

Extender module to default A/R Invoice detail optional fields based on custom A/R Item optional fields

Description

The Extender module “Demo Autopopulate AR Item Opt Fields.vi” includes a custom Extender table to store optional fields per A/R Items and a script to default the optional field values on A/R Invoice detail lines.

It also includes a custom screen (python Extender script) to maintain the A/R Item optional fields.

Install Extender

Sage 300 Accounts Receivable and Extender with a Developer Edition must be installed and configured.

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

Activate and restart Sage 300

Setup Extender

Prerequisites

Create the required optional fields in Sage 300 Common Services and attach them to A/R Invoice detail lines.

Import the Extender module.

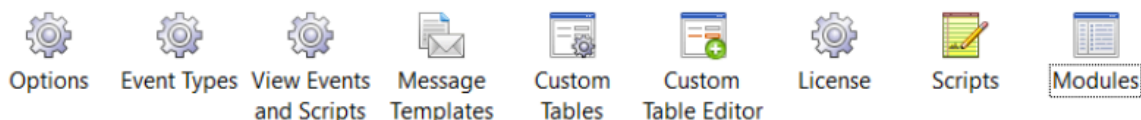
- Extender Modules / Import
- From the Sage Desktop, navigate to Extender / Setup / Modules
- Select Import
- browse to where the Demo Autopopulate AR Item Opt Fields.vi has been saved.

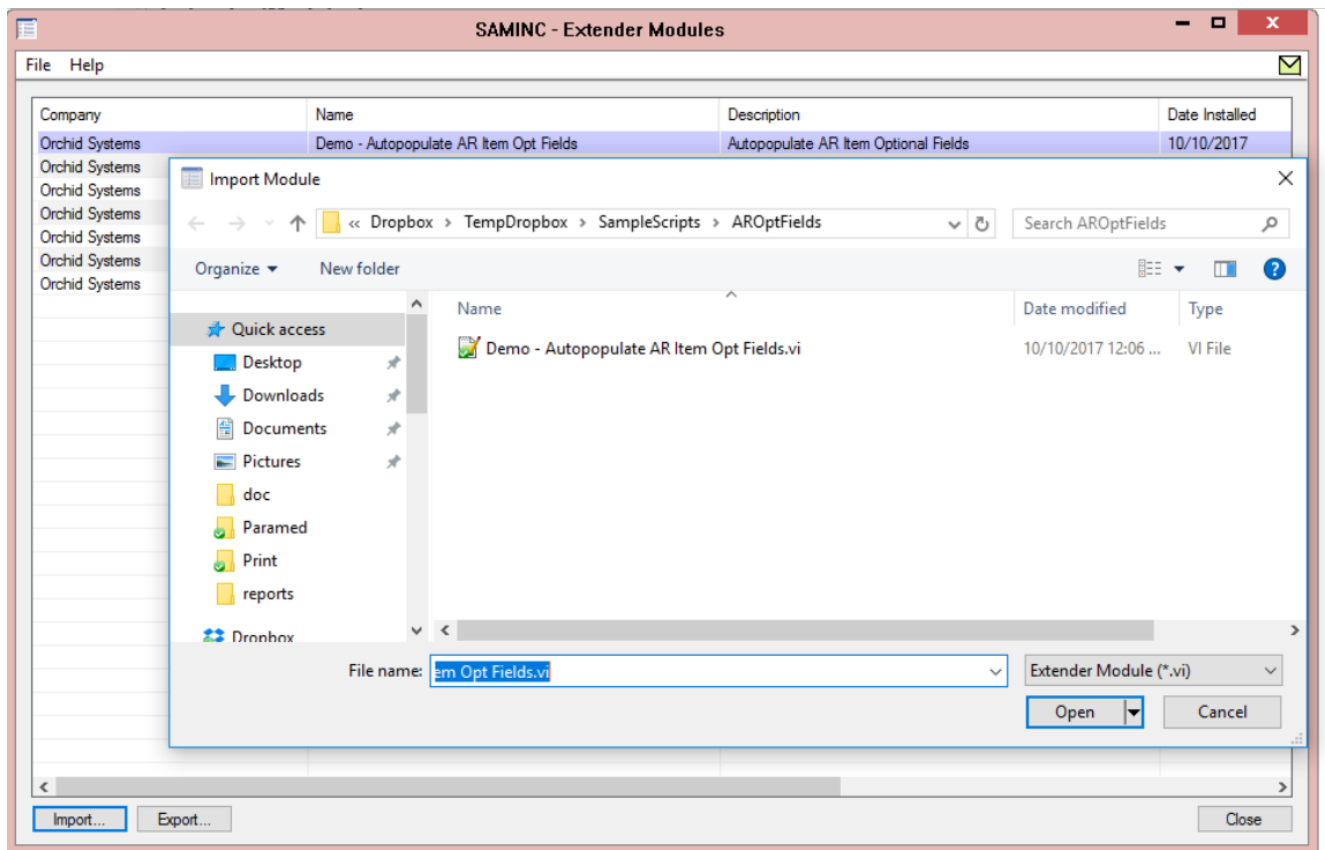
Extender (Modules)

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Click Open.

