

OE Extender Script and Note setup

Description

The Extender module creates a custom Extender table to store comments by Sage 300 I/C Item and Location and creates a Note to display the comments on the O/E Order screen.

The module includes 2 scripts:

1. Custom screen to enter data
2. Display the comments in an Information Manager Note on the O/E Order Entry screen, based on Item and Location on the order line.

Install Extender and Information Manager Notes

Sage 300 Inventory Control, Orchid Information Manager Notes and Extender must be installed and configured.

Install Extender while all users are logged out of Sage 300.

Activate and restart Sage 300

Setup Extender

Prerequisites

N/A

Import the Extender module.

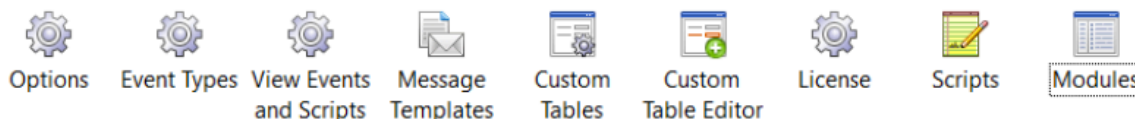
- Extender Modules / Import
- From the Sage Desktop, navigate to Extender / Setup / Modules
- Select Import
- browse to where the Item and Location Notes.vi has been saved.

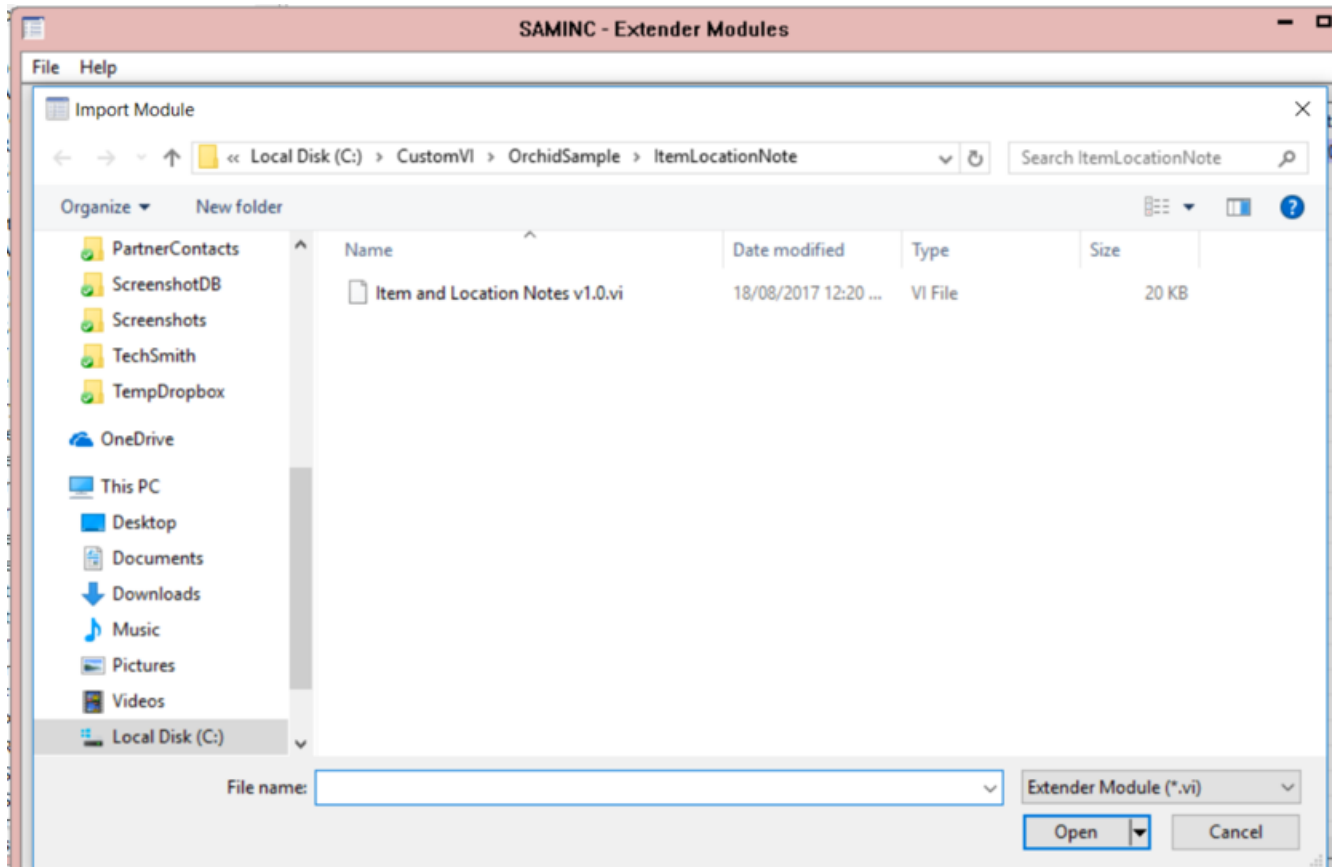
Extender (Modules)

