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Description automatically generated

Orchid Systems Extender

O/E Comments Template

Setup Documentation

# Overview

Comments Templates, as implemented through Orchid Systems’ Extender for Sage 300, provides the end-user with the means to enter default comments spanning multiple lines and save them away as Templates.

These Templates are stored away in a custom table called TEMPLATE.

Maintenance of the Templates is performed through a custom screen.

When these templates are referenced in O/E Sales Order detail line comments, a custom Python script executed by Extender will import the comment strings from the custom table and into the sales order.

# What’s Included

A single custom module script is provided for import into Orchid System’s Extender using the application’s Modules feature:

* COMMENTTEMPLATES.VI

The module script contains the required scripts and setup information required to implement and use O/E Comments Templates.

After importing the module through Extender, the following is made available:

* CommentTemplates.EditTemplates – Python script containing screen definition for Extender to generate an entry/edit screen.
* CommentTemplates.OECOINO – Python script that attaches to the O/E sales order detail comments/instructions view [OECOINO] and copies template comments into sales order comments.
* Comment Templates Setup desktop menu – providing a link to the Comment Templates edit screen.
* Comment Templates Edit screen.
* Custom Table – TEMPLATES – for holding template comments.

# Disclaimer

This application is to be used with Sage 300 and Orchid Systems modules only.

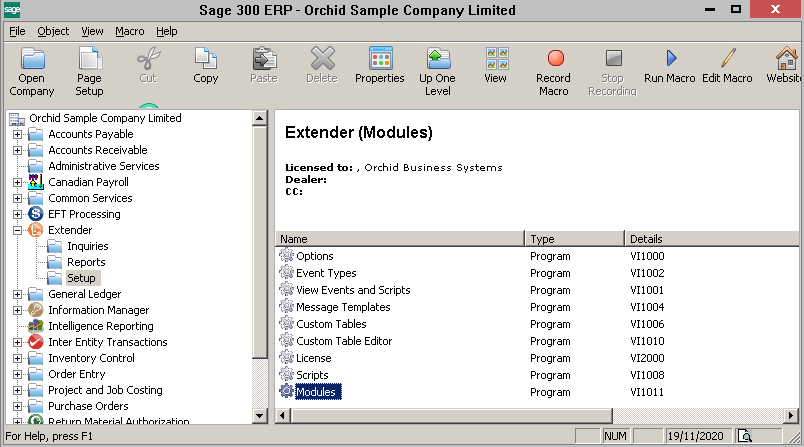
Orchid Systems provides the application as-is having been developed and tested in-house using a standard Sage 300 implementation with Sage sample data.

If this code is deployed in a live production environment it is the responsibility of the End User to ensure that it is operating as required.

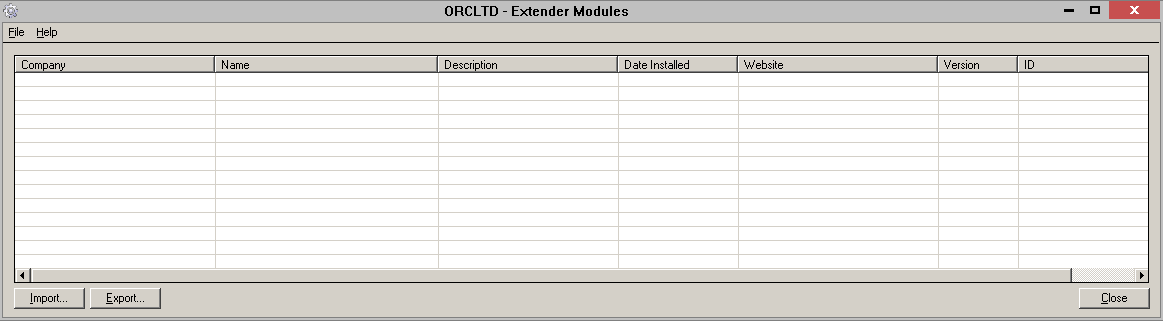
# Importing the O/E Custom Template module

The following these steps to import the COMMENTTEMPLATES.VI into Orchid Systems’ Extender for Sage 300.

