viewing / Entering an OE Order –

Using the script

In Order Entry, view an order that has been invoiced. (Last Invoice No. should show on the screen). Click the Print Button to generate a PDF of the invoice, based on the configuration settings in the Custom table.

In the sample script / sample data, the file is renamed INV0000n.pdf, is saved in a customer folder and uses INV03.rpt from Order Entry.

Choose email to email the generated PDF to the A/R Customer delivery method (if set to Email or Contact's email).

Comments on the script

1. The script displays a message after generated the file if the PDF is created successfully. To give the script sufficient time to save the file, there is a Sleep command in the script. If you don't need to display a message after printing report, you can comment out the sleep function and the showMessage function.

2. If the customer's delivery method is set to "Mail", the default email address on the config file will be sent the email.