



# USING NOTES AND EXTENDER TO DISPLAY AR CREDIT STATUS, AR AGING AND OE BACKORDERS IN OE ORDER ENTRY SCREENS

## BUSINESS REQUIREMENT

Client wants to display some additional information when entering OE Shipments and OE Orders. They use Extender and Orchid Notes to display AR Aging, AR Credit Status and OE Backorders.

## KEY LEARNINGS

Using Extender to populate Notes on the fly.

Linked to the OE Order Entry screen, can be added to OE Shipment screen too.

## STEPS TO INSTALL

- Install and activate Extender Developer and Information Manager Notes.
- Import *Orchid Notes, AR and OE Details per customer* module
- Restart the Sage desktop
- Open the OE Screen. View the Notes
- To add to the OE Shipment screen, go to I/M Options > Notes/DML/Extender Tray and add records for OE2200 (same details as the ones for OE1100).

Requires Extender and Information Manager Notes latest PU

## RUN OE ORDER SCREEN

Go to Order Entry>O/E Transactions>Order entry

Second Shipment – Customer **1200**

- First box shows open sales orders for this customer (Extender & Notes). Double click on the blue “**ORD00....**” to drill into the order

## Extended Note for OE Screen example

- Second box shows the customer AR Aging (Extender & Notes). Double click on “**current**” or “**1**” etc to see documents making up the total (Extender & Notes). Double click on blue **Transaction Type** (e.g. Invoice or Credit note) to open AR Invoice.
- Third box shows the credit status.

The screenshot shows the ORCW01 - O/E Order Entry screen. The main window displays order details for Order No. 1200, Customer Mr. Ronald Black, and a list of items. The AR Aging - 1200 window is open, showing a table of aging data. The AR Credit Status - 1200 window is also open, showing a table of credit status data.

**Order Details:**

- Order No.: 1200
- Customer No.: 1200
- Mr. Ronald Black
- Status: Posted
- Entered By: ADMIN
- Template Code: ACTIVE
- Order Date: 15/01/2019
- Order Type: Active
- Ship-To Location: WAREHS
- Location: 4
- Port of San Francisco
- Deliver By: 15/01/2019
- Exp. Ship Date: 15/01/2019
- Ship Via: CCT
- Cross-Country Trucking Lines
- Tracking No.
- Reference: Ref 0901-1

**Items List:**

Un...	Type	Q	Item No. / Misc. Charge	Q	Kil/BOI	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	

**AR Aging - 1200**

From 1200	To	Amount Due
Current		-754.10
1	30	0.00
31	60	0.00
61	90	0.00
Over	90	4,919.70

**AR Credit Status - 1200**

Outstanding A/...	Amount
A/R Pending Ba...	126.65
O/E Pending Or...	948.96
Other Pending ...	0.00
Total Outstanding...	5,241.21
Credit Limit	0.00
Credit Limit Exc...	0.00