

O/E Order default values and data validation - Template and Order Type

BUSINESS REQUIREMENT

A company wants to configure O/E so that some users can only enter O/E Quotes.

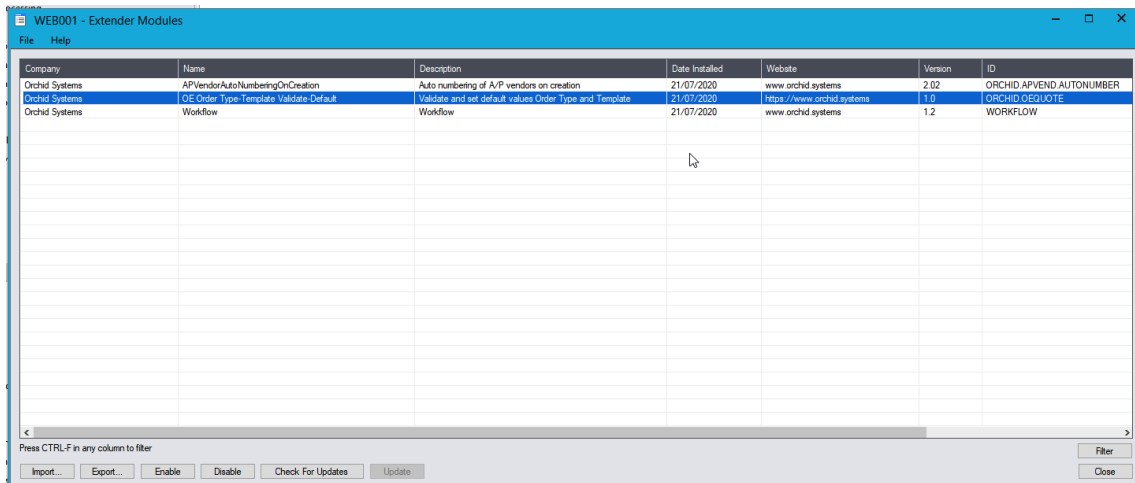
KEY LEARNINGS

Module includes a View script attached to Order Header View OE0520
Use a module for ease of deployment.

EXTENDER SETUP KEY STEPS

Install the latest product update for Extender.

In Extender Setup > Modules, import the downloaded file.



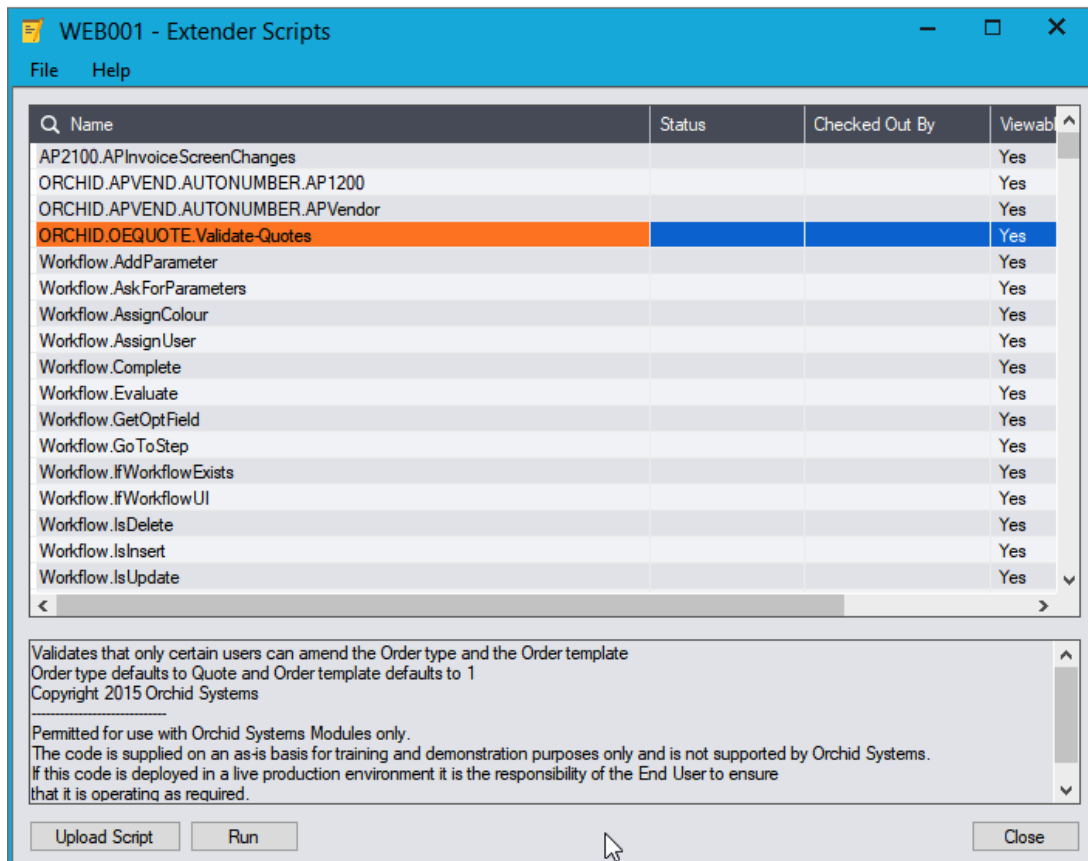
The screenshot shows a software window titled "WEB001 - Extender Modules". It contains a table with the following data:

Company	Name	Description	Date Installed	Website	Version	ID
Orchid Systems	APVendorAutoNumberingOnCreation	Auto numbering of A/P vendors on creation	21/07/2020	www.orchid.systems	2.02	ORCHID.APVEND.AUTONUMBER
Orchid Systems	OE Order Type Template Validate Default	Validate and set default values Order Type and Template	21/07/2020	https://www.orchid.systems	1.0	ORCHID.OEQUOTE
Orchid Systems	Workflow	Workflow	21/07/2020	www.orchid.systems	1.2	WORKFLOW

Below the table, there is a status bar with the text "Press CTRL-F in any column to filter". At the bottom of the window, there are buttons for "Import...", "Export...", "Enable", "Disable", "Check For Updates", and "Update". On the right side, there are "Filter" and "Close" buttons.

Restart the Sage desktop.

YOU CAN VIEW THE SCRIPT IN EXTENDER SETUP > SCRIPTS



VARIATIONS

- Use a parameter list configured in View Events, Scripts and Workflow for the list of valid users and the default quote.
- Use custom tables to link users and default templates
- Default OE Order template based on customer's attribute
- Use Sage security profiles.

TESTING

Create two O/E Templates, ACTIVE for Active Orders, 1 for Quotes.

Login to Sage 300 as a user who is not ADMIN.

In the OE Order screen, enter a customer number: The template defaults to 1 and the Order type field = Quote and is not editable.

Requirement!

This functionality requires Extender Developer.