Orchid Systems’ Extender

*Create, file and email PO Purchase Order*

Setup Documentation

# What’s Included

A single Extender module script imported through Orchid Systems’ Extender adds

* A button to the PO Purchase Order Entry screen that, when clicked, prints and auto creates the PO Purchase Order and files the document in Document Management Link’s configured folder for Purchase Orders documents and emails the PO to the Vendor
* Adds a CONTAINER optional field to the PO Entry grid. This requires the CONTAINER text optional field to be added to the PO Detail in PO Setup.

The module script is named: Orchid - Demo – OE Order Print and Email.vi

It contains:

* One Extender OCX Python script that adds the button to the OE Order Screen, creates the PDF, saves the PDF and emails the PDF.
* One Extender script that adds the CONTAINER optional field to the grid.
* The definition of a custom table [VIOEPRNT] that contains the path where the PDF is to be created, the name of the crystal report to be used for the order confirmation form and the Extender email message template to be sent to the customer.
* The email message template.

# Disclaimer

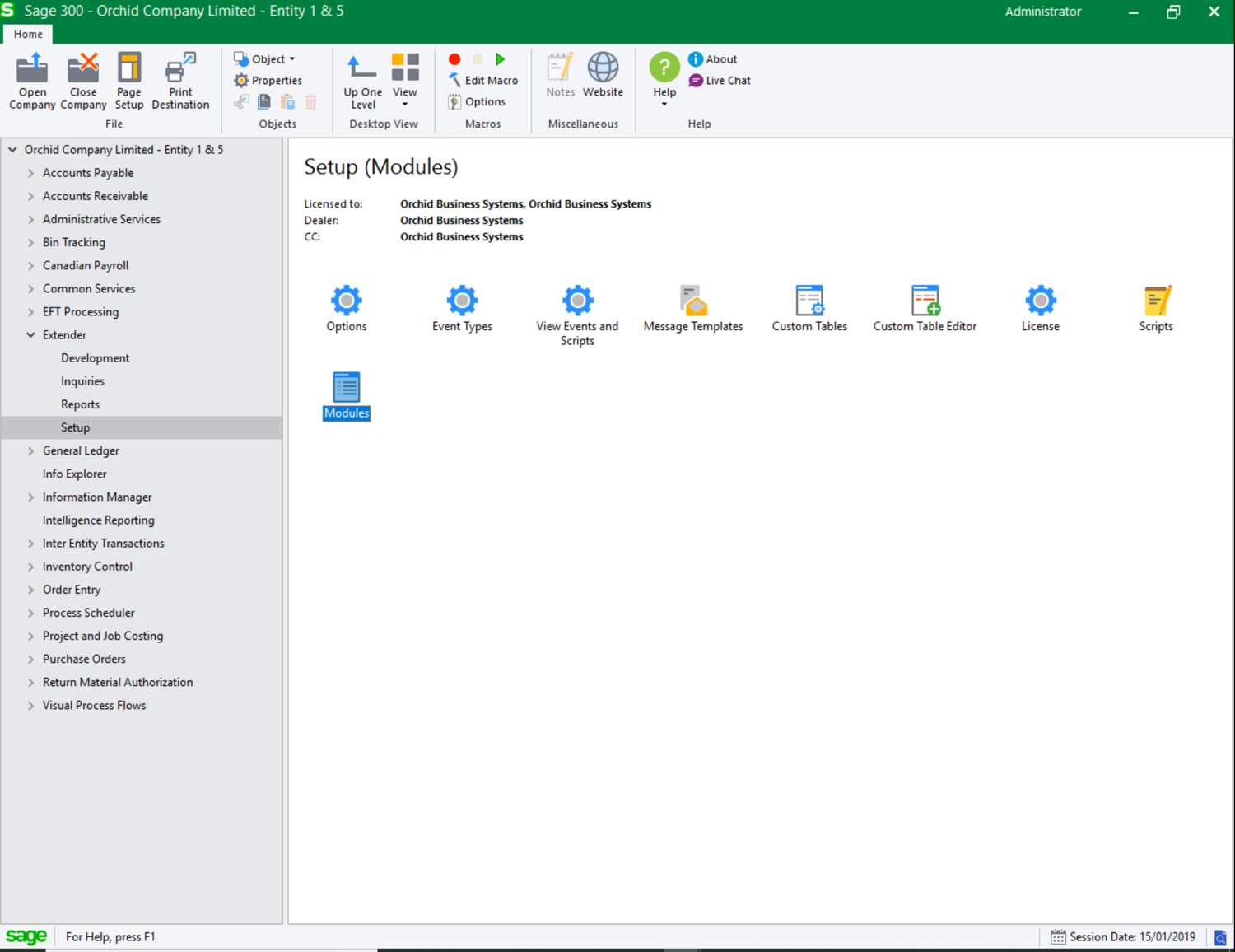
This application is to be used with Sage 300 and Orchid Systems modules only.