1. Save the COMMENTTEMPLATES.vi modules source files in a file directory of your choosing.
2. From within Sage 300, go to the Extender Setup menu. From this menu, choose the Modules setup screen.

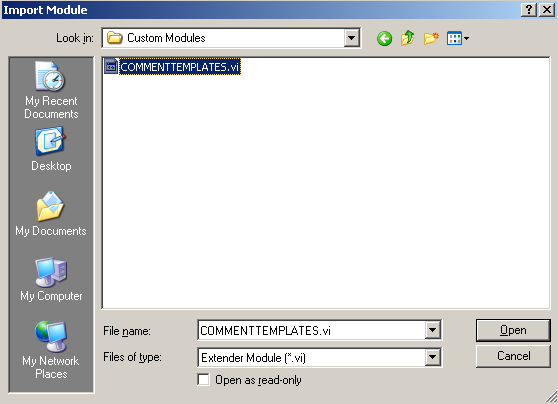


1. Open the Modules setup screen by double-clicking on it.



If no modules have been previously imported, the Extender Modules screen will appear as above.

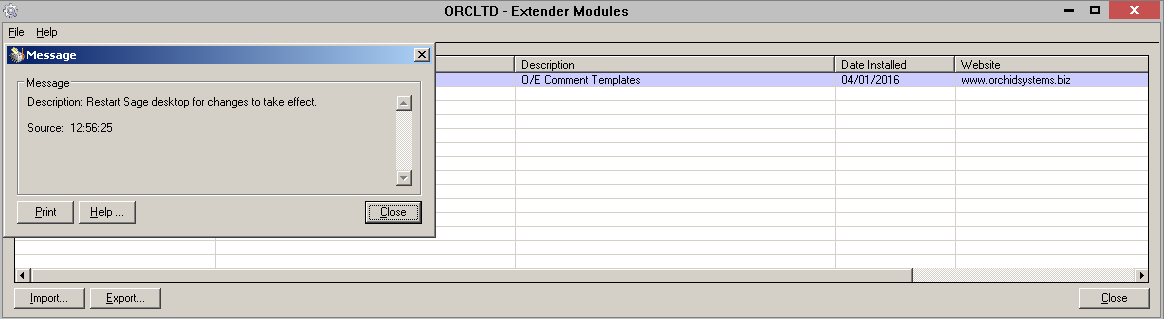
1. Press the [IMPORT…] button on the bottom left hand corner of the screen:



Using the dialog window, navigate to the location were the COMMENTTEMPLATES.vi module file has been saved.

Choose [Open].

Upon importing successfully, the following will be displayed:



Close the Sage 300 database and log back in to effect a desktop restart.

# After Importing

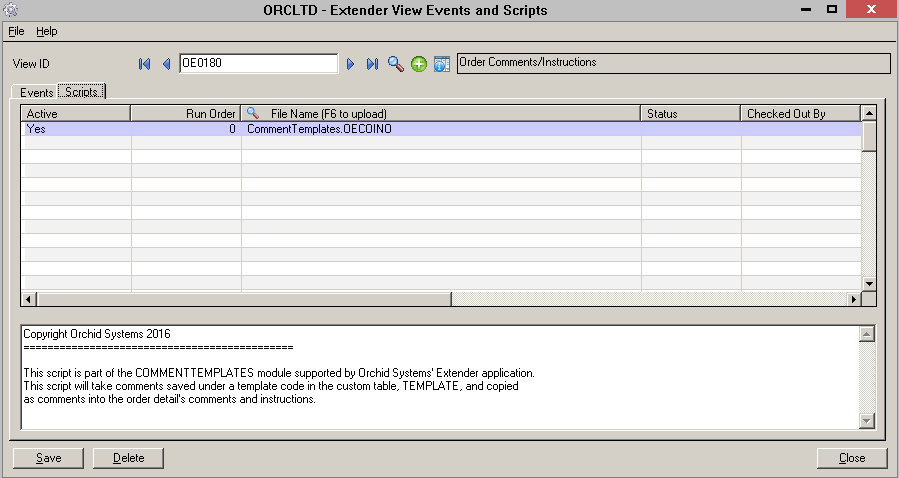
If no errors are reported by Extender when importing the module, restart the Sage 300 desktop to see the results.

