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Introduction

Welcome to eXtender, a simple yet powerful application development system for Microsoft Dynamics GP. eXtender is ideal for creating and maintaining fully integrated solutions for your Microsoft Dynamics GP system.

Before you put eXtender to work for you, take a few moments to review the information presented here. Understanding the organization can provide you with the proper approach to the eXtender documentation.

This introduction is divided into the following sections:

- What’s in this manual
- Symbols and Conventions
- What’s New
What’s in this manual

The eXtender Manual is designed to give you an in-depth understanding of how to use eXtender. The manual contains the following parts:

- **Part 1, Installation**, provides details of how to install eXtender and updating eXtender from previous versions.
- **Part 2, Using eXtender**, shows you how to start using eXtender.
- **Part 3, eXtender Concepts**, outlines the field types and terminology that are used throughout eXtender.
- **Part 4, Data Entry**, shows how to create data entry screens using eXtender.
- **Part 5, Data Entry Tools**, provides details for tools that can be used to enhance the data entry screens created with eXtender.
- **Part 6, Interfaces**, shows how to pass details from eXtender data entry screens to Microsoft Dynamics GP transactions.
- **Part 7, Automation**, shows how to set up eXtender automation features.
- **Part 8, Reporting**, shows how to create reports from eXtender data entry screens.
- **Part 9, Maintenance**, shows how to run maintenance routines in eXtender.
## Symbols and Conventions

This manual uses the following symbols to make specific types of information stand out.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Light Bulb" /></td>
<td>The light bulb indicates helpful tips, shortcuts and suggestions</td>
</tr>
<tr>
<td><img src="image.png" alt="Warning" /></td>
<td>The warning symbol indicates situations you should be aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Microsoft Dynamics GP may be affected.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 4, Data Entry</td>
<td>Bold type indicates a part name</td>
</tr>
<tr>
<td>Chapter 8, “Windows”</td>
<td>Quotation marks indicate a chapter name</td>
</tr>
<tr>
<td>EXTENDER.EXE</td>
<td>Words in uppercase indicate a file name</td>
</tr>
<tr>
<td>TAB OR CTRL+M</td>
<td>Small capital letters indicate a key or key sequence.</td>
</tr>
</tbody>
</table>
What’s New

What's New is your guide to enhancements in eXtender Enterprise version 10.0.

We add enhancements based on feedback we receive from customers. Your willingness to help us build better products makes this a more complete solution for small and medium-sized businesses, putting you in a better position to manage your organization successfully. We encourage you to share your thoughts and reactions with us at any time.

The new features in this version are:

- Detail Windows
- Window Groups
- Consolidation of Inquiry Windows
- Enter new name when copying objects
- Move/swap fields
- Label field type
- Account field type
- Integration with home pages
- Improved script entry interface
- Key fields displayed on notes windows
- Logic routines
Detail Windows

Detail windows allow you to create extra windows for existing Microsoft Dynamics GP forms that contain scrolling windows to store detail records. These windows can be opened from an Extras menu, using a Hot Key or automatically open after entering or exiting a field. Templates can be created for detail windows to aid in data entry.
Window Groups

Window Groups allow you to create a group of windows that open from a single Extras menu, hot key or field event. Conditions can be added to each window to determine which window/s are opened based on field values on the form that the window group is linked to.

For example, this feature can be used to enter different types of extra item information based on the item class, employee information based on job title, sales order line information based on the item number, or as in the example shown above, customer information based on the customer class.

An unlimited number of Windows, Notes, Detail Windows and Inquiries can be added to each Window Group.
Consolidation of Inquiry Windows

To simplify the eXtender user interface, Inquiries and Note Inquiries have been consolidated into one setup form. Detail Window Inquiries are also created from this single inquiry setup.
Enter new name when copying objects

In previous versions of eXtender, when you copied an eXtender object, the name of the duplicate object was the same as the original object. This caused confusion when copying windows and notes because there were now two Extras menu items with the same description. To alleviate this confusion, this version of eXtender allows you to enter the new name of the object as well as the new ID.
Move/swap fields

This feature allows users to move fields on an eXtender object to another location, even after data has already been entered. A field can be moved to a location that does not already have a field, or the position of two fields can be swapped.

Fields can be moved on the following eXtender objects:

- Windows
- Detail Windows
- Forms
- Detail Forms
- Linked Forms

As well as data being moved, eXtender objects that use the field moved is also updated. This includes:

- Inquiries
- Imports
- Navigation Lists
- Posting windows
- All Interfaces (Journals, Invoices, Vouchers, Sales Orders, Purchase Orders, Timesheets and Inventory)
- Processes
- Column Reports
- Email Merges
- Mail Merges
Label field type

The label field type allows you to create a label on your eXtender Data Entry objects. Labels can be used to separate and classify groups of fields on your window or form, leading to greater overall usability and clarity.
**Account field type**

The account field type allows you to enter an account number. When an account number is used on an eXtender Form, Detail Form or Linked Form, the accounts entered can be used to interface to:

- Sales Order Processing
- Receivables
- Payables
- General Ledger
- Inventory transactions

On each of these interface setup windows, there is a new button called Accounts. Clicking on this window opens the Account setup window for the interface, where you can select where each account for the interface will come from. You can select the account as:

- The default account for the transaction
- An account field on the Form
- Any account number in the chart of accounts
Integration with home pages

eXtender integrates with the new home page functionality in 2 ways:

- Adding quick links to eXtender objects
- Adding custom reminders based on eXtender SmartList objects

You can add a quick link on your home page to the following eXtender objects:

- Forms
- Linked Forms
- Detail Forms
- Navigation Lists
- Imports
- Processes
- Posting windows
- Report Groups

When you create a SmartList object based on an eXtender Form, Detail Form or Linked Form, you now also make this information available to create a custom reminder.
**Improved script entry interface**

The script entry interface has been improved to allow faster development of eXtender Logic scripts. A set of reference lists has been added to each script entry window to allow selection of a Microsoft Dynamics GP form, window, field, table, report, constant or message for any product in your .set file.
Key fields displayed on notes windows

To aid in easier identification of note data, and avoid confusion when multiple Notes windows are open, key fields have been added to the top of the Notes window in the same way that they were already available for Windows.
Logic routines

Logic routines allow the running of logic scripts based on:

- Opening a form
- Opening a window
- Entering a field
- Exiting a field
- Changing a field value
- Saving a new record in a table
- Updating an existing record in a table
- Deleting a record from a table
- Selecting an Extras menu item
- Entering a Hot Key combination
Part 1: Installation

This portion of the manual describes the installation and registration of eXtender.

The information is divided into the following chapters:

- Chapter 1, “Installing eXtender”, describes how to install, set up and register eXtender

- Chapter 2, “Updating eXtender”, describes the process of updating eXtender with new third party products
Chapter 1: Installing Extender

To install eXtender:

1. Run the setup executable, EXTENDER10.MSI, which will start the eXtender installation.

2. Click on the Next button to continue.

3. Select the location where your Microsoft Dynamics GP program is installed using the Browse button. Click on the Next button to continue.
4. Click on the Next button to begin the installation.

5. Click on the Finish button to complete the installation. Microsoft Dynamics GP will launch automatically.
6. Click on the Yes button to include the eXtender code into your Microsoft Dynamics GP workstation application. If you click on the No button, you will not be able to access the eXtender application.

After logging in to Microsoft Dynamics GP, you will need to run the setup routine to create tables.