This will create the custom table, import scripts and link them to the relevant Sage 300 views.

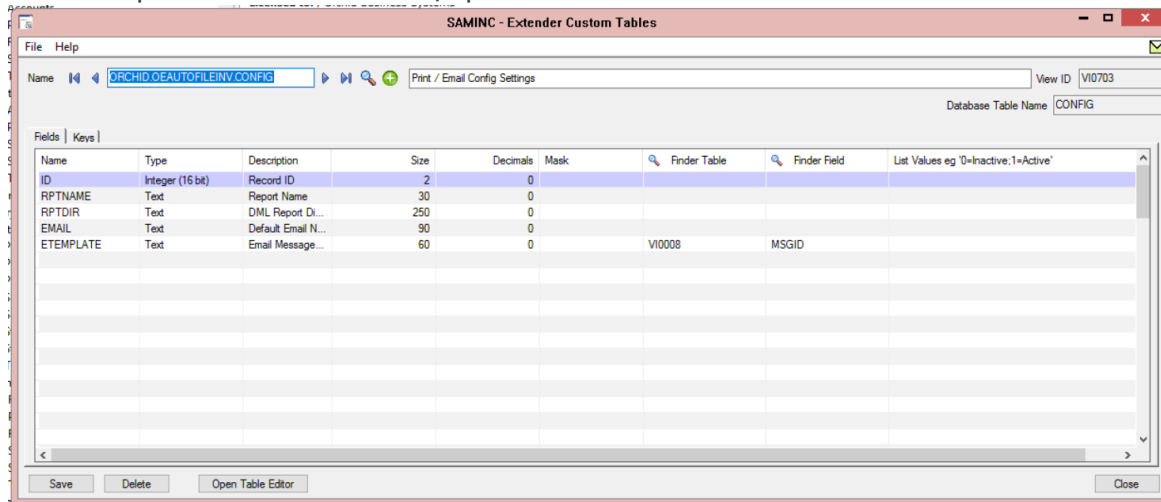
Restart the Sage Desktop when prompted for Extender Scripts to take effect.

Check the module was imported successfully

Custom Table - OEAUTOFILEINV.CONFIG

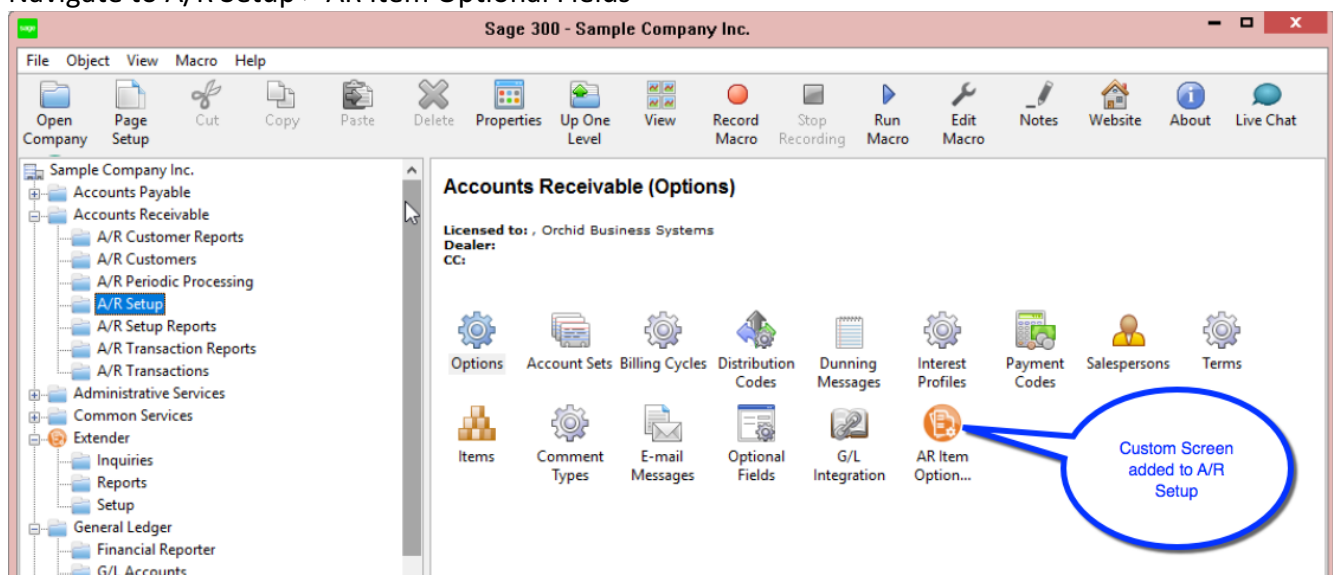
Used to store the print and email configuration settings.

