



PRINT TO PDF AND EMAIL OE ORDER CONFIRMATION AND OE INVOICE

BUSINESS REQUIREMENT

Client wants to save PDF in folders configured for Document Management Link and email them to customers from a single button on the OE screen.

KEY LEARNINGS

The module includes a custom script to add two buttons on the OE1100 screen. One to print and email OE Order confirmation, one to print and email OE Invoice.

The module also includes a custom table to maintain the configuration details.

STEPS TO INSTALL AND CONFIGURE

- Import module and restart the Sage desktop
- Use the Custom table Editor to configure the printing parameters

Extender Module to Print and Email OE Documents

ORCW02 - OE Orders Print Email Setting

File Help

Record ID OE Print 1

Folder for OE Order Conf C:\Orchid\Custom Documents\OE Documents\{value}\{value2}

Folder to save OE Invoice C:\Orchid\Custom Documents\OE Documents\{value}

OE Conf Report Name OECONF03[OECONF03.rpt]

Order Conf Msg Template ORCHID.OEORDERS.MSG Msg Template

Default Email Address test@orchid.systems

OE Invoice Rpt Name OEINV04[OEINV04.rpt]

Invoice Msg template ORCHID.OEORDERS.INVMSG OE Invoice email

BCC Email Address test@orchid.systems

The module can create subfolders by customer / Order number / invoice number
{value} is replaced by the customer ID
{value2} is replaced by the Order Number for Order confirmation documents, by Invoice Number for O/E Invoices.

In the example above, we create a subfolder per order confirmation (as you may need to store other documents such as the PO in the subfolder. We save all OE Invoices in a subfolder per customer.

USING IT

OE Orders Print and Email app adds custom buttons to the O/E Order Entry screen to print and email Order Confirmation and O/E Invoices (based on the Last Invoice Number on the OE Order).

Extender Module to Print and Email OE Documents

Lin...	Type	Item No. / Misc. Charge	Kit/BOM	Description	Price List	Location	Deliver By	Exp. Ship Date
1	Item	A1-103/0		Fluorescent Des...	USA	4	15/01/2019	15/01/2019
2	Item	A1-105/0		13W Mini Fluore...	USA	1	15/01/2019	15/01/2019
3	Item	A1-400/0		Desk Note Book	USA	4	15/01/2019	15/01/2019
4	Item	A1-450/0		Bulletin Board	USA	4	15/01/2019	15/01/2019

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	206	10	0	0	206
All Locations (Ea.)	655	32	486	0	655

The customer email address is based on the customer delivery method configured in AR.

Email: AR Customer company email (EMAIL2)

Email (Contact): AR Customer contact email (EMAIL 1)

Multiple Contact: Contacts flagged to receive OE Confirmation

Blank email: Email Admin address in config table and if using OE Desktop screen, display a warning message.

If the customer's delivery method is set to Mail, the PDF is generated and saved in the configured folder, but not emailed.

For OE Invoice, it uses the last invoice number on the OE Order.