



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

ORCW02 - O/E Order Entry

File Settings Help

Order No. ORD000000000001 No. of Shipments 0 Last Shipment No. Last Invoice No.

Customer No. 1200 Mr. Ronald Black

Template Code ACTIVE PO No. Status: Posted Entered By: ADMIN

Order Date 15/01/2019 On Hold

Order Type Active From Multiple Quotes Job Related Project Invoicing Retainage

Ship-To Location WAREHS Location 4 Port of San Francisco

Deliver By 15/01/2019 Exp. Ship Date 15/01/2019 Calc. Tax

Ship Via CCT Cross-Country Trucking Lines Tracking No. Reference Ref 0901-1

Description Ship asap

| Lin... | Type | Q Item No. / Misc. Charge | Q Kit/BOM | Description | Q Price List | Q 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 |

Item/Tax... Components... Ship All Order Subtotal 816.65

Post Create PO Delete History... Prepayment... Conf PDF/Email Inv PDF/Email Close

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.