To setup eXtender:

1. Click on the Add button at the top of the Shortcut bar. Select Other Window from the list of options to open the Add Window Shortcut window. 

2. Select eXtender, 3rd Party, Install eXtender from the Available Windows list.

3. Click on the Add button to add the shortcut to the Shortcut bar. Click on the Done button to close the Add Window Shortcut window.

4. Select the Install eXtender shortcut to open the Install eXtender window.
5. Click on the Install button.
6. If you are upgrading from a previous version of eXtender, click on the Update Tables button.
7. Click on the Finish button to complete the process.

To register eXtender:

1. Click on the Add button at the top of the Shortcut bar. Select Other Window from the list of options to open the Add Window Shortcut window.
2. Select eXtender, 3rd Party, Register eXtender from the Available Windows list.
3. Click on the Add button to add the shortcut to the Shortcut bar. Click on the Done button to close the Add Window Shortcut window.
4. Select the Register eXtender shortcut to open the Register eXtender window.

5. Select the edition of eXtender that you have purchased.
6. Enter your supplied Registration Key.
7. Click on the Save button.
Chapter 2: Updating eXtender

If you are upgrading eXtender from a previous version, you will need to update a few tables to avoid error messages from being displayed. To update eXtender, re-run the install routine following the instructions from the previous chapter.

If there are items missing from the product, form, window or table lists on the eXtender setup windows, mark the Refresh Cache checkbox before you run the install.
Part 2: Using eXtender

This portion of the manual describes how get started using eXtender.

The information is divided into the following chapters:

- **Chapter 3, “eXtender Interface”,** describes how to navigate using the main eXtender interface.

- **Chapter 4, “Security”,** describes assigning user and user group security to eXtender objects.

- **Chapter 5, “Import and Export”,** describes how to export eXtender setup details to an XML file and importing eXtender setup details from an XML file.
Chapter 3: eXtender Interface

This chapter describes how to use the eXtender resource explorer. The resource explorer is the primary point of navigation in eXtender. You will use it for virtually all tasks in eXtender.

Information about the eXtender interface is divided into the following sections:

- Displaying resources
- Adding new resources
- Opening existing resources
- Copying existing resources
- Printing resource lists
- Displaying more information about a resource
Displaying resources

The resource explorer is divided into two panels; the eXtender Objects list and the eXtender Resources list.

The eXtender Objects list displays all resource types. The eXtender Resources list displays all resources for the selected eXtender Object.

To display a list of resources:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select the object type from the eXtender Objects list
Adding new resources

Adding new resources is the first step in creating your eXtender application.

To add a new resource:

1. Select the object type from the eXtender Objects list
2. Click on the New button or enter CTRL+N
Opening existing resources

When you want to modify a resource, you will first need to open it.

To open an existing resource:

1. Select the object type from the eXtender Objects list
2. Select the resource that you want to open from the eXtender Resources list
3. Click on the Open button or enter CTRL+O
Copying existing resources

If you want to create an exact duplicate of a resource that has been previously created, you can use the copy feature of eXtender.

To copy an existing resource:

1. Select the object type from the eXtender Objects list
2. Select the resource that you want to copy from the eXtender Resources list
3. Click on the Copy button
4. Enter the new resource ID and resource name in the Duplicate Resource window

5. Click on the OK button
Printing resource lists

You can use the Print button to print information about the resources that are currently displayed in the resource list.

To print a list of resources:

1. Select the object type from the eXtender Objects list
2. Click on the Print button or enter CTRL+P
Displaying more information about a resource

The resource list shows information relating to the selected eXtender object. The More Information window shows details of the creation and last modification of the resource.

To display more information about a resource:

1. Select the object type from the eXtender Objects list
2. Select the resource that you want more information about
3. Click on the More Info button or enter CTRL+M
Chapter 4: Security

This chapter describes how to set security for Microsoft Dynamics GP users to eXtender resources.

This information is divided into the following sections:

- Creating Security Tasks
- Creating Security Roles
- Setting individual user security
- Security Template Download
Creating Security Tasks

The eXtender security in version 10.0 has been rolled into the GP Dynamics security setup. In order to assign security, you need to define security tasks, add those to security roles, and then assign security roles to individual users or user classes.

Security tasks contain the windows, reports, and other resources that users need to access to complete tasks in eXtender. The first step in setting up security is to create security tasks. Refer to “Creating security tasks” in Chapter 6 of the Microsoft Dynamics GP System Setup Guide for more information on creating Security Tasks.

1. Open the Security window (Tools >> Setup >> System >> Security Tasks)
2. Type in a Task ID, Task Name, and Task Description.
3. Select a Category from the drop down list.
4. Select Extender as the Product
5. Select Extender Resources as the Type
6. Select the particular resource you want to grant access to as the Series
7. Mark the resources that you want to grant access to
8. Unmark the resources that you want to revoke access to
Creating Security Roles.

Security roles contain one or more Security Tasks. A role is created and then assigned to a user in order to provide them access to a group of Security Tasks in eXtender. All your Security Tasks should be created before starting to create your Security Roles. Refer to “Creating security roles” in Chapter 6 of the Microsoft Dynamics GP System Setup Guide for more information on creating Security Roles.

1. Open the Security window (Tools >> Setup >> System >> Security Roles)
2. Type in a Role ID, Role Name, and Role Description.
3. Check off the Tasks that you wish to assign to this Role.
Setting Individual User Security

After creating Security Roles, the last step is to add Security Roles to Individual users. Your Security Roles need to be setup before you can assign them to individual users. Refer to “Setting up individual user security” in Chapter 6 of the Microsoft Dynamics GP System Setup Guide for more information on setting user security.
Security Template Download

A sample eXtender security role has been created and made available on the eOne website. Normally on a new installation, only the SA user has rights to get into eXtender, and create new eXtender objects. You can manually create a security role, but the sample security role can help you get a start on setting up security. The role is named “eXtender Power User” and creates a security role that has full rights to everything in eXtender. There are several security tasks within the power user role. Refer to the documentation that comes with the download package for creating the power user role.
Chapter 5: Import and Export

eXtender resources can be exported to an XML file to easily transfer resource definitions between Microsoft Dynamics GP companies and to distribute eXtender applications to multiple Microsoft Dynamics GP sites.

This information is divided into the following sections:

- Exporting eXtender resources
- Importing eXtender resources
Exporting eXtender resources

Use the Export window to export eXtender resources to an XML file. All data previously in the file will be overwritten.

To export resources:

1. Open the eXtender Export window (Tools >> eXtender >> Export)

2. Enter the File Name
3. Select the Export Method
4. Mark the eXtender resources that you want to export
5. Click on the Save button
Importing eXtender resources

Use the Import window to import eXtender resources from an XML file.

To import resources:

1. Open the eXtender Import window (Tools >> eXtender >> Import)
2. Select Extras >> Tools >> Import to open the Import window
3. Enter the File Name that you want to import
4. If you want to overwrite existing eXtender objects with the ones contained in the file, mark the ‘Overwrite existing records’ checkbox.
5. Click on the Import button.
Part 3: eXtender Concepts

This portion of the manual describes the field types and terminology that are used throughout eXtender.

The information is divided into the following chapters:

- **Chapter 6, “Field Types”,** describes how to set up and use fields in eXtender
- **Chapter 7, “Terminology”,** describes terminology that is used by eXtender
Chapter 6: Field Types

This chapter describes the field types that are available in eXtender and how each field type can be applied.