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Dealer:

CC:





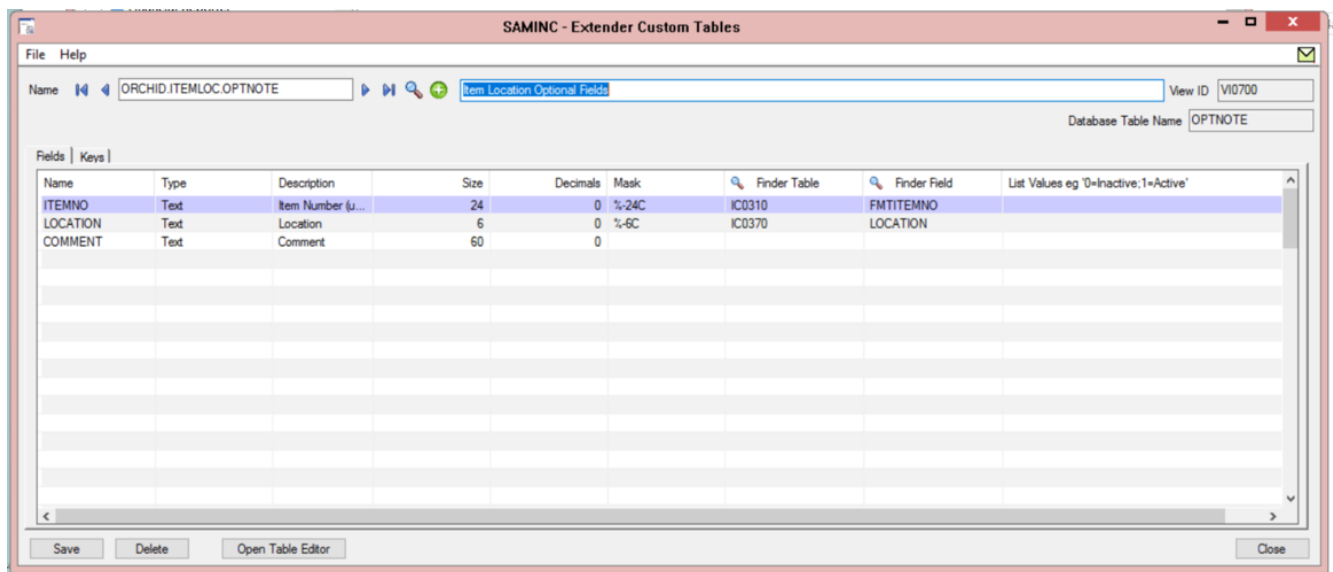
Click Open.

This will create the custom tables, import scripts and link them to the relevant Sage 300 views. Restart the Sage Desktop when prompted for Extender Scripts to take effect.

Check the module was imported successfully

Navigate to Extender/ Setup / Custom Tables to check the custom tables created by Extender. The table is called OPTNOTE and the primary key is composed of ITEMNO and LOCATION.