Use the Open table Editor to add/update records.

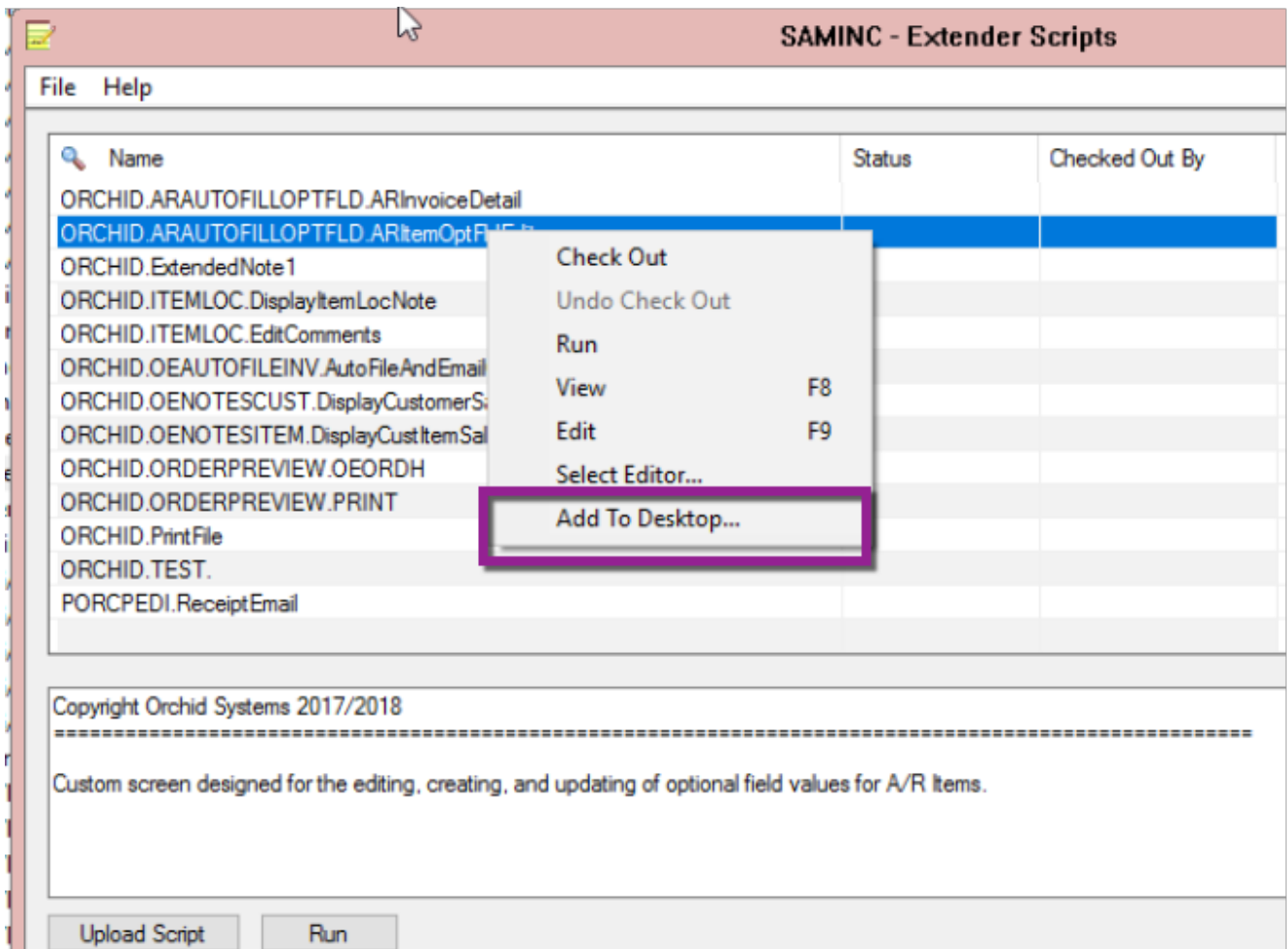


Config Setup

Navigate to A/R Setup > AR Item Optional Fields



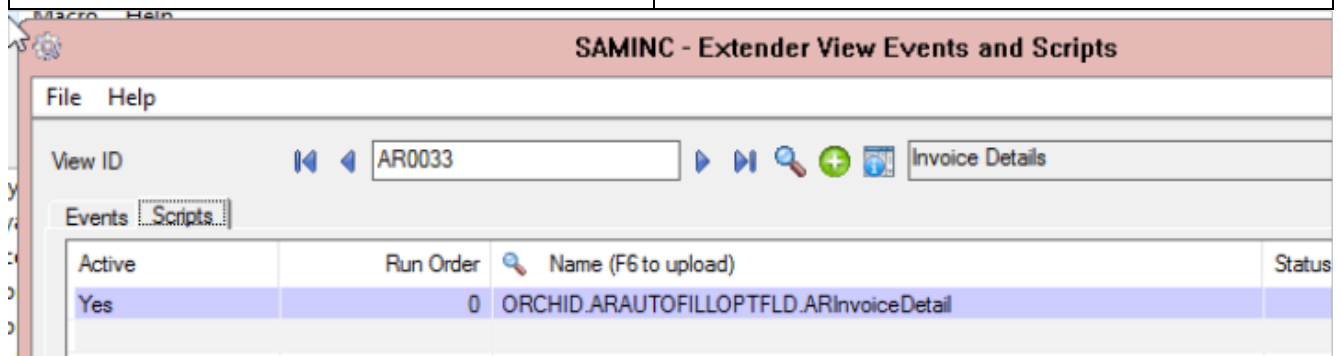
Note: If you want to add the custom screen to another Sage 300 menu, navigate to Extender Setup > Scripts > Right click on the ORCHID.ARAUTOFILLOPTFLD.ARItemOptFldEdit script and choose "Add to desktop".



Navigate to Extender / Setup / Scripts

The module includes 2 scripts.

ORCHID.ARAUTOFILLOPTFLD.ARItemOptFldEdit	Designed to maintain the A/R Item optional fields (link existing Sage 300 optional fields to selected A/R Items).
ORCHID.ARAUTOFILLOPTFLD.ARInvoiceDetail	Script attached to A/R Invoice Details view (AR0033) to default the optional fields from the A/R Item to the invoice detail line.



Using the script

Enter Optional fields for selected items

Navigate to A/R Setup > A/R Item Optional Field Setup (or wherever you have added the custom screen).

SAMINC - A/R Item Optional Field Maintenance

File Help

AR Item Code: BK-360 Swivel Mounting Bracket

Optional Field: COLOR Item's Color

Optional Field Value: Purple

Add Delete... Close

Create a new A/R Invoice, type Item

The optional field on the invoice line defaults to Purple for item BK-360 and to Blue for item CA-59 as per the A/R Item optional field maintenance.

SAMINC - A/R Invoice Entry

File Settings Help

Batch Number: 38 AR Item invoice batch

Batch Date: 09/10/2017 No. of Entries: 0 Total Amount: 0.000

Document Taxes Terms Optional Fields Sales Split Totals

Entry Number: 1 Item: Color defaulting Entered By: ADMIN