This information is divided into the following sections:

- Short String
- Long String
- Checkbox
- Date
- Time
- Phone Number
- Email
- File
- Folder
- Number
- Currency
- Quantity
- Percentage
- Lookup
- Linked Lookup
- List
- Account
- Label
- Calculated Field
Short String

A short string field allows for up to 30 characters to be entered. When creating a short string field, you may want to restrict the types of strings that can be entered. You can do this by selecting a string format for the field. There are 5 formats that can be applied to a short string:

- No format – all characters are accepted (default)
- Numeric Only – when selected, only numeric characters (0-9) characters are accepted
- Uppercase Only – when selected, all alphabetic characters are displayed in uppercase
- Alphanumeric Only – when selected, only letters and numbers can be entered
- Alphanumeric Uppercase Only – when selected, only letters and numbers can be entered, and all alphabetic characters are displayed in uppercase

You can also apply a mask to a short string. A mask is used to add static characters to a string, such as parentheses, spaces or dashes. A capital X is used as a placeholder to represent alphanumeric characters that will appear in the string. All other characters will be used to change the way the string is displayed after it has been entered. For example:

<table>
<thead>
<tr>
<th>Mask String</th>
<th>Data Entered</th>
<th>Data Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXX-XXXX-XX</td>
<td>123456789</td>
<td>123-4567-89</td>
</tr>
<tr>
<td>q: XXX (X)</td>
<td>ABCD</td>
<td>q: ABC (D)</td>
</tr>
</tbody>
</table>

If you are not using a string mask, you can select the maximum number of characters that can be entered into the string field. The maximum number of characters will default to 30 if not selected.

To select string settings:

1. Click on the expansion button

[Image of String Settings dialog box]
2. Select the String Format
3. If you want to use a string mask, mark the Use String checkbox and enter the String Mask
4. If you do not want to use a mask, select the maximum number of characters
Long String

A long string field allows for up to 255 characters to be entered.

When you add a long string to the first column of the main window of a form, linked form or detail form, you cannot add a field to the second column of the same row because the field takes up both rows. If you have a field already in the second row, it will be cleared. You cannot add a long string to the second column of a form, linked form or detail form.
Checkbox

A checkbox field is used to record a true/false value. Mark the checkbox to indicate true and unmark the checkbox to indicate false.
Date

A date field allows entry and validation of a date value.
Time

A time field allows entry and validation of a time value in a 24-hour format.
Phone Number

A phone number field allows for entry of a phone number formatted in your chosen Microsoft Dynamics GP phone number format.
Email

An email field allows entry of an email address. When an email field is added to an eXtender resource, you can use this field to send emails. You can enter up to 255 characters in this field.

To send an email from an email field:

1. Click on the Email field prompt

2. Enter the email Subject.
3. Enter the email body.
4. Click on the Attachment button, enter a filename, and click on the OK button if you want to add an attachment.

5. Click on the Send button.

When you add an email to the first column of the main window of a form, linked form or detail form, you cannot add a field to the second column of the same row because the field takes up both rows. If you have a field already in the second row, it will be cleared. You cannot add an email to the second column of a form, linked form or detail form.
File

A file field is used to enter file locations. When a file field is added to an eXtender resource, you can use this field to open the file. To open the file, simply click on the File field prompt. The file will be opened using the default application associated with the file extension. You can enter up to 255 characters in this field.

When you add a file to the first column of the main window of a form, linked form or detail form, you cannot add a field to the second column of the same row because the field takes up both rows. If you have a field already in the second row, it will be cleared. You cannot add a file to the second column of a form, linked form or detail form.
Folder

A folder field is used to enter folder locations. When a folder field is added to an eXtender resource, you can use this field to open the folder using Windows Explorer. To open a folder, simply click on the Folder field prompt. If you enter a web address in a folder field, the site will be opened using your default web browser. You can enter up to 255 characters in this field.

When you add a folder to the first column of the main window of a form, linked form or detail form, you cannot add a field to the second column of the same row because the field takes up both rows. If you have a field already in the second row, it will be cleared. You cannot add a folder to the second column of a form, linked form or detail form.
Number

A number field is used to enter numbers with no decimal places. You can enter any number between -1,410,065,407 and 1,410,065,407.
Currency

A currency field is used to enter currency amounts. You can select the number of decimal places for a currency field as a number between 0 and 5. You can enter any currency amount from -$999,999,999,999.99 to $999,999,999,999.99.

To set currency options:

1. Click on the expansion button.

2. Select the number of decimal places.

3. Click on the Save button.

If Multicurrency Management is registered, currency fields can be displayed in functional and originating currencies. See Chapter 16, “Multicurrency”, for more details of how to set up multicurrency for a form, linked form or detail form.
Quantity

A quantity field is used to enter quantity amounts. You can select the number of decimal places for a quantity field as a number between 0 and 5. You can enter any quantity between -99,999,999,999.99 and 99,999,999,999.99.

To set quantity options:

1. Click on the expansion button.

2. Select the number of decimal places.

3. Click on the Save button.
Percentage

A percentage field is used to enter percentage amounts. You can select the number of decimal places for a percentage field as a number between 0 and 5. You can enter any number between -999.99% and 999.99%.

To set percentage options:

1. Click on the expansion button.

2. Select the number of decimal places.

3. Click on the Save button.
A lookup field provides a lookup button to open a lookup window to choose values from existing information. The standard lookups that are available are Customer, Vendor, Item, User, Employee, Department, Position, Company, Paycode, Tax Schedule, Salesperson, Site, Sales Territory, User Class, Item Class, Customer Class, Employee Class and Prospect.

To set lookup options:

1. Click on the expansion button.
2. Select the Lookup.
3. Click on the Save button.

When you add a lookup to the first column of a form, linked form or detail form, the description for the lookup will only be displayed if there is not a field in the second column of the same row. If you want to display the lookup description in another location, you can do this using a calculated field.

Lookups can also be created from eXtender Forms and eXtender Detail Forms. Restrictions can be added for these lookups.

To add lookup restrictions:

1. Click on the Restrictions button to open the Lookup Restrictions window. This button will only be available if the lookup is based on a form or a detail form.
2. Click on the Add button above the Restrictions list to open the Add Restriction window.

3. Select the field to base the restriction on.
4. Select the restriction type. You can select from Equals, Does Not Equal, Greater Than, Greater Than Or Equal To, Less Than and Less Than Or Equal To.
5. Select where the restriction value is from. You can select Constant or Field.
6. If the restriction value is from a constant, enter or select the constant value. If the restriction value is from a field, select the field on the current data entry resource to pass to the restriction.
7. Click on the Save button.

To edit an existing restriction

1. Select the restriction that you want to edit from the Restrictions list.
2. Click on the Edit button above the Restrictions list.
3. Enter the new values for the restriction.
4. Click on the Save button

To remove a restriction

1. Select the restriction that you want to edit from the Restrictions list.
2. Click on the Subtract button above the Restrictions list.
**Linked Lookup**

A linked lookup allows you select a lookup that is related to another lookup. The linked lookups that are available are Customer Addresses, Vendor Addresses, Vendor Items and Item Units of Measure.

To set linked lookup options:

1. Click on the expansion button.

![Linked Lookup Settings](image)

2. Select the Lookup Field to link to.
3. Select the Linked Lookup.
4. Click on the Save button.

*When you add a linked lookup to the first column of a form, linked form or detail form, the description for the linked lookup will only be displayed if there is not a field in the second column of the same row. If you want to display the linked lookup description in another location, you can do this using a calculated field.*
List

A list field provides a drop down list of values. You can use the List Field Settings window to add list items and set the sort order.