Orchid Systems provides the application as-is having been developed and tested in-house using a standard Sage 300 implementation with Sage sample data.

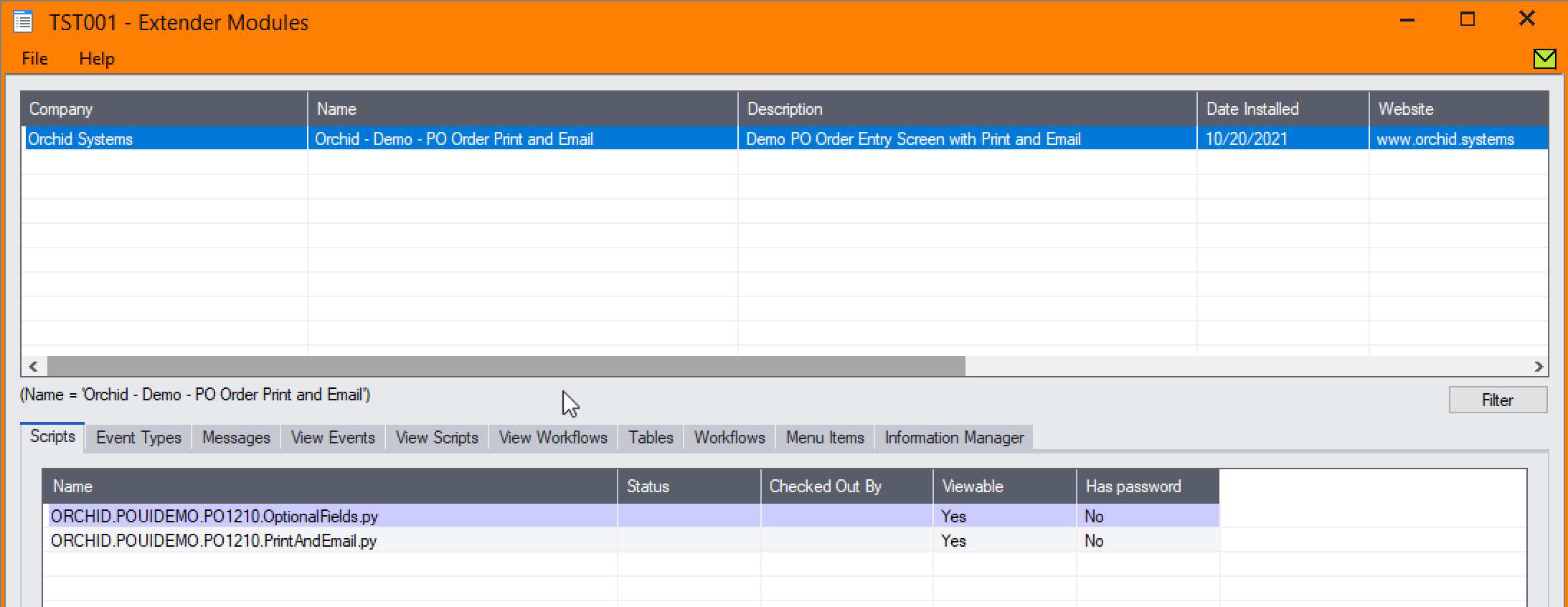
If this code is deployed in a live production environment it is the responsibility of the End User to ensure that it is operating as required.

# Importing the Module Script.

From the Extender Setup menu, select the Modules screen.