## New Scripts Imported – OECOINO view script and Edit Templates screen script.

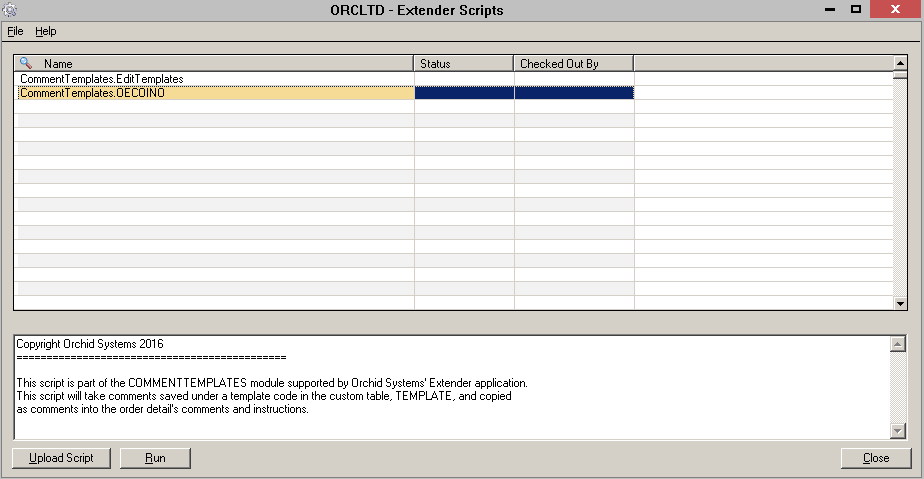
The COMMENTTEMPLATES.vi module supplies a View script that attaches to the Sage 300 Order Entry Orders Comments and Instructions View: OECOINO.

This script is responsible for copying the comments and instructions as entered in the custom Templates table.

The script can be accessed through the Extender View Events and Scripts screen:



It can also be accessed via the Scripts maintenance screen:



As shown above, the module contains two scripts that are imported.

* CommentTemplates.EditTemplates
* CommentTemplates.OECOINO

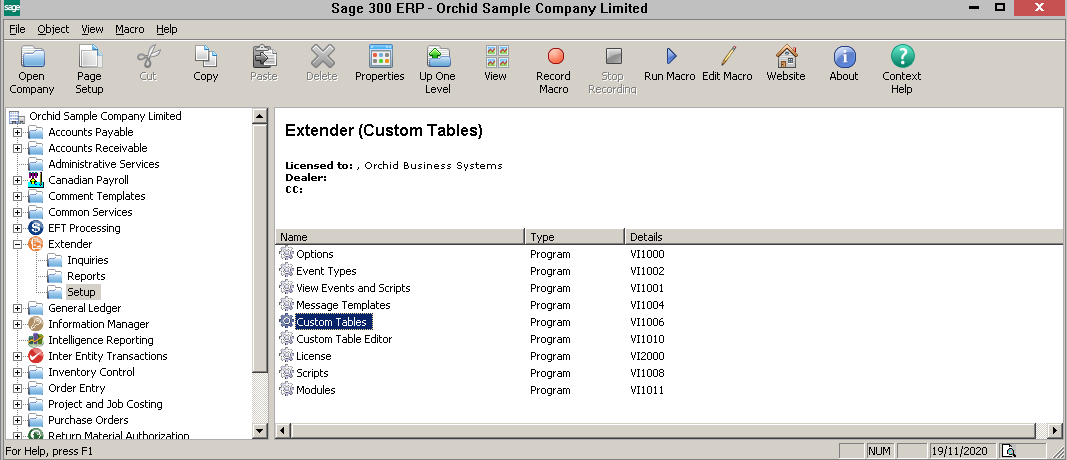
The first script defines an edit screen used for maintaining comment templates. Extender will read the script and construct an edit screen to be used for entering/modifying comments that are saved under a template name.