To set list options:

1. Click on the expansion button.

2. Enter List Values.
3. Mark the Sort List option if you want your list to be sorted alphabetically.
4. Click on the Save button.

If you have other lists on your eXtender resource, you can copy the list items from these lists to a new list.

To copy an existing list:

1. Click on the Copy button above the List Values list. This button will only be visible if there are other lists to be copied.
2. Select the list that you want to copy.
Account

An account field allows entry of an account number. A lookup button is provided to select an account from the chart of accounts.
Label

A label is used to create a label on the form or window without a field.
Calculated Field

A calculated field allows the entry of a formula. There are 5 types of calculated field that can be created: long string, number, currency, quantity and percentage.

To add a calculated field:

1. Click on the expansion button or calculation button. The expansion button is used on data entry maintenance windows and the calculation button is used on interface maintenance windows.

2. Select the field type. If you have selected currency, percentage or quantity, select the number of decimal places.

3. Add fields, functions and constants to build the calculation.

4. Add conditions.

5. Click on the Save button.

If Multicurrency Management is registered, calculated fields with a field type of currency can be displayed in functional and originating currencies. You do not have to create 2 calculations. The functional currency is calculated by applying the exchange rate to the result of the originating calculation. See Chapter 16, “Multicurrency”, for more details of how to set up multicurrency for a form, linked form or detail form.

To add an eXtender field to a calculated field:

1. Move the cursor in the Calculation to the point where you want to add the eXtender field.
2. Select the eXtender field you want to add to the calculation from the fields list.
3. Click on the Insert button above the fields list.

To add a function to a calculated field:

1. Move the cursor in the Calculation to the point where you want to add the function
2. Select the function you want to add to the calculation from the fields list.
3. Click on the Insert button above the fields list.

To add a constant to a calculated field:

1. Move the cursor in the Calculation to the point where you want to add the constant
2. Click on the Insert button above the Calculation.
3. Enter the constant value.
4. Click on the Save button.

To remove components from a calculated field:

1. Select the components you want to remove from the Calculation
2. Click on the Remove button

You can copy the setup of a calculated field from other calculated fields. This is especially useful when you have a complex calculation that is performed in more than one place in your eXtender application.

To copy an existing calculated field:

1. Select Options >> Copy Calculated Field to open the Copy Calculated Field dialog.
2. Select the Calculation from the list of calculations.
3. Click on the Select button.

Conditions allow for the creation of if-then scenarios in your calculated field. When the calculated is used, each condition is evaluated to check if it is true. If a condition is found to be true, the calculation for that condition is used. If no conditions are found to be true, the default calculation is used.

To add a condition to a calculated field:

1. Click on the Add button above the Conditions list

2. Select the restriction Field.
3. Select the restriction type.
4. Select the comparison type.
5. Select the comparison value.
6. Repeat steps 2 to 5 for the remaining 3 restrictions as necessary.
7. Click on the Add button.

To remove a condition from a calculated field:

1. Select the condition from the Conditions list
2. Click on the Remove button above the Conditions list.

Clearing a calculation removes a single calculation. If you have more than one condition in a calculation, only the currently selected condition is removed.

To clear a calculation:

1. Select the calculation that you want to clear.
2. Click on the Clear button above the Calculation.

Removing a calculated field removes all calculations. You may need to do this to recreate a calculated field after you have made changes to the eXtender resource.

To remove a calculated field:

1. Click on the Delete button at the bottom left of the Edit Calculated Field window.
Chapter 7: Terminology

This chapter describes the terminology that is used throughout this manual and throughout eXtender.

Products

A product is an item in the Microsoft Dynamics GP launch file.

Series

A series is a group used to organize resources.

Forms

A form is a collection of related data entry screens.

Windows

A window is a single data entry screen.

Key Fields

Key fields are used to assign a unique identifier from a Microsoft Dynamics GP window to an eXtender record. For example, for the Customer Maintenance form, the Key Field is the Customer Number. There can be one or more key fields assigned to create a unique identifier. For example, on the Customer Address Maintenance, the key fields would be the combination of Customer Number and Address ID.

Hot Keys

A Hot Key is a keyboard shortcut used to quickly access functionality.
Part 4: Data Entry

This portion of the manual describes the features of eXtender that can be used to create new data entry objects. With eXtender, you can attach new data entry windows to existing Microsoft Dynamics GP windows, create new data entry forms and attach notes windows to an existing Microsoft Dynamics GP window.

The information is divided into the following chapters:

- **Chapter 8, “Windows”,** describes how to attach a new window to an existing Microsoft Dynamics GP form.
- **Chapter 9, “Notes”,** describes how to attach a new detailed notes window to an existing Microsoft Dynamics GP form.
- **Chapter 10, “Detail Windows”,** describes how to attach a new window with detail lines to an existing Microsoft Dynamics GP form.
- **Chapter 11, “Inquiries”,** describes how to attach a new inquiry window to an existing Microsoft Dynamics GP form.
- **Chapter 12, “Window Groups”,** describes how to create a group of windows.
- **Chapter 13, “Forms”,** describes how to create a new standalone data entry form.
- **Chapter 14, “Linked Forms”,** describes how to create a new standalone data entry form that is linked to another Microsoft Dynamics GP or eXtender form.
- **Chapter 15, “Detail Forms”,** describes how to create a new standalone data entry form with a header and detail line items.
- **Chapter 16, “Logic”,** explains how to add logic to a window, form, linked form or detail form.
- **Chapter 17, “Multicurrency”,** describes how to use multicurrency features with forms, linked forms and detail forms.
Chapter 8: Windows

This chapter will guide you through the creation of an eXtender Window. eXtender Windows are used to link new data to existing Microsoft Dynamics GP windows. You should use an eXtender Window when an existing Microsoft Dynamics GP window does not contain all of the data that you need to track.

This information is divided into the following sections:

- Adding a new Window
- Using Windows
- Modifying an existing Window
- Setting Window options
- Adding Window fields to SmartList
- Creating Window templates
- Setting Window template options
- Using Window templates
- Removing Windows
Adding a new Window

Use the eXtender Windows window to define new Windows.

To add a new Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Windows from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Window.
5. Select the Product, Series, Form and Window to link the eXtender Window to.
6. Click on the Add button above the Key Fields list to select a key field. Repeat this step until all key fields have been selected.
7. Enter prompts and select field types for fields 1 to 15.
   For more information on each field type, see Chapter 6, "Field Types".
8. Click on the Save button.
   
You can add more than one window to a single Microsoft Dynamics GP form. When you click Save, the new window will be immediately available as an Extras menu item from the selected Microsoft Dynamics GP window.
You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll window and the SOP Number from the Sales Transaction Entry window to create a complete key field.

To add a key field:

1. Click on the Add button above the Key Fields list to open the Field Lookup window.

2. Select the window that contains the key field from the window button above the Window Fields list.
3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.

4. Click on the Select button to add the selected field to the key fields for the eXtender Window.
Using Windows

As soon as an eXtender Window is saved, the new window fields will be available via the Extras menu on the Form that the window has been linked to. The user interface of this window is the same as any other window Microsoft Dynamics GP window.

To enter data into an eXtender Window:

1. Open the Microsoft Dynamics GP form that the eXtender window has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.