Customer Number: 1200 Mr. Ronald Black Invoice Printed: No

Ship-To Location: Account Set: TRADE

Document Type: Invoice

Document Number: ***NEW***

PO Number:

Order Number:

Shipment Number:

Optional Field	Optional Field Description	Value Set	Value	Value Description
BACKORDER	Backorder	Yes		
COLOR	Item's Color	Yes	Purple	Purple
COSTCENTRE	Cost Centre	Yes		

Special Instructions

Close

Lin...	Item N...	UOM	Description	Optional Fields	Quantity	Unit Price	Extended Amt.	Extended Cost	Dist. Code	Print Comment	Disc
1	BK-360	EA	Swivel Mounting Bracket	Yes	1.00000	117.000000	117.00	55.50	ITEM	No	Yes
2	CA-59	FT	RG 59 Cable	Yes	1.00000	0.940000	0.94	0.41	ITEM	No	Yes

Optional Fields

Optional Field	Optional Field Description	Value Set	Value	Value Description
BACKORDER	Backorder	Yes		
COLOR	Item's Color	Yes	Blue	Blue
COSTCENTRE	Cost Centre	Yes		
COUNTRY	Country	Yes	AU	Australia
EXTWARRANTY	Extended Warranty Available	Yes	No	
QUANTITY	Quantity	Yes	0	
SALESREP	Sales Rep	Yes		
SIZE	Item Size	Yes		
SQUAREFT	Square Footage	Yes		

Account/Tax...

Add Delete Close

Comments on the script

- 1 As the custom table has 2 key fields (AR Item and Optional field), we recommend to use a custom screen to maintain the data. The ARItemOptFldEdit script includes example use of functions to display the description when an A/R Item is selected in the finder as well as an example of filtering the Optional field list to only Optional fields linked to A/R Invoice detail.
- 2 The ARInvoiceDetail script defaults the value when entering A/R Invoice lines. Users can overwrite the values if required.