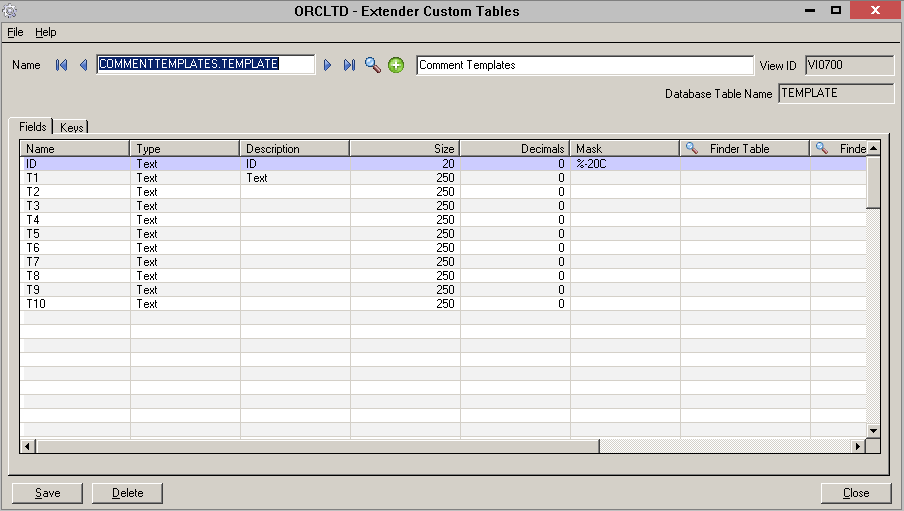
The second script [CommentTemplates.OECOINO] is the script that attaches to the OECOINO view and performs the copying of template comments to the O/E order details.

## Custom Table

The module import process will create a custom table called TEMPLATE.

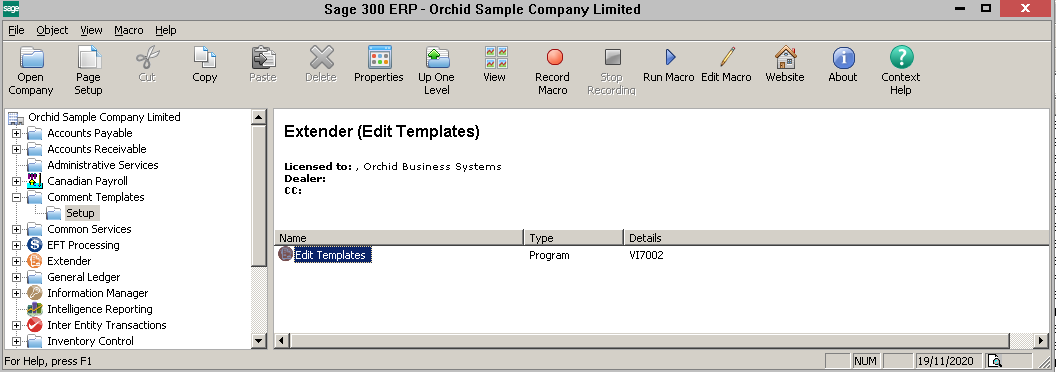
The table’s definition can be seen and amended through Extender’s Custom Tables screen found in the Extender Setup desktop.