If none of the key fields have been entered, you will receive the error message “Not all required fields have been entered”

3. Select the eXtender Window from the Extras menu or enter the Hot Key for the Window.
4. Enter values for each eXtender Window field.
5. Click on the Save button.
Modifying an existing Window

You can make changes to a Window using the eXtender Windows window.

To modify an existing Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Windows from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Window
5. Click on the Save button
Setting Window options

Use the eXtender Windows Options window to set required fields, assign a hot key and set auto open and close options for the eXtender Window.

To set required fields for a Window:

1. Click on the Options button
2. Mark the fields that you want to be required
3. Click on the Save button

To set a Hot Key for a Window:

1. Click on the Options button
2. Mark the Allow Hot Key option
3. Select the Hot Key from the Hot Key list
4. Click on the Save button

Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. If the main window that you have selected to link to is a scrolling window, you can also choose to automatically open when a line is added or modified.

To enable this option, mark the Auto Open option and select a field and open method. You can also set the window to automatically close when you leave the last field on the eXtender Window.

To set Auto Open and Auto Close options:

1. Click on the Options button.
2. Mark the Auto Open option.
3. Select the Open Method. You cannot select Line Change as the Open Method if the window selected is not a scrolling window.
4. If you have not selected Line Change as the Open Method, select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.
5. Click on the Save button.
Adding Window fields to SmartList

Use the SmartList Integrations window to add your eXtender Window fields into an existing SmartList.

To add Window fields to a SmartList:

1. Click on the SmartList button.
2. Click on the Add button above the SmartList Integrations list.
3. Click on the Add button above the SmartList Integrations list.
4. Select the SmartList Product and SmartList Object.
5. Match the eXtender Window Key Fields to the SmartList fields.
6. Click on the Save button.
You can add a window to more than one SmartList.

To remove Window fields from a SmartList:

1. Click on the SmartList button.
2. Select the SmartList from the SmartList Integrations list.
3. Click on the Remove button above the SmartList Integrations list.
Creating Window templates

Use the Templates window to add new Window templates.

A Window template is a set of default values for fields on the Window. They can be used to enter data more quickly by automatically assigning values.

To create a new Window template:

1. Click on the Templates button

2. Click on the Add button above the Templates list
3. Enter an ID and Description for the template
4. Select the field that the template will End Focus On
5. Select the default replacement option
6. Add fields to the template

To add a field to the template:

1. Click on the Add button above the Fields list

![Add Template Field](image)

2. Select the field that you want to default
3. Select the Field Value
4. Select the Replacement option
5. Click on the Save button
Setting Window template options

Use the Templates window to select the template selection method and the default template. The default template will be automatically applied when a window is opened that has not had any data entry performed on it.

To set Window template options:

1. Click on the Templates button.

![Templates window](image)

2. Select the Selection Method.
3. Mark the 'Use template to enter default values' checkbox. Enter the Default Template.
4. Click on the Save button.
Using Window templates

How you use templates depends on the template Selection Method. There are 3 selection methods, Button, Menu and Prompt.

- If the Button selection method is chosen, there will be a template button available on your Window. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will popup prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the eXtender Window
2. Click on the Templates button
3. Select the Template from the list

To select a template (Menu Selection Method):

1. Open the eXtender Window
2. Select the template from the Templates menu

To select a template (Prompt Selection Method):

1. Open the eXtender Window
2. Select the template from the Template Selection popup window

You can reopen the Select Templates window by selecting Select Template from the Templates menu or entering CTRL+T
Removing Windows

If you don't need a Window, you can remove it using the eXtender Windows window. If you have already entered data for the window, the data will also be deleted.

To remove a Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Windows from the eXtender Objects list.
3. Select the Window that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button.
Chapter 9: Notes

This chapter will guide you through the creation of an eXtender Note. Unlike the standard Microsoft Dynamics GP note window, which only allows you to enter a single note, an eXtender Notes window allows you attach multiple notes to a Microsoft Dynamics GP window. Each note entered in an eXtender Notes window automatically records the date and time the note was entered as well as the user that entered the note.

This information is divided into the following sections:

- Adding a new Notes window
- Using Notes windows
- Modifying an existing Notes window
- Removing Notes windows
Adding a new Notes window

Use the eXtender Notes window to define new Notes.

To add a new Notes window:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Notes from the eXtender Objects list.
3. Click on the New button or enter \texttt{CTRL+N}.
4. Enter an ID and Description for the Notes window.
5. Select the Product, Series, Form and Window to link the eXtender Notes window to.
6. Click on the Add button above the Key Fields list to select a key field. Repeat this step until all key fields have been selected.
7. Select a Hot Key from the Hot Key list.
8. Click on the Save button.

You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking detail notes to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line Scroll window and the SOP Number from the Sales Transaction Entry window to create a complete key field.

To add a key field:

1. Click on the Add button above the Key Fields list to open the Field Lookup window.
2. Select the window that contains the key field from the window button above the Window Fields list.

3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.

4. Click on the Select button to add the selected field to the key fields for the eXtender Window.
Note Types

You can define Note Types to classify the detail notes into groups for analysis.

To set note types:

1. Click on the Note Types button to open the Note Types window.

2. Enter the descriptions of the note types into the scrolling window.

3. Click on the OK button.
Using Notes windows

To open a Notes window:

1. Open the Microsoft Dynamics GP form that the eXtender Note has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.

If none of the key fields have been entered, you will receive the error message “Not all required fields have been entered”

3. Select the eXtender Note from the Extras menu or enter the Hot Key for the Notes window.

To add a note:

1. Open the Notes window
2. Click on the Add button above the Notes list
3. If note types have been set up for the note, select the note type.
4. Enter the note text
5. Click on the Save button

To edit an existing note:

1. Open the Notes window
2. Select the note you want to edit from the Notes list
3. Click on the Edit button above the Notes list
4. Enter the new note text
5. Click on the Save button

To remove a note:

1. Open the Notes window
2. Select the note you want to remove from the Notes list
3. Click on the Remove button above the Notes list

To print a Notes list:

1. Open the Notes window
2. Click on the Print button or enter `CTRL+P`

To export a Notes list to Excel:

1. Open the Notes window
2. Click on the Excel button
Modifying an existing Notes window

You can make changes to a Notes window using the eXtender Notes window.

To modify an existing Notes window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Notes from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Notes window
5. Click on the Save button
Removing Notes windows

If you don't need a Note, you can remove it using the eXtender Notes window. If you have already entered notes for the window, the notes will also be deleted.

To remove a Notes window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Notes from the eXtender Objects list.
3. Select the Note that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button
Chapter 10: Detail Windows

This chapter will guide you through the creation of an eXtender Detail Window. eXtender Detail Windows are used to link new detail records to existing Microsoft Dynamics GP windows.

This information is divided into the following sections:

- Adding a new Detail Window
- Using Detail Windows
- Modifying an existing Detail Window
- Setting Detail Window options
- Creating Detail Window templates
- Setting Detail Window template options
- Using Detail Window templates
- Removing Detail Windows
Adding a new Detail Window

Use the eXtender Detail Windows window to define new Detail Windows.

To add a new Detail Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Windows from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Window.
5. Select the Product, Series, Form and Window to link the eXtender Detail Window to.
6. Click on the Add button above the Key Fields list to select a key field. Repeat this step until all key fields have been selected.
7. Enter prompts, select field types and select the first or second row for each field in the detail window.
   For more information on each field type, see Chapter 6, “Field Types”.
8. Click on the Save button.