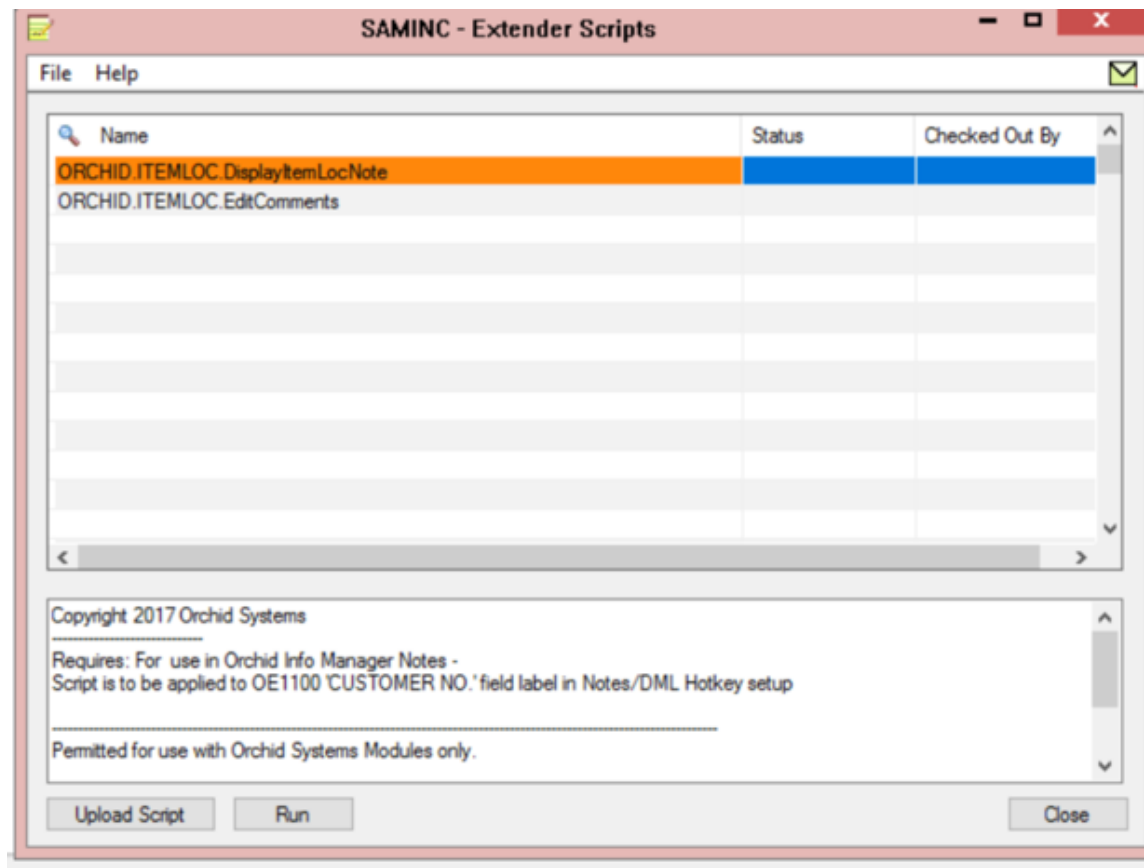
Note: You can add more fields by inserting rows in the Fields grid. Refer to Extender documentation for more information.



Navigate to Extender / Setup / Scripts

The module includes 2 scripts:

EditComments	Use to insert/update records in the custom table.
DisplayItemLocNote	Used in the Info Manager Setup > Options > Notes/DML Hotkey Setup to display the comment relating to the Item/Location combination on the Order



