

# Extender to display Sales History in Orchid I/M Notes

## Description

The Extender module “Orchid Note – Customer Sales” includes a script to display the Sales history for the customer in a Note in Order Entry.

The Extender module “Orchid Note – Customer and Item Sales” includes a script to display the Sales history for the customer /Item in a Note in Order Entry.

Both modules include a script to generate the content of the note and a row in I/M Setup > Options > Notes/DML Hotkey Setup.

## Install Extender and Information Manager Notes

Sage 300 Order Entry, Orchid Information Manager Notes and Extender must be installed and configured.

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

Activate and restart Sage 300

## Setup Extender

### Prerequisites

N/A

Import the Extender module.

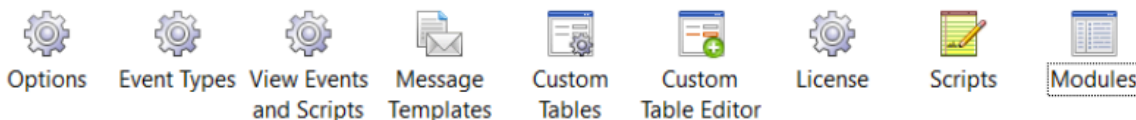
- Extender Modules / Import
- From the Sage Desktop, navigate to Extender / Setup / Modules
- Select Import
- browse to where the Orchid Note - Customer Sales.vi has been saved.

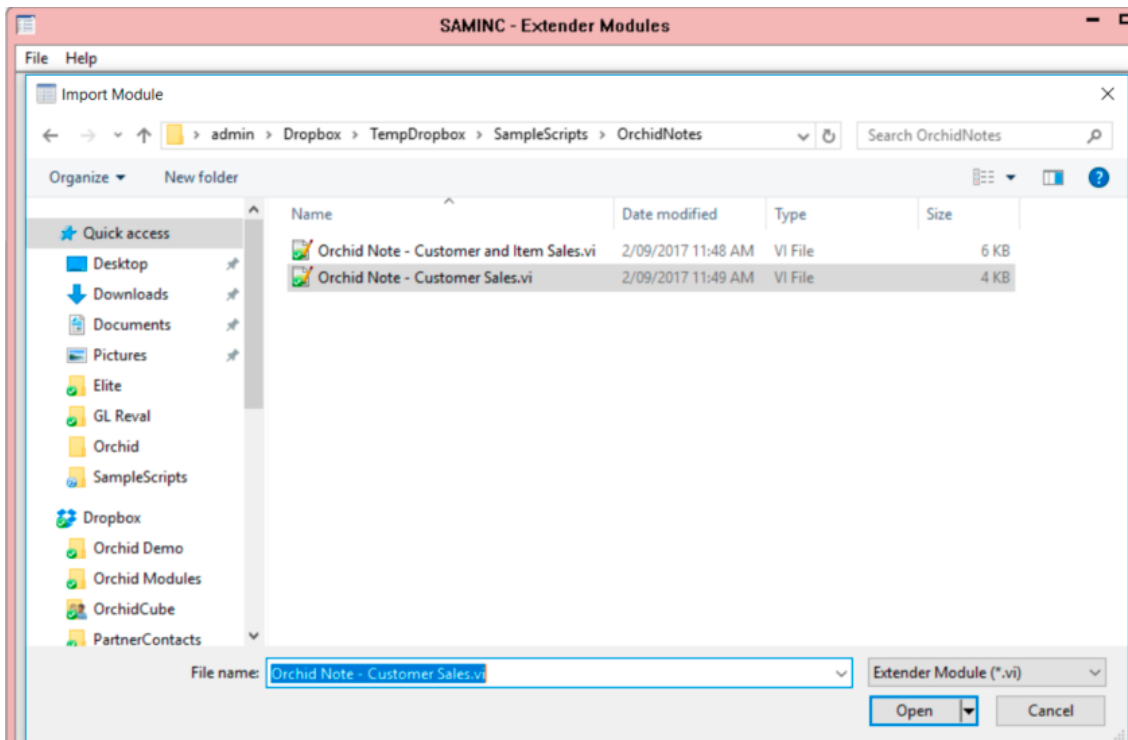
### Extender (Modules)

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Click Open.

This will create the Information Manager Notes Hotkey setup records, import scripts and link them to the relevant Sage 300 views.

Follow the steps to import the Orchid Note – Customer and Item Sales.vi  
Restart the Sage Desktop when prompted for Extender Scripts to take effect.