When the Modules screen opens, press [IMPORT] and import the module script: Orchid - Demo - OE Order Print and Email.vi



# View Script / Custom Table and email message template

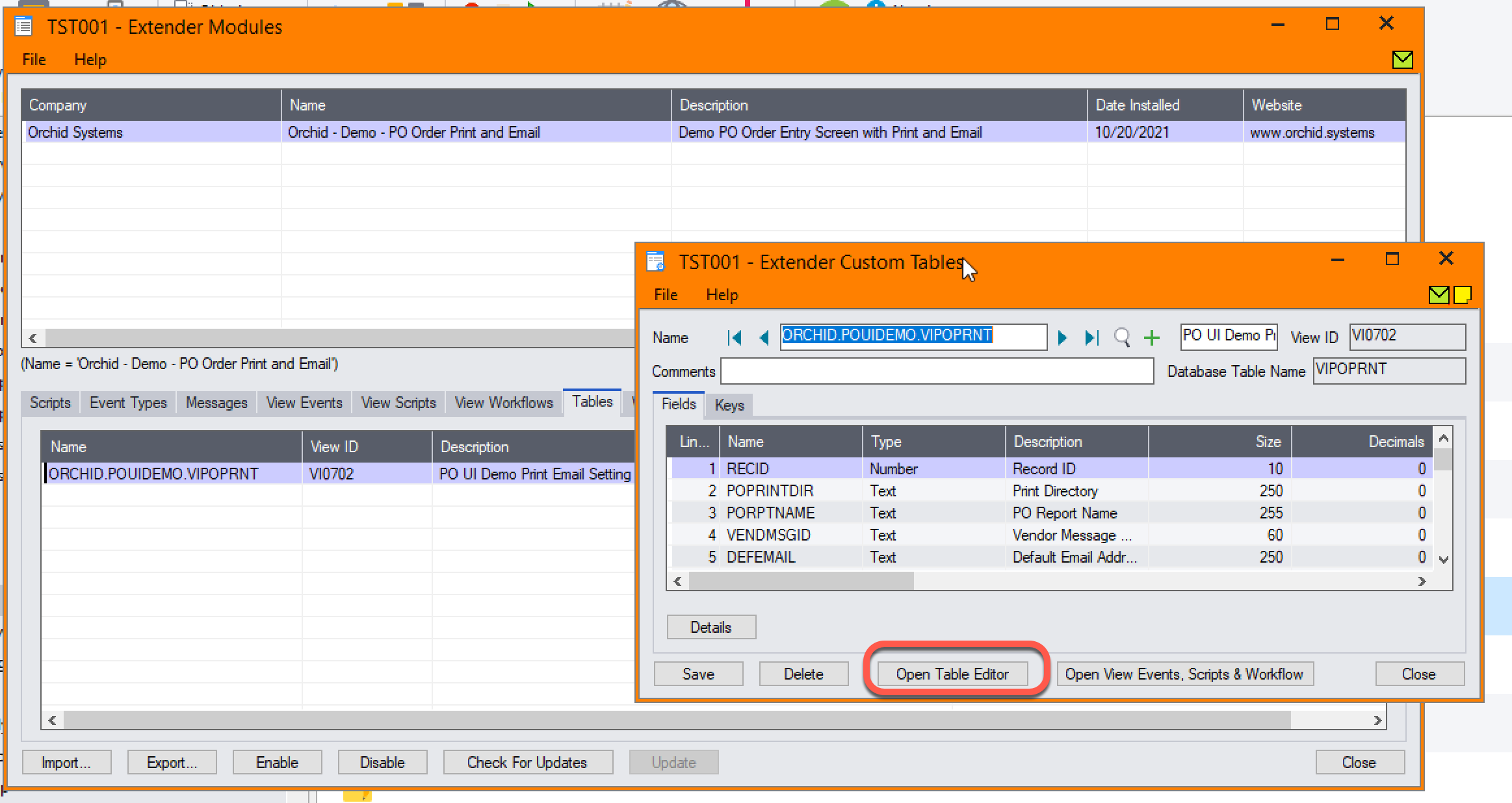
Importing the module will automatically

* Create the configuration table required
* Create the OCX Extender scripts to add the two buttons and logic to the OE Order Screen (OE1100) and the Optional Field to the grid
* Create the email message template used in sending the customer an email

# Custom Table

A custom Extender table is automatically created as part of importing the module script.

VIOEPRNT – OE UI Demo Print Email Setting.