Enter setup data

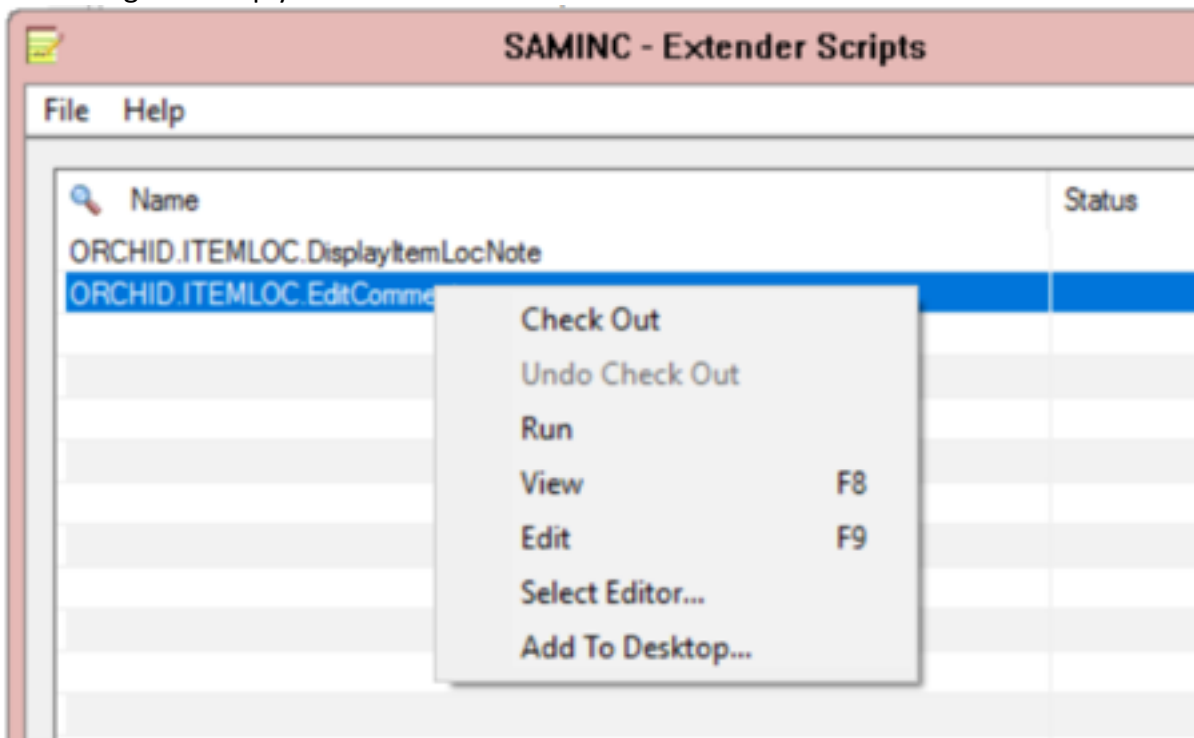
Comments and other optional fields by Item and Location