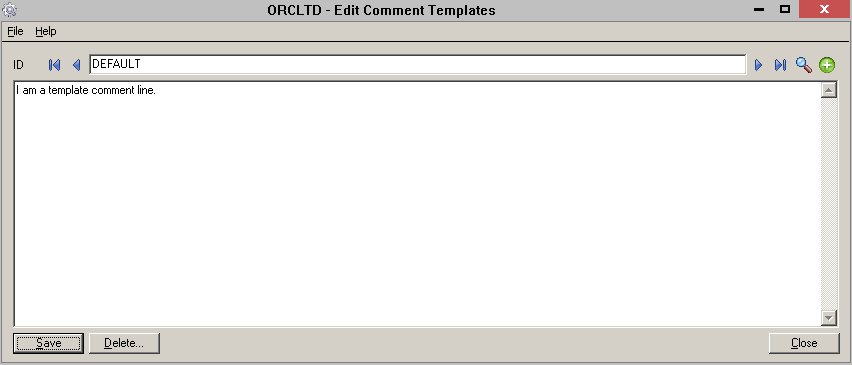


## Comments Templates Desktop Entry

The import process will create Sage desktop entry providing easy access to the Comments Template edit screen.



## Edit Templates Screen



New templates are entered by pressing the new button, entering a string identifier for the template, then entering comment lines that will be defaulted into the O/E order details when the template ID code is used in an O/E order detail comment line.

# How To Use The Customization

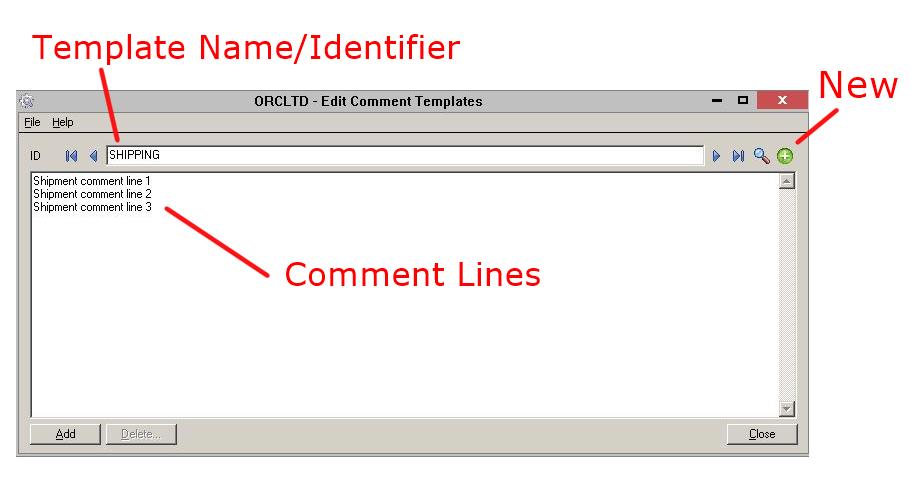
## Creating Comment Templates

Comments and Comment Templates are added through the Edit Templates screen which is imported and added to the Sage Desktop by the Orchid Systems’ Extender application. (see the section Comments Templates Desktop Entry).

Upon opening the Edit Templates screen, press the new record icon.

Enter a Template name or identifier

Enter comment lines that will be imported into the O/E order detail comments when the Template with that identifier is referenced in the comments record.



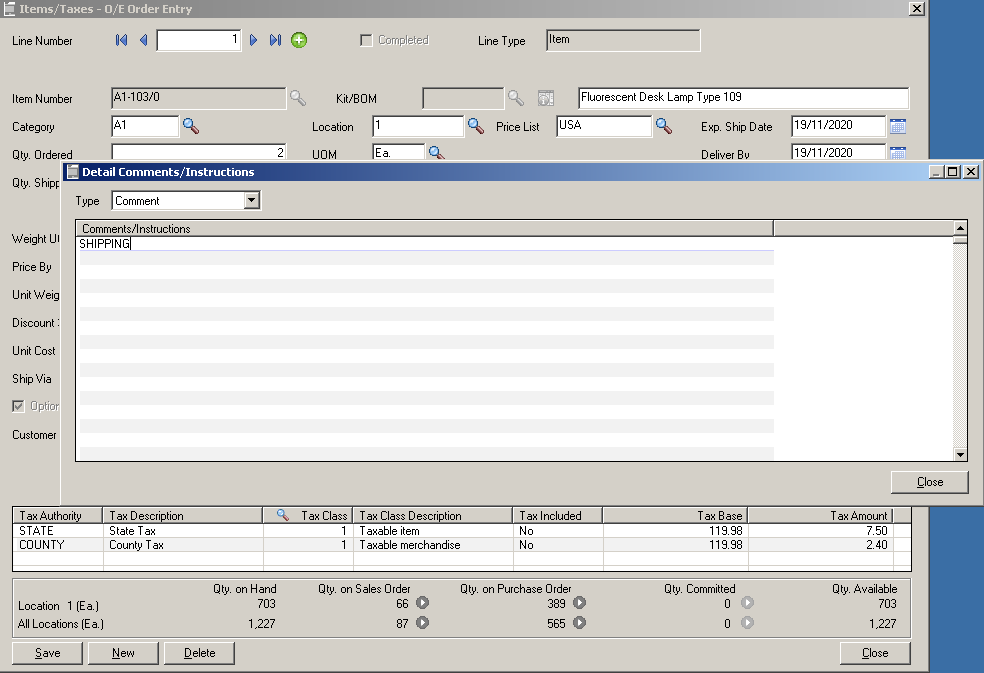
Press [Add] to save the template record.

