



SAMPLE SCRIPT TO DISPLAY TAIROX CRM NOTES IN INFORMATION MANAGER NOTES IN O/E

BUSINESS REQUIREMENT

User creates Notes for Customers in Tairox CRM and wants to display some Notes in Order Entry when the customer is selected.

The solution requires Tairox CRM, Orchid Information Manager Notes and Extender Customizer or Developer Edition installed and activated.

KEY LEARNINGS

Sample includes an Extender Script that read Tairox Customer Notes and displays the last entered note for the customer selected in O/E Order.

The script can be modified to display all notes, or only certain types of Notes, or other records linked to Customers.

Notes/DML/Extender setup includes a row configuration to display the Extender script.

You can create other configuration to display Notes in A/R Customers for example, and may need to amend the script accordingly.

SAMPLE FILES

Extender Module – ***Tairox CRM Note Integration***

Go to Extender Setup > Modules > Import

This imports an Extender script – DisplayCustomerNoteFromCRM and a row configuration in I/M Options

The script uses CSQuery to read Company Notes based on the customer ID on the screen.

Extender Workflow Example

The image shows two screenshots of the ORCWF2 application. The top screenshot displays the 'ORCWF2 - Extender Scripts' window with a table of scripts. The bottom screenshot displays the 'ORCWF2 - I/M Options' window with a 'Details' dialog box open, showing configuration for an 'Extender Script'.

ORCWF2 - Extender Scripts

Name	Status	Checked Out By	Viewable	Has password
CreditCheckActions.Workflow.CheckContactDetails			Yes	No
CreditCheckActions.Workflow.CheckCreditLimit			Yes	No
CreditCheckActions.Workflow.CheckCustomerDetails			Yes	No
CreditCheckActions.Workflow.CheckCustomerOnHold			Yes	No
CreditCheckActions.Workflow.CheckOverdueInvoices			Yes	No
CreditCheckActions.Workflow.CheckRDCheques			Yes	No
ORCHID.OENOTESCUST.DisplayCustomerSales			Yes	No
Orchid.TairoxCRM.DisplayCustomerNoteFromCRM			Yes	No

ORCWF2 - I/M Options

Automatically Start Notes/DML Tray: Yes

RotolD	Display Order	Field label	Second Field label	Type	InfoSet/Not...	Show In Alert	Folder
OE1100	0	CUSTOMER NO.		Extender Script			Orchid.TairoxCRM.Dis

Details

Line Number: []

Type: Extender Script

RotolD: OE1100

Field label - {value}: CUSTOMER NO.

Second Field label - {value2}:

Script: Orchid.TairoxCRM.DisplayCustomerNoteFromCRM

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displays a note created from Tairox CRM

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

Parameters: CRMNOTE

Notification Method (Icon in System Tray): None

Show Alert Box: Show alert

Heading: Tairox CRM Notes

SETUP KEY STEPS

Refer to F1 help and online help

- Pre-requisites – Install and activate Extender (Customizer or Developer) and Information Manager Notes in a database where Tairox CRM is active.
- Create a Note category in I/M Options called CRMNOTE and select the background colour.

Extender Workflow Example

TEST AND DEMO THE RESULTS

In Tairox CRM, select a Company and Enter a Note .

The screenshot displays the 'ORCWF2 - Companies' application interface. At the top, there is a menu bar with 'File' and 'Help'. Below the menu bar, a search bar contains 'Bargain Mart - San Diego' and a 'Customer Number' field contains '1100'. A tabbed interface shows 'Companies', 'Contacts', 'Opportunities', 'Documents', 'Cases', 'Notes' (selected), and 'Communications'. A search bar and 'Order By' dropdown are also present.

The main area shows a table of notes:

ID	Name	Note	Created On	Created By	Modified On	Modified By
1	TaiRox Customizations	We believe that we can do Sage 300 custom work f	10-Sep-19	ADMIN	10-Sep-19	ADMIN

A modal window titled 'ORCWF2 - Note' is open, showing the 'Add' form for a new note. The form includes fields for 'Company' (Bargain Mart - San Diego), 'Created On' (--), 'Created By' (empty), 'Modified On' (--), 'Modified By' (empty), 'Name' (Backorder), and 'Note' (Allows Backorder.). There is a green '+' icon next to the 'Name' field. At the bottom of the modal, there are 'Add', 'Change Log...', and 'Cancel' buttons.

Go to Order Entry, select the customer, see the Notes Panel.

ORCWf2 - O/E Order Entry
X

Order No.

Customer No. + - ?

No. of Shipments

Bargain Mart - San Diego

Last Shipment No.

Last Invoice No.

Order Customer Tags Optional Fields Sales Split Rates Totals Required

Template Code

PO No.

Status:

Entered By:

Order Date

☐ On Hold

Order Type

☐ From Multiple Quotes ?

☐ Job Related

☐ Project Invoicing

☐ Retainage

Ship-To Location

Location

Central warehouse - Seattle

Deliver By

Exp. Ship Date

☒ Calc. Tax

Ship Via

Cross-Country Trucking Lines

Tracking No.

Description

Reference

Lin.	Type	Q Item No / Misc. Charge	Q Kt/BOM	Description	Q Price List	Q Location	Deliver By	Exp. Ship Date

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

Order Subtotal

0.00

USD

Post
Create PO
Delete
History...
Prepayment...

Close