# Entering data into the Custom Tables view the custom edit screen.

To enter data into the order confirmation create, file and email configuration table, use either

* the standard Extender Custom Table Editor as shown below, or the Custom Tables screen, find the VIOEPRNT table and click “Open Table Editor”.
* Launch the Custom Table Editor from the Extender Setup menu and Select “OE UI Demo Print Email Setting” from the drop down table list, and click “Load”

Graphical user interface, text, application, email

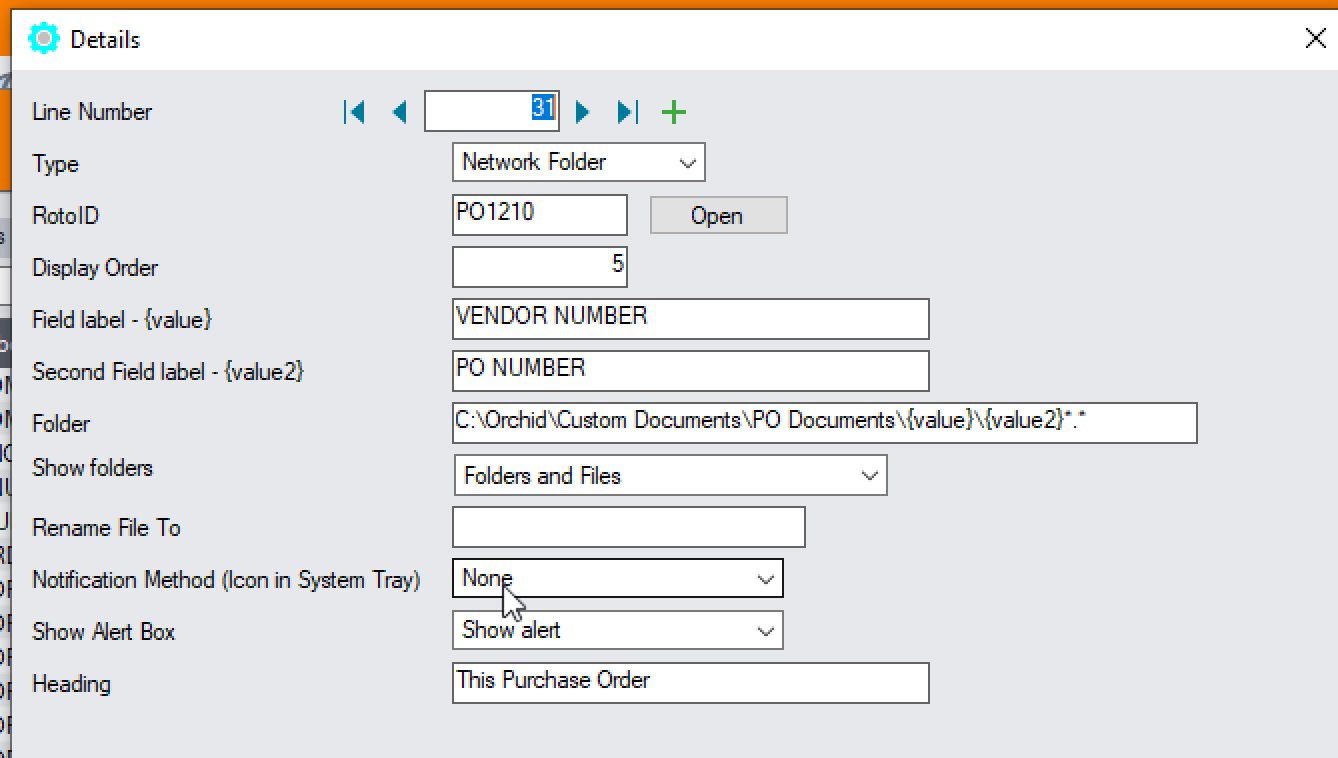
Description automatically generated

Add a new record, with the following details

1. Record ID = 1
2. Print Directory = the directory where the PO PDF will be saved. You can use
   1. {value} to include the Vendor’s ID in the directory structure
   2. {value2} to include the Document Number in the directory structure

The PDF created will be renamed the PO Order Number

Associated configuration From IM Setup->Options \ Notes & DML Hotkey tab. Directories must match to view the documents in the tray.



1. The PO report group name followed by the PO Purchase Order Crystal Form to use in square brackets
   1. PO Group name POPOR01
   2. Purchase Order Crystal Form [POPOR01.RPT]
2. Key in the email message id to be used when emailing sales order confirmations to the customers: ORCHID.POUIDEMO.MSG
3. Key in an email address to be used when the customer has a “destination” of email or contact email, and the configured email address is blank

