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.
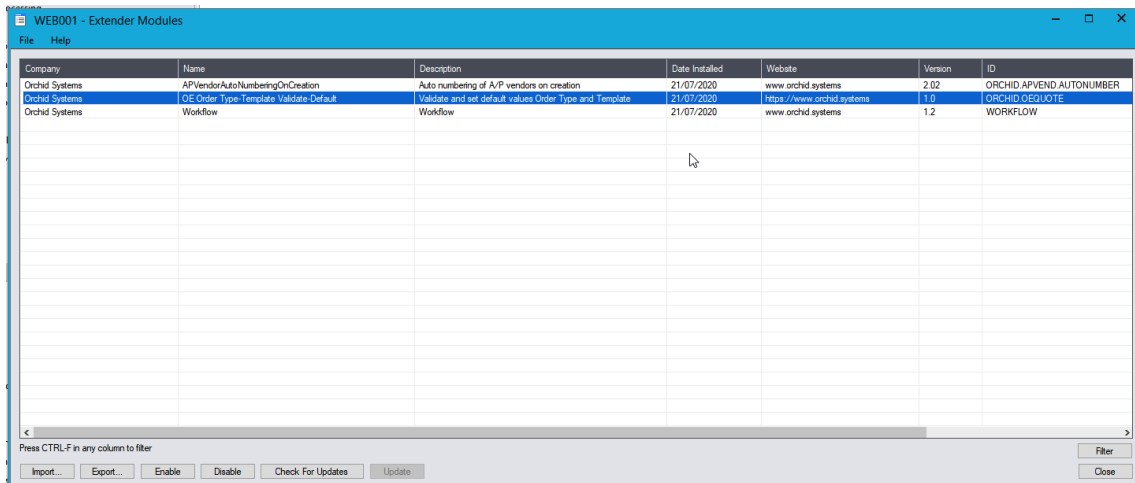
KEY LEARNINGS

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.

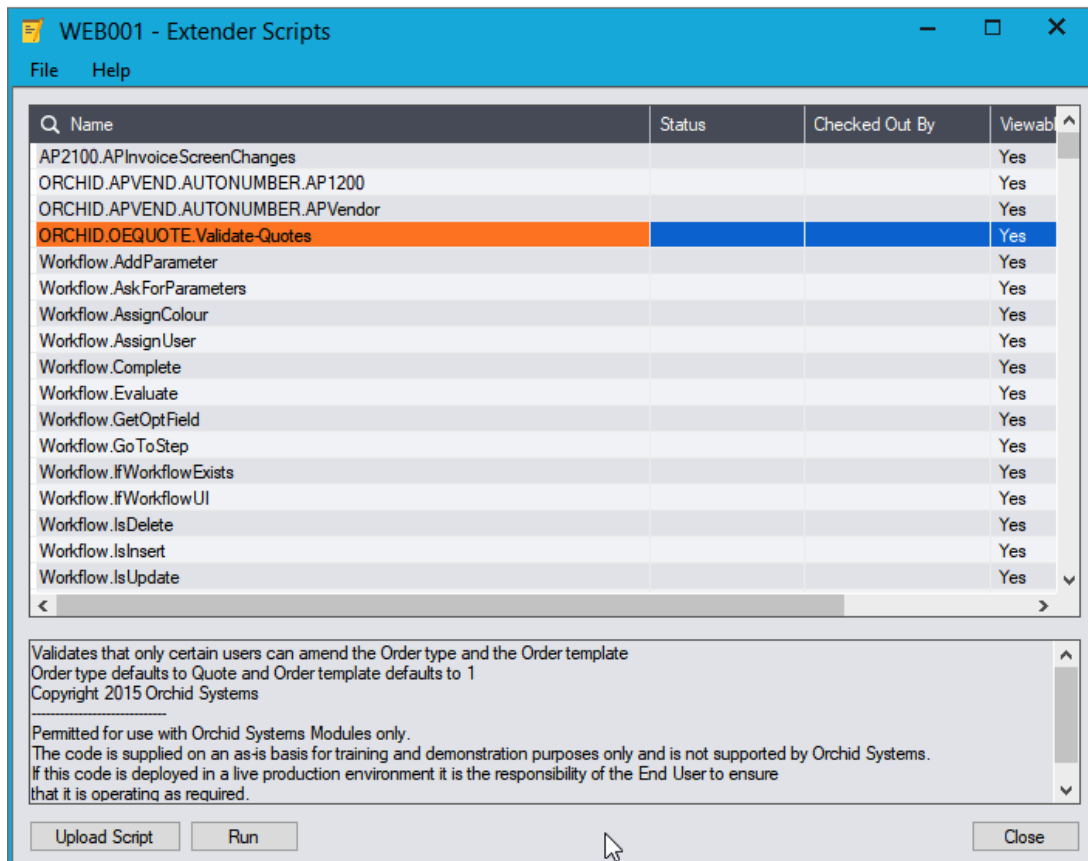In Extender Setup > Modules, import the downloaded file.

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.