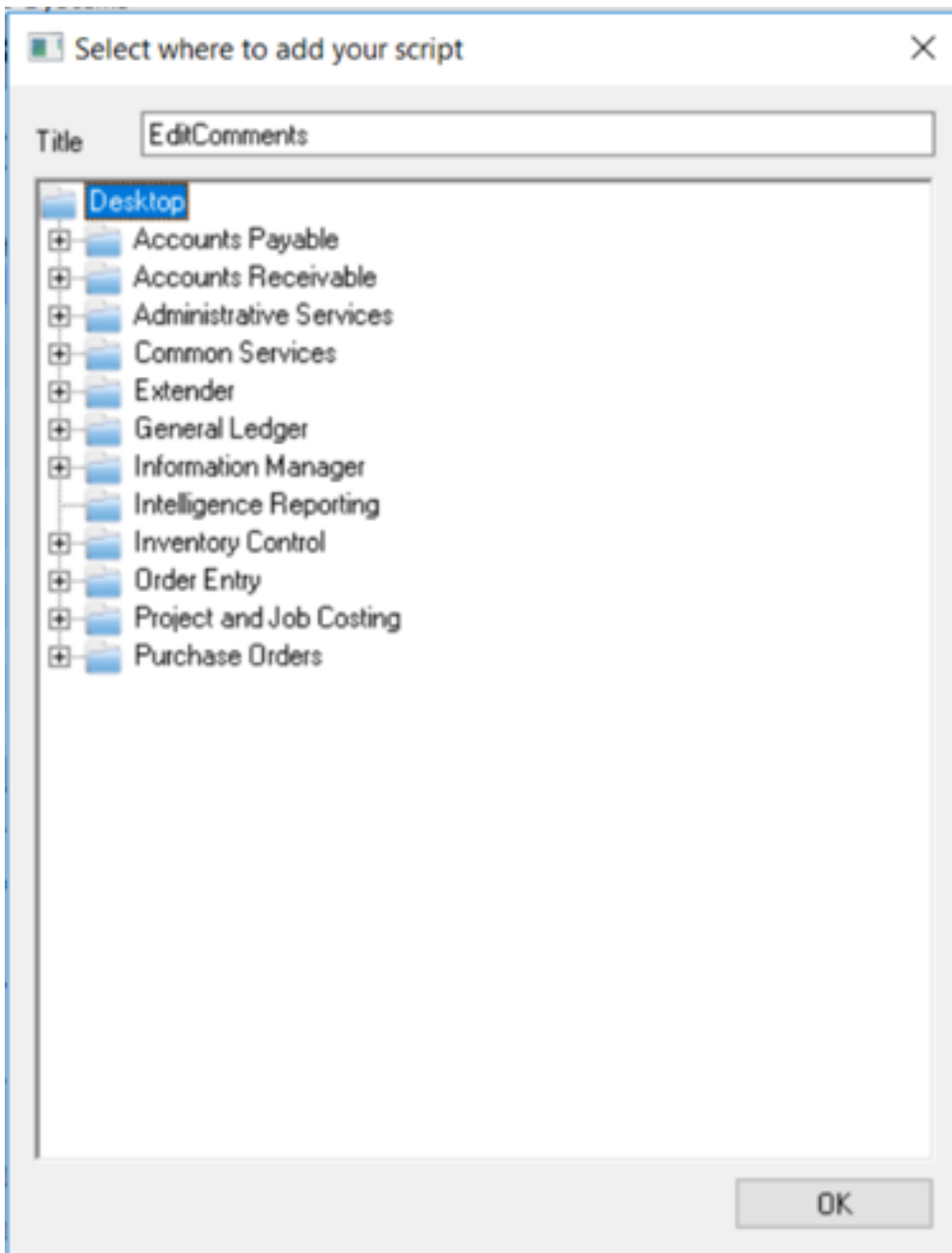
The script includes a custom screen to insert and update the data as the table has a multi-part key and the navigation is more user-friendly in the custom screen.


Note: you can also use the Custom Table Editor in Extender Setup.

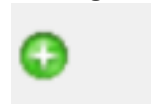
You can also import data from the Custom Table > File Menu > Import Table Records.

You can add this icon to any other Sage menu (copy and paste or go to Extender / Scripts / select the ORCHID.ITEMLOC.EditComments script, right click and choose Add to Desktop. You can choose where on the Sage Desktop you want to add the custom screen.





The custom screen works like a standard Sage 300 screen. You can use the finder  to select existing records,



icon to add new records,



the back and forward arrows to navigate through the records.

Tip: You can write a custom report to view the records entered or use Info Explorer for a quick list.

Configure Information Manager Notes

Refer to Orchid notes training guide for detailed setup.

- I/M Options > Note Categories

Note categories determines the background color of the Note.

Create a category - the example uses the following:

Note Category	Where it is used
ITEMLOC	Display the comments for Item and Location in OE screen

Note: If you want to use a different category, Change the parameter in the Notes/DML Hotkey Setup.

- I/M Options > Notes/DML Hotkey Setup

The screenshot shows the 'Details' window for configuring an Orchid Extender Script. The fields are as follows:

- Line Number: 2
- Type: Extender Script
- RotoID: OE1100
- Field label - {value}: ITEM NO / MISC. CHARGE
- Second Field label - {value2}: LOCATION
- Script: ORCHID.ITEMLOC.DisplayItemLocNote
- Copyright 2017 Orchid Systems
- Requires: For use in Orchid Info Manager Notes - Script is to be applied to OE1100 'CUSTOMER NO.' field label in Notes/DML Hotkey setup
- Permitted for use with Orchid Systems Modules only.
- Parameters: ITEMLOC
- Notification Method: None
- Show alert: Show alert
- Heading: Item Location Comments

A red callout points to the 'Parameters' field, which contains 'ITEMLOC', with the text 'This parameter is used as the Note Category'.

Insert a row for the Item / Location notes

Choose “Extender Script” as the Note Type.

Field Label: ITEM NO./ MISC. CHARGE

Field Label 2: F.LOCATION if you want to use the Order Header location or G.LOCATION if you want to use the Order detail location.