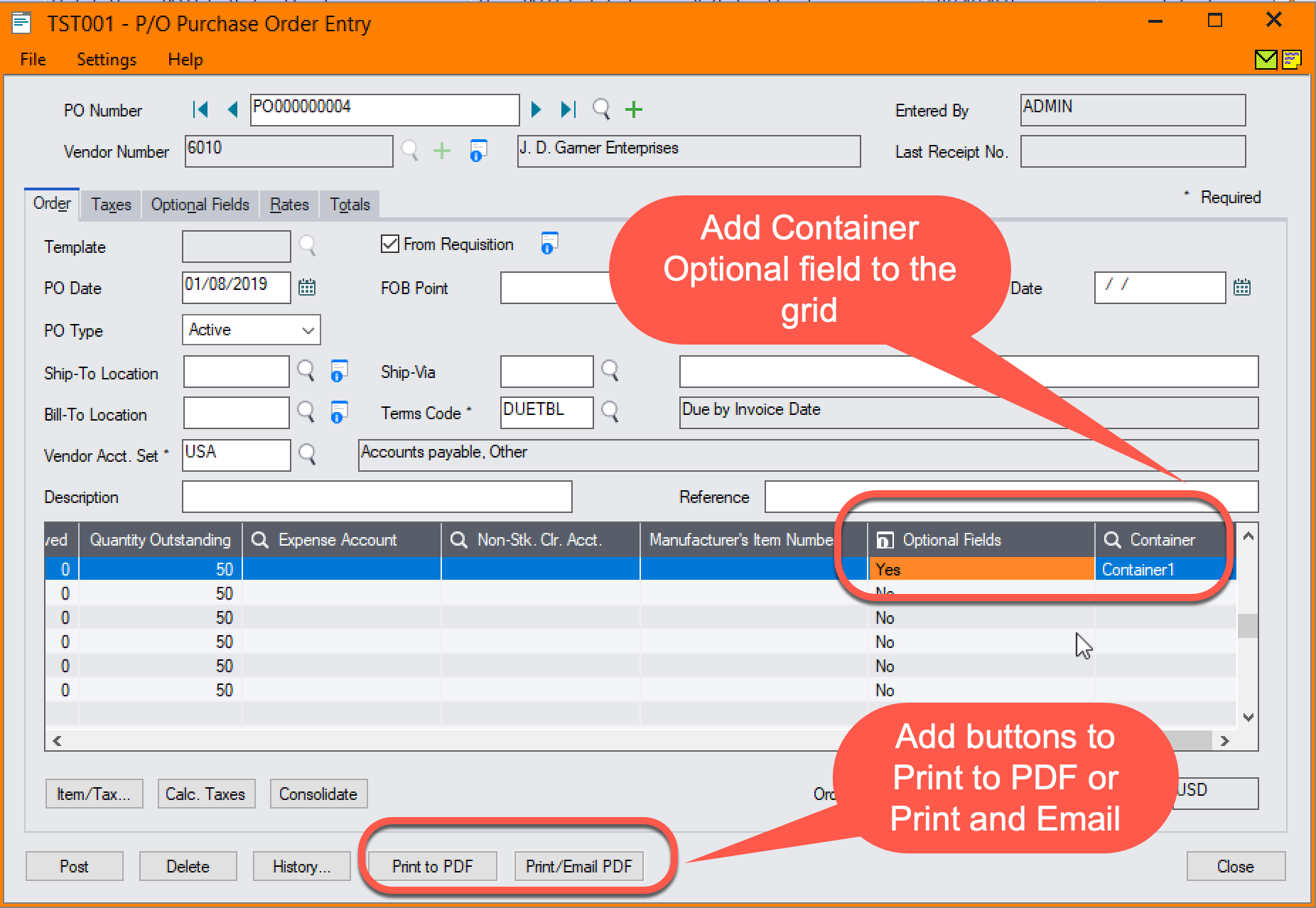
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# Email Message

An Extender email message template is automatically created as part of importing the module script. You can modify it in Extender Message Templates.

# How the custom OCX script works.

The Extender OCX Script adds two buttons on the PO Purchase Order entry Screen



1. Print to PDF: when clicked the script will
   1. Create a PDF
      1. Using the PO Report group/crystal report configured in VIPOPRNT:PO Report Name
      2. Rename the PDF to the Purchase Order Number
      3. Save the PDF in the PO Directory configured in VIPOPRINT:Print Directory
2. Print/Email: when clicked the script will
   1. Create a PDF as above
   2. Check the AP Vendor’s delivery method
      1. If email, it will send an email to the Vendor’s email address, if the email address is blank, then the VIPOPRNT:Default email address will be used.
      2. If contact email, it will send an email to the Vendor’s Contact email address. , if the email address is blank, then the VIPOPRNT:Default email address will be used
      3. If mail, then no email will be sent

using the message template in VIPOPRNT:Customer Message Template, replacing any variables from the

AP Vendor, PO Purchase Order Header or CSCOM Company recorrd