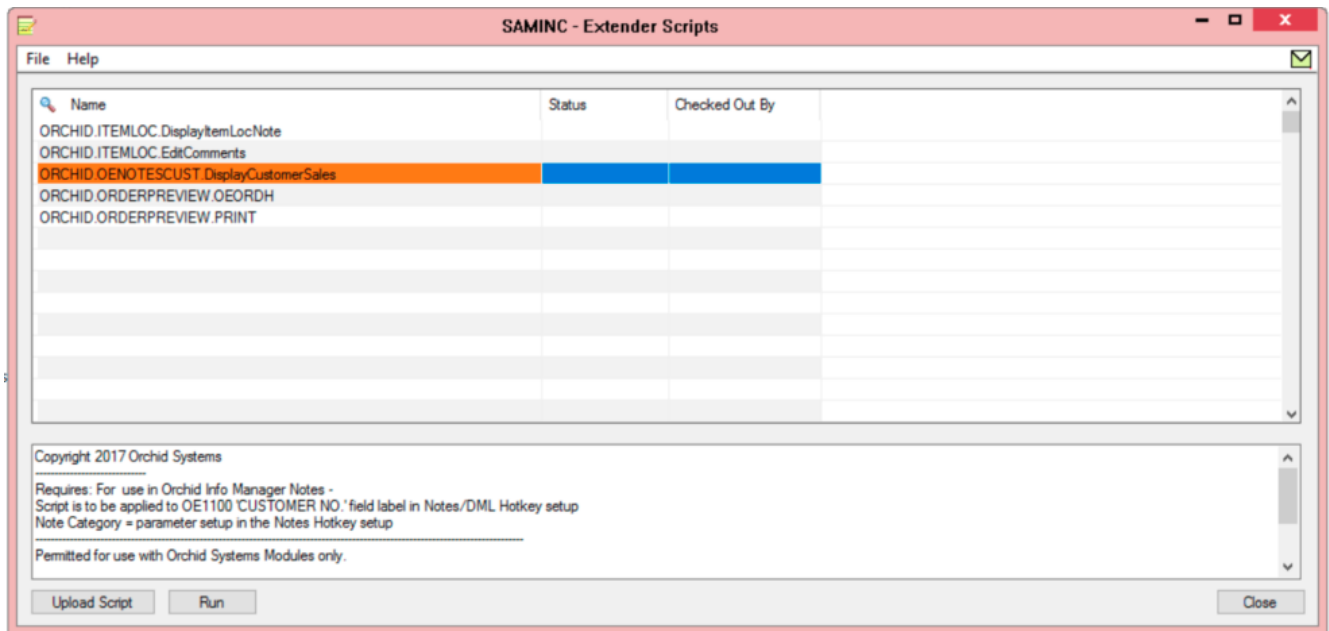
Check the module was imported successfully

*No custom table is included in this module.*

Navigate to Extender / Setup / Scripts

The module includes 1 script:

ORCHID.OENOTESCUST.DisplayCustomerSales	Designed to be run in Information Manager Setup > Options > Notes/DML Hotkey Setup to display the sales history for the customer on the Order.
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## Configure Information Manager Notes

Refer to Orchid notes training guide for detailed setup.

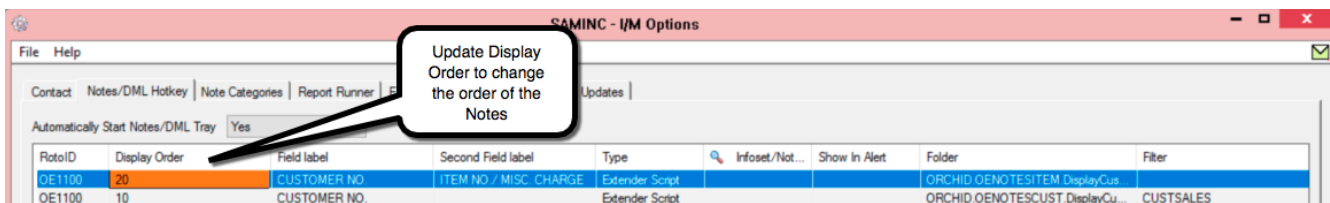
- I/M Options > Note Categories

Note categories determines the background color of the Note.

Create a category - the example uses the following:

Note Category	Where it is used
CUSTSALES	Display the Customer sales history on Order OE screen

- I/M Options > Notes/DML Hotkey Setup



**Details**

Line Number: 2

Type: Extender Script

RotoID: OE1100

Field label - {value}: CUSTOMER NO.

Second Field label - {value2}:

Script: ORCHID.OENOTESCUST.DisplayCustomerSales

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Requires: For use in Orchid Info Manager Notes -  
Script is to be applied to OE1100 'CUSTOMER NO.' field label in Notes/DML Hotkey setup  
Note Category = parameter setup in the Notes Hotkey setup

Permitted for use with Orchid Systems Modules only.

Parameters: CUSTSALES

Notification Method: None

Show alert: Show alert

Heading: Customer Sales

Buttons: Save, Delete, Close

Enter the Note category to set the note background colour

### Insert a row for the Customer Note:

Choose "Extender Script" as the Note Type.

Field Label: CUSTOMER 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 display the note on the OE Shipment screen as well, you can enter an additional row with OE1200 as the RotoID.

Note: if you leave the Roto ID blank, the note will display for every screen where the "CUSTOMER NO." field label exists.

If you want to use a different category, update the parameter on the Notes/DML Hotkey Setup screen.

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

## Entering an OE Order

The Total Sales for the customer and the quantity, sales and average price for each item in the grid are displayed.

If you want to modify the information that is shown (e.g. only show last month or last year's sales for the customer), you can modify the query in the Extender script.

Go to Extender > Setup > Scripts > select the script, right click and choose Edit.

The screenshot displays the 'SAMINC - O/E Order Entry' window. The main form contains fields for Order No. (NEW), Customer No. (1200), Mr. Ronald Black, and various dates and locations. A table lists order items, with the first item being 'A1-103/0' with a quantity of 85. A summary panel on the right shows 'Customer Sales - 1200' with a total sales of \$14,086. Below this, a table shows 'Customer and Item Sales - 1200/A1-103/0' with columns for Qty Sold, Net Sales, and Average Price.

Lin...	Type	Item No / Misc. Charge	Klt/BOM	Description	Price List	Location	Deliver By	Exp. Ship Date
1	Item	A1-103/0					2/09/2017	2/09/2017

Location	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
All Locations	0	0	0	0	0

Customer and Item Sales - 1200/A1-103/0	Qty Sold	Net Sales	Average Pric...
	85	\$5,099	\$60