You can add more than one detail window to a single Microsoft Dynamics GP form. When you click Save, the new detail window will be immediately available as an Extras menu item from the selected Microsoft Dynamics GP window.

You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales
Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll window and the SOP Number from the Sales Transaction Entry window to create a complete key field.

To add a key field:

1. Click on the Add button above the Key Fields list to open the Field Lookup window.

2. Select the window that contains the key field from the window button above the Window Fields list.

3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.

4. Click on the Select button to add the selected field to the key fields for the eXtender Detail Window.
Using Detail Windows

As soon as an eXtender Detail Window is saved, the new window fields will be available via the Extras menu on the Form that the detail window has been linked to. The user interface of this window is the same as any other Microsoft Dynamics GP window.

To enter data into an eXtender Detail Window:

1. Open the Microsoft Dynamics GP form that the eXtender Detail Window has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.

If none of the key fields have been entered, you will receive the error message “Not all required fields have been entered”

3. Select the eXtender Detail Window from the Extras menu or enter the Hot Key for the Window.

4. Enter lines of values for each eXtender Detail Window field.
5. Click on the Save button.
Modifying an existing Detail Window

You can make changes to a Detail Window using the eXtender Detail Windows window.

To modify an existing Detail Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Windows from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Detail Window
5. Click on the Save button
Setting Detail Window options

Use the eXtender Detail Windows Options window to assign a hot key, set auto open options and select a field to be totaled for the eXtender Detail Window.

To assign a hot key:

1. Click on the Options button.
2. Mark the Allow Hot Key checkbox.
3. Select the Hot Key.
4. Click on the Save button.

Detail Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. If the main window that you have selected to link to is a scrolling window, you can also choose to automatically open when a line is added or modified.

To set Auto Open options:

1. Click on the Options button.
2. Mark the Auto Open option.
3. Select the Open Method. You cannot select Line Change as the Open Method if the window selected is not a scrolling window.
4. If you have not selected Line Change as the Open Method, select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.
5. Click on the Save button.
To select a field to be totaled:

1. Click on the Options button.

2. Mark the Show Total checkbox. This checkbox will only be enabled if there are numeric (Number, Currency, Percentage and Quantity) fields on the window.

3. Select the field that you want to be totaled.

4. Click on the Save button.
Creating Detail Window templates

Use the Templates window to add new Detail Window templates.

A Detail Window template is a set of default values for lines on the Detail Window. They can be used to enter data more quickly by automatically assigning values.

To create a new Detail Window template:

1. Click on the Templates button.

2. Click on the Add button above the Templates list.

3. Enter an ID and Description for the template.
4. Add lines to the template.
5. Add fields for each line of the template.
6. Click on the Save button.

To add a line to the template:

1. Click on the Add button above the Line Items list.
2. Add fields for the line item.
3. Click on the OK button.

To add a field to a template line:

1. Select the line that you want to add a field to from the List Items list. Click on the Edit button. To open the
2. Click on the Add button above the Detail Fields list.
3. Select the field that you want to default.
4. Select the Field Value.
5. Click on the Save button.
Setting Detail Window template options

Use the Templates window to select the template selection method and the default template. The default template will be automatically applied when a detail window is opened and has not had any data entry performed on it.

To set Detail Window template options:

1. Click on the Templates button.

2. Select the Selection Method.
3. Mark the 'Use template to enter default values' checkbox. Enter the Default Template.
4. Click on the Save button.
Using Detail Window templates

How you use templates depends on the template Selection Method. There are 3 selection methods, Button, Menu and Prompt.

- If the Button selection method is chosen, there will be a template button available on your Detail Window. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will popup prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the eXtender Detail Window
2. Click on the Templates button
3. Select the Template from the list

To select a template (Menu Selection Method):

1. Open the eXtender Detail Window
2. Select the template from the Templates menu

To select a template (Prompt Selection Method):

1. Open the eXtender Detail Window
2. Select the template from the Template Selection popup window

You can reopen the Select Templates window by selecting Select Template from the Templates menu or entering CTRL+T
Removing Detail Windows

If you don’t need a Detail Window, you can remove it using the eXtender Detail Windows window. If you have already entered data for the Detail Window, the data will also be deleted.

To remove a Detail Window:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Windows from the eXtender Objects list.
3. Select the Detail Window that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button.
Chapter 11: Inquiries

This chapter will guide you through the creation of an eXtender Inquiry. An eXtender Inquiry is used to display data entered on an eXtender Window, Note or Detail Window from another Microsoft Dynamics GP form. You should use an eXtender Inquiry when you have attached an eXtender Window, Note or Detail Window to a Microsoft Dynamics GP form and want to be able to view or edit the information entered on another Microsoft Dynamics GP form.

This information is divided into the following sections:

- Adding a new Inquiry
- Modifying an existing Inquiry
- Setting Inquiry options
- Removing Inquiries
Adding a new Inquiry

Use the eXtender Inquiries window to define new Inquiries.

To add a new Inquiry:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Inquiries from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.

4. Select the Window Type for the Inquiry. This can be Window, Note or Detail Window.
5. Enter an ID and Description for the Inquiry.
6. Enter the Window ID for the eXtender Window, Note or Detail Window to base the Inquiry upon.
7. Select the Product, Series, Form and Window to link the eXtender Inquiry to.
Modifying an existing Inquiry

You can make changes to an Inquiry using the eXtender Inquiries window.

To modify an existing Inquiry:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Inquiries from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O.
4. Enter new information for the Inquiry.
5. Click on the Save button.
Setting Inquiry options

Use the Options window to select the hot key for the Inquiry, set the Inquiry as Read Only and alternate keys for the Inquiry.

To set a Hot Key for an Inquiry:

1. Click on the Options button

2. Mark the Allow Hot Key option
3. Select the Hot Key from the Hot Key list
4. Click on the Save button

To set the Inquiry as read only:

1. Click on the Options button

2. Mark the Read Only option
3. Click on the Save button

By default, the eXtender Inquiry uses the same key fields as the eXtender Window that is based on. In some cases, these fields will not exist on the Microsoft Dynamics GP window that you have selected. When this occurs, you will need to assign alternate key fields for the Inquiry to be used instead of the default key fields.
To set an alternate key for the Inquiry:

1. Click on the Options button

![Options dialog box]

2. Mark the Use Alternate Key option
3. Click on the Add button above the Key Fields list to select a key field. Repeat this step until all key fields have been selected.
4. Click on the Save button
Removing Inquiries

If you don’t need an Inquiry, you can remove it using the eXtender Inquiries window. No data will be deleted when you remove an Inquiry.

To remove an Inquiry:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Inquiries from the eXtender Objects list.
3. Select the Inquiry that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button
Chapter 12: Window Groups

This chapter will guide you through the creation of a new eXtender Window Group.

This information is divided into the following sections:

- Adding a new Window Group
- Adding windows to a Window Group
- Setting Window Group options
- Modifying an existing Window Group
- Removing a Window Group
Adding a new Window Group

You can use the Window Group Maintenance window to create new Window Groups.

To add a Window Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Windows from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Window.
5. Select the Product, Series, Form and Window for the Window Group.
7. Click on the Save button.
Adding windows to a Window Group

A window group is made up of one or more windows. The windows that can be added to a Window Group are Windows, Detail Windows, Notes and Inquiries. Conditions can be added to each window to specify when each window will be opened.

To add a window to a window group:

1. Click on the Add button above the Windows list.
2. Select the windows that you want to add to the group. You can select more than one window at a time.
3. Click on the Add button.

