

O/E Order default values and data validation - Template and Order Type

BUSINESS REQUIREMENT

A company wants to configure O/E so that some users can only enter O/E Quotes.

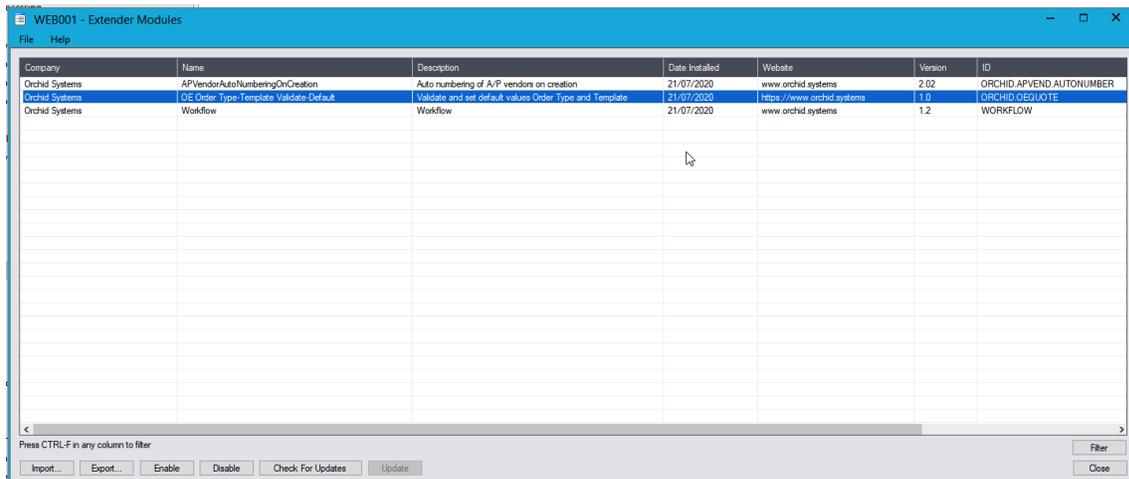
KEY LEARNINGS

Module includes a View script attached to Order Header View OE0520
Use a module for ease of deployment.

EXTENDER SETUP KEY STEPS

Install the latest product update for Extender.

In Extender Setup > Modules, import the downloaded file.



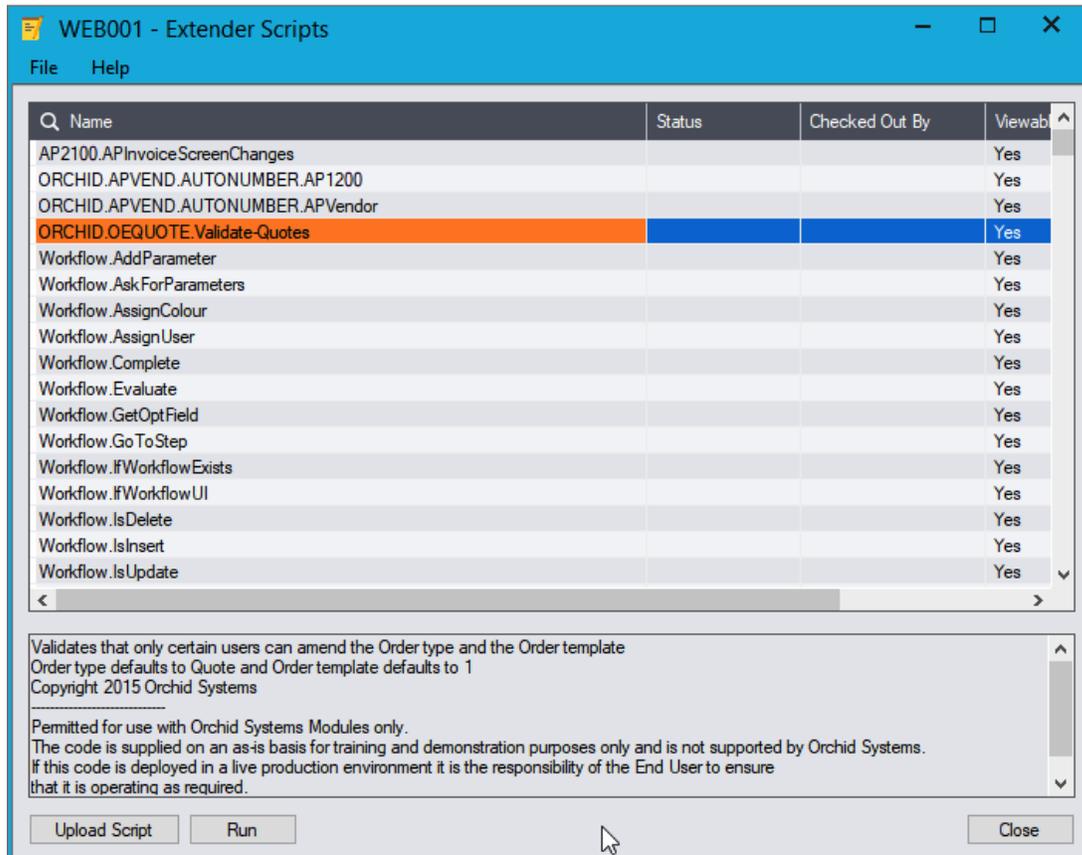
The screenshot shows a window titled "WEB001 - Extender Modules" with a menu bar containing "File" and "Help". Below the menu bar is a table with the following columns: Company, Name, Description, Date Installed, Website, Version, and ID. The table contains three rows of data:

Company	Name	Description	Date Installed	Website	Version	ID
Orchid Systems	APVendorAutoNumberingOnCreation	Auto numbering of A/P vendors on creation	21/07/2020	www.orchid.systems	2.02	ORCHID.APVEND.AUTONUMBER
Orchid Systems	OE Order Type Template Validate Default	Validate and set default values Order Type and Template	21/07/2020	https://www.orchid.systems	1.0	ORCHID.OEQUOTE
Orchid Systems	Workflow	Workflow	21/07/2020	www.orchid.systems	1.2	WORKFLOW

At the bottom of the window, there is a status bar with the text "Press CTRL-F in any column to filter" and a set of buttons: "Import...", "Export...", "Enable", "Disable", "Check For Updates", "Update", "Filter", and "Close".

Restart the Sage desktop.

YOU CAN VIEW THE SCRIPT IN EXTENDER SETUP > SCRIPTS



VARIATIONS

- Use a parameter list configured in View Events, Scripts and Workflow for the list of valid users and the default quote.
- Use custom tables to link users and default templates
- Default OE Order template based on customer's attribute
- Use Sage security profiles.

TESTING

Create two O/E Templates, ACTIVE for Active Orders, 1 for Quotes.

Login to Sage 300 as a user who is not ADMIN.

In the OE Order screen, enter a customer number: The template defaults to 1 and the Order type field = Quote and is not editable.

Requirement!

This functionality requires Extender Developer.