Enter OE1100 as the RotoID: this will ensure the note is displayed only on the O/E Order Entry screen.

If you want to display the note on the OE Shipment screen as well, you can enter an additional row with OE1200 as the RotoID.

Note: if you leave the Roto ID blank, the note will display for every screen where the “ITEM No. /MISC. CHARGE” and “LOCATION” Fields exist.

The screenshot shows the 'SAMINC - I/M Options' window. It has a menu bar with 'File' and 'Help'. Below the menu bar is a tabbed interface with tabs for 'Contact', 'Notes/DML Hotkey', 'Note Categories', 'Report Runner', 'Email', 'Suppl. Data', 'Sharepoint', and 'Updates'. The 'Notes/DML Hotkey' tab is selected. Below the tabs is a section 'Automatically Start Notes/DML Tray' with a dropdown menu set to 'Yes'. The main area is a table with the following columns: 'RotoID', 'Display Order', 'Field label', 'Second Field label', 'Type', 'Infoset/Not...', 'Show In Alert', and 'Folder'. The table contains three rows: 1. RotoID: OE1100, Display Order: 0, Field label: ITEM NO./ MISC. CHARGE, Second Field label: LOCATION, Type: Extender Script, Infoset/Not...: ITEM, Show In Alert: All Notes, Folder: ORCHID.ITEMLOC.D. 2. RotoID: OE2200, Display Order: 10, Field label: SHIPMENT NUMBER, Second Field label: SHIPCOMMENT, Type: Note, Infoset/Not...: SHIPCOMMENT, Show In Alert: All Notes, Folder: . 3. RotoID: OE2200, Display Order: 20, Field label: SHIPMENT NUMBER, Second Field label: ITEM NO./ MISC. CHARGE, Type: Note, Infoset/Not...: SHIPDTLCOMM..., Show In Alert: All Notes, Folder: . Below the table is a 'Details' button and a note: 'Note: If you change these settings you must restart/refresh the tray'. At the bottom are 'Export...', 'Import...', 'Save', and 'Close' buttons.

RotoID	Display Order	Field label	Second Field label	Type	Infoset/Not...	Show In Alert	Folder
OE1100	0	ITEM NO./ MISC. CHARGE	LOCATION	Extender Script	ITEM	All Notes	ORCHID.ITEMLOC.D
OE2200	10	SHIPMENT NUMBER	SHIPCOMMENT	Note	SHIPCOMMENT	All Notes	.
OE2200	20	SHIPMENT NUMBER	ITEM NO./ MISC. CHARGE	Note	SHIPDTLCOMM...	All Notes	.

Save the I/M Options

Refresh the Info Manager Tray or Restart the Sage Desktop.

Entering an OE Order

SAMINC - O/E Order Entry

File Settings Help

Order No. ORD000000000097

No. of Shipments 1

Last Shipment No. SH000000000000000000101

Customer No. 1200

Mr. Ronald Black

Last Invoice No.

Order Customer Tags Optional Fields Sales Split Totals

Template Code ACTIVE

PO No.

Status: Posted

Entered By: ADMIN

Order Date 14/08/2017

☐ On Hold

Order Type Active

☐ From Multiple Quotes

☐ Job Related

☐ Project Invoicing

☐ Retainage

Ship-To Location

Location 2

Portland Office

Deliver By 14/08/2017

Exp. Ship Date 14/08/2017

☒ Calc. Tax

Ship Via CCT

Cross-Country Trucking Lines

Tracking No.

Description

Reference

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	1	14/08/2017	14/08/2017
2	Item	A1-103/0		Fluorescent Des...	USA	2	14/08/2017	14/08/2017

Qty. on Hand

Qty. on Sales Order

Qty. on Purchase Order

Qty. Committed

Qty. Available

Location 2 (Ea.)	262	21	50	0	262
All Locations (Ea.)	581	223	486	0	581

Item/Tax...

Components...

Ship All

Order Subtotal 0.00

Post

Create PO

Delete

History...

Prepayment...

Close

SAMINC - O/E Order Entry

Item Location Comments - A1-103/0/2

New...

No freight if shipped from Portland location