To remove a window from a group:

1. Select the window that you want to remove from the Windows list.
2. Click on the subtract button above the Windows list.

To add conditions for a window:

1. Select the window that you want to add a condition to from the Windows list.
2. Click on the Add button above the Conditions list.
3. Select the Window and Field to base the condition on.
4. Select the Restriction type.
5. Enter the value for the restriction.
6. Click on the Save button.

To modify an existing condition:

1. Select the window that contains the condition that you want to modify.
2. Select the condition that you want to modify from the Conditions list.
3. Click on the Edit button above the Conditions list.
4. Enter the new information for the condition.
5. Click on the Save button.

To remove a window from a group:

1. Select the window that contains the condition that you want to modify.
2. Select the condition that you want to remove from the Conditions list.
3. Click on the subtract button above the Conditions list.
Setting Window Group options

Use the eXtender Window Groups Options window to assign a hot key and set auto open options for the eXtender Window Group.

To set a Hot Key for a Window:

1. Click on the Options button
2. Mark the Allow Hot Key option
3. Select the Hot Key from the Hot Key list
4. Click on the Save button

Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. If the main window that you have selected to link to is a scrolling window, you can also choose to automatically open when a line is added or modified.

To set Auto Open options:

1. Click on the Options button.
2. Mark the Auto Open option.
3. Select the Open Method. You cannot select Line Change as the Open Method if the window selected is not a scrolling window.
4. If you have not selected Line Change as the Open Method, select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.
5. Click on the Save button.
Modifying an existing Window Group

You can make changes to a Window Group using the eXtender Window Groups window.

To modify an existing Window Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Window Groups from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O.
4. Enter new information for the Window Group.
5. Click on the Save button.
Removing Window Groups

If you don't need a Window Group, you can remove it using the eXtender Window Groups window. No data is deleted when you remove a window group.

To remove a Window Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Window Groups from the eXtender Objects list.
3. Select the Window Group that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter Ctrl+O.
5. Click on the Delete button.
Chapter 13: Forms

This chapter will guide you through the creation of a new eXtender Form. An eXtender Form creates a standalone data entry form. Unlike eXtender Windows, eXtender Forms do not have to be attached to an existing Microsoft Dynamics GP window.

This information is divided into the following sections:

- Adding a new Form
- Using Forms
- Modifying an existing Form
- Adding extra windows to a Form
- Setting Form options
- Auto Notes
- Setting Form options
- Creating Form templates
- Setting Form template options
- Using Form templates
- Removing Forms
Adding a new Form

Use the eXtender Forms window to define new Forms. Each form that you create will have an ID and a Description field. The ID field is the unique identifier for the form record. The description field is a description of the record.

To add a new Form:

1. Open the eXtender window (Tools >> eXtender)
2. Select Forms from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Name for the Form.
5. Enter an ID Field Prompt and Description Prompt.
6. Enter prompts and select field types for fields 1 to 12 in Column 1.
7. Enter prompts and select field types for fields 1 to 12 in Column 2.
   For more information on each field type, see Chapter 6, "Field Types".
8. Click on the Save button.
Using Forms

After creating a Form, you can test it using the main eXtender window. The user interface for a Form is the same as a standard Microsoft Dynamics GP window, using the same fields and controls.

To open a Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Forms from the eXtender Objects list.
3. Select the Form that you want to open from the eXtender Resources list
4. Click on the GoTo button and select Use Form or enter CTRL+U

To enter data into a Form:

1. Open the Form
2. Enter values for the ID and Description fields
3. Enter values for the fields on the Form
4. Click on the Save button

To delete a Form record:

1. Open the Form
2. Enter the ID of the record that you want to remove
3. Click on the Delete button

The duplicate function on an eXtender Form allows you to create an exact copy of a record on a Form with a new ID field.

To duplicate a Form record:

1. Open the Form
2. Enter the ID of the record that you want to duplicate
3. Click on the Duplicate button
4. If the auto-increment option is not marked, enter a new ID field
5. Click on the Save button
Modifying an existing Form

You can make changes to a Form using the eXtender Forms window.

To modify an existing Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Forms from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Form
5. Click on the Save button
Adding extra windows to a Form

Use the Extra Windows window to add extra windows to the Form.

An extra window allows you to increase the number of fields available for data entry as well as adding the ability to enter notes on an eXtender Form.

There are 4 types of extra window, Standard, Logic, Note and Note List. A Standard extra window allows you to define 15 additional data entry fields. Logic extra windows do not open a window at all; instead a logic event is triggered. A Note extra window allows you to enter a single note. A Note List extra window allows you to enter a list of date, time and user tracked notes.

When an extra window is added to a Form, a button is added to the bottom of the Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the title of the extra window.

You can have a maximum of 50 extra windows on a Form. Only 8 of these windows are displayed on the main window. Other extra windows are accessible from the Extras menu.

To add an extra data entry window:

1. Click on the Extra Windows button

2. Click on the Add button above the Extra Windows list

![Extra Windows window](image-url)
3. Enter a Button Prompt and Window Name
4. Select Standard as the Window Type
5. Enter prompts and select field types for fields 1 to 15
6. Click on the Save button

To add a logic script:

1. Click on the Extra Windows button.
2. Click on the Add button above the Extra Windows list.

3. Enter a Button Prompt and Window Name.
4. Select Run Logic as the Window Type.
5. Click on the Save button.

Adding a new logic window creates a new logic event on the Logic window for this form. You will still need to create Logic tasks to this event to run logic from the button or menu item. See Chapter 15, “Logic” for more details on adding tasks to logic events.

To add a notes window:
1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list
3. Enter a Button Prompt and Window Name
4. Select Note as the Window Type
5. Click on the Save button

To add a detailed notes window:

1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list
3. Enter a Button Prompt and Window Name
4. Select Note List as the Window Type
5. Enter Note Types
6. Add Auto Notes
7. Click on the Save button
Auto Notes

When the extra window type is selected as Note List, you can assign notes to be automatically created when an event occurs. The events that can be assigned an auto note are:

- Saving a new record
- Updating an existing record
- Sending an email
- Generating a mail merge
- Generating an email merge

To add an Auto Note:

1. Click on the Add button above the Auto Notes list.
2. Select the Auto Note type.
3. If Note Types have been entered, select the Note Type.
4. If the Auto Note type is email, select the email field. If the Auto Note type is a mail merge or email merge, enter the Merge ID.
5. Click on the Save button.

To modify an existing Auto Note:

1. Select the Auto Note that you want to modify from the Auto Notes list.
2. Click on the Edit button above the Auto Notes list.
3. Enter new information for the Auto Note.
4. Click on the Save button.

To remove an Auto Note:

1. Select the Auto Note that you want to remove from the Auto Notes list.
2. Click on the Remove button above the Auto Notes list.
Setting Form options

Use the Options window to set required fields, create a SmartList from the Form data, create a lookup based on the form, set the ID field to auto-increment and set the form to be read only.

To set required fields for the Form:

1. Click on the Options button

2. Mark the fields that you want to be required
3. Click on the Save button

To add the Form to SmartList:

1. Click on the Options button
2. Mark the Add to SmartList option
3. Enter the SmartList Name
4. Click on the Save button

If you want to reference the Form in another eXtender resource, you need to make the form available as a lookup.