## Referencing Templates in O/E Sales Order Comments/Instructions

Create a new O/E sales order.

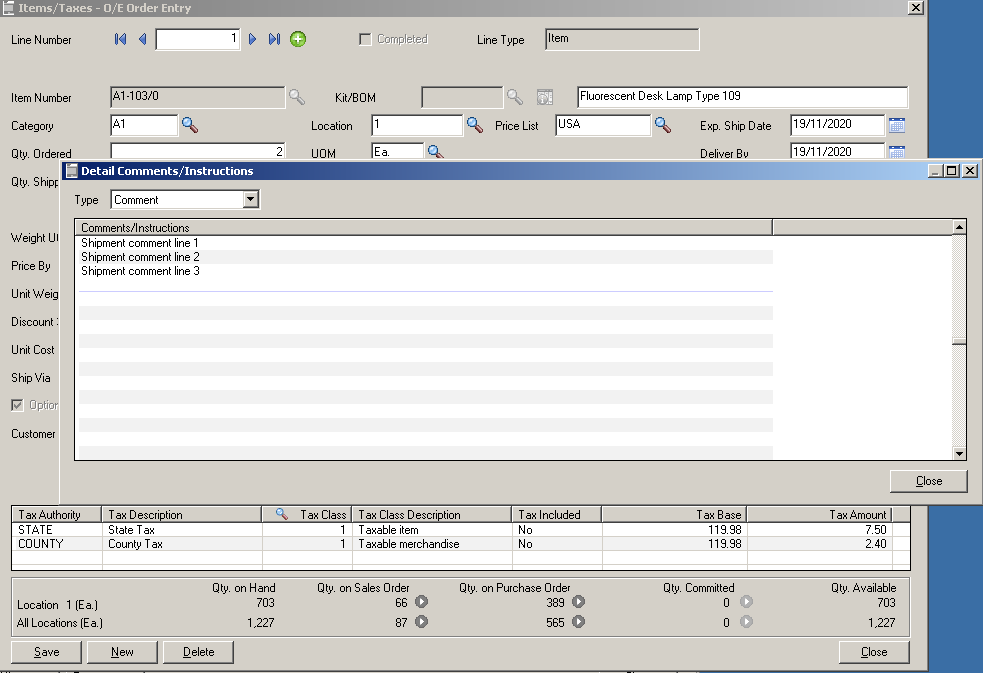
After entering a detail line, go to the details Comments/Instructions entry screen.

Enter the name of the Comments Template you wish to import into the order detail comments. The example below uses the Comments Template “SHIPPING”.



Press [TAB] or [ENTER] to insert the comment line with the template name.

The Extender script [COMMENTTEMPLATES.OECOINO] will trigger upon insert of a comment, and load the comment lines entered as part of the SHIPPING template’s setup.



When importing the template comment lines into the O/E order, the Extender script will take into account newlines and carriage returns, thus creating a new comment line when it encounters them.

This preserves the comment formatting as entered in the Edit Templates screen.