To make the form available as a lookup:

1. Click on the Options button
2. Mark the Add to Lookup List option
3. Enter the Lookup Description
4. Click on the Save button

Auto-incrementing allows you default the ID field to the Next ID value. This value is updated every time a new record is saved, by adding 1 to the previous value. The Next ID value can be a combination of letters and numbers, but must always end in a number.

To set the ID field to auto-increment:

1. Click on the Options button
2. Mark the Auto-increment ID Field option
3. Enter the Next ID Field Value
4. Click on the Save button

To set the Form as read only:

1. Click on the Options button
2. Mark the Read Only option
3. Click on the Save button
Creating Form templates

Use the Templates window to add new Form templates.

A Form template is a set of default values for fields on the Form. They can be used to enter data more quickly by automatically assigning values.

To create a template:

1. Click on the Templates button

2. Click on the Add button above the Templates list
3. Enter an ID and Description for the template
4. Select the field that the template will End Focus On
5. Select the default replacement option
6. Add fields to the template

To add a field to the template:

1. Click on the Add button above the Fields list

2. Select the position of the field that you want to default
3. Select the field that you want to default
4. Select the Field Value
5. Select the Replacement option
6. Click on the Save button
Setting Form template options

You can use the Templates window to set the selection method and default template for the Form. The default template will be automatically applied when a new ID field is entered.

To set template options:

1. Click on the Templates button

2. Select the Selection Method
3. Enter the Default Template
4. Click on the Save button
Using Form templates

How you use templates depends on the template Selection Method. There are 3 selection methods, Button, Menu and Prompt.

- If the Button selection method is chosen, there will be a template button available on your Form. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will popup prompting you for the template you want to use.

**To select a template (Button Selection Method):**

1. Open the eXtender Form
2. Enter the ID field value
3. Click on the Templates button
4. Select the Template from the list

**To select a template (Menu Selection Method):**

1. Open the eXtender Form
2. Enter the ID field value
3. Select the template from the Templates menu

**To select a template (Prompt Selection Method):**

1. Open the eXtender Form
2. Enter the ID field value
3. Select the template from the Template Selection popup window
Removing Forms

If you don't need a Form, you can remove it using the eXtender Forms window. If you have already entered data for the Form, the data will also be deleted.

To remove a Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Forms from the eXtender Objects list.
3. Select the Form that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button
Chapter 14: Linked Forms

This chapter will guide you through the creation of an eXtender Linked Form. A Linked Form allows you to record multiple transactions against another Microsoft Dynamics GP or eXtender transaction.

This information is divided into the following sections:

- Adding a new Linked Form
- Using Linked Forms
- Modifying an existing Linked Form
- Adding extra windows to a Linked Form
- Auto Notes
- Setting Linked Form options
- Creating Linked Form templates
- Setting Linked Form template options
- Using Linked Form templates
- Removing Linked Forms
Adding a new Linked Form

Use the eXtender Linked Forms window to define new Linked Forms. Each form that you create will have an ID and a Description field. The ID field is the unique identifier for the form record. The description field is a description of the record.

To add a new Linked Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Linked Forms from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Name for the Linked Form.
5. Select the Lookup that the Linked Form will be linked to
6. Select the ID Field Prompt and Description Prompt
7. Enter prompts and select field types for fields 1 to 10 in Column 1.
8. Enter prompts and select field types for fields 1 to 10 in Column 2.
   For more information on each field type, see Chapter 6, “Field Types”.
9. Click on the Save button
Using Linked Forms

After creating a Linked Form, you can test it using the main eXtender window. The user interface for a Linked Form is the same as a standard Microsoft Dynamics GP window, using the same fields and controls.

To open a Linked Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Linked Forms from the eXtender Objects list.
3. Select the Linked Form that you want to open from the eXtender Resources list.
4. Click on the GoTo button and select Use Form or enter CTRL+U.

To enter data into a Linked Form:

1. Open the Linked Form
2. Enter values for the Linked ID, ID and Description fields.
3. Enter values for the fields on the Form.
4. Click on the Save button.

To delete a Linked Form record:

1. Open the Form
2. Enter the Linked ID and ID of the record that you want to remove.
3. Click on the Delete button.

The duplicate function on an eXtender Linked Form allows you to create an exact copy of a record on a Linked Form with a new ID field.

To duplicate a Linked Form record:

1. Open the Linked Form
2. Enter the Linked ID and ID of the record that you want to duplicate.
3. Click on the Duplicate button.
4. Enter a new ID field.
5. Click on the Save button.
Modifying an existing Linked Form

You can make changes to a Linked Form using the eXtender Linked Forms window.

To modify an existing Linked Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Linked Forms from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Linked Form
5. Click on the Save button
Adding extra windows to a Linked Form

Use the Extra Windows window to add extra windows to the Linked Form.

An extra window allows you to increase the number of fields available for data entry as well as adding the ability to enter notes on an eXtender Linked Form.

There are 4 types of extra window: Standard, Logic, Note and Note List. A Standard extra window allows you to define 15 additional data entry fields. Logic extra windows do not open a window at all; instead a logic event is triggered. A Note extra window allows you to enter a single note. A Note List extra window allows you to enter a list of date, time and user tracked notes.

When an extra window is added to a Linked Form, a button is added to the bottom of the Linked Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the title of the extra window.

You can have a maximum of 50 extra windows on a Linked Form. Only 8 of these windows will be displayed as buttons on the main window. The other main windows are accessible from the Extras menu.

To add an extra data entry window:

1. Click on the Extra Windows button

2. Click on the Add button above the Extra Windows list
3. Enter a Button Prompt and Window Name
4. Select Standard as the Window Type
5. Enter prompts and select field types for fields 1 to 15
6. Click on the Save button

To add a logic script:

1. Click on the Extra Windows button.
2. Click on the Add button above the Extra Windows list.

3. Enter a Button Prompt and Window Name.
4. Select Run Logic as the Window Type.
5. Click on the Save button.

Adding a new logic window creates a new logic event on the Logic window for this form. You will still need to create Logic tasks to this event to run logic from the button or menu item. See Chapter 15, “Logic” for more details on adding tasks to logic events.

To add a notes window:
1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list

3. Enter a Button Prompt and Window Name
4. Select Note as the Window Type
5. Click on the Save button

To add a detailed notes window:

1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list

3. Enter a Button Prompt and Window Name
4. Select Note List as the Window Type
5. Enter Note Types
6. Add Auto Notes
7. Click on the Save button
Auto Notes

When the extra window type is selected as Note List, you can assign notes to be automatically created when an event occurs. The events that can be assigned an auto note are:

- Saving a new record
- Updating an existing record
- Sending an email
- Generating a mail merge
- Generating an email merge

To add an Auto Note:

1. Click on the Add button above the Auto Notes list.

2. Select the Auto Note type.
3. If Note Types have been entered, select the Note Type
4. If the Auto Note type is email, select the email field. If the Auto Note type is a mail merge or email merge, enter the Merge ID.
5. Click on the Save button.

To modify an existing Auto Note:

1. Select the Auto Note that you want to modify from the Auto Notes list.
2. Click on the Edit button above the Auto Notes list.
3. Enter new information for the Auto Note.
4. Click on the Save button.

To remove an Auto Note:

1. Select the Auto Note that you want to remove from the Auto Notes list.
2. Click on the Remove button above the Auto Notes list.
Setting Linked Form options

Use the Options window to set required fields and create a SmartList based on the Linked Form data.

To set required fields for the Linked Form:

1. Click on the Options button
2. Mark the fields that you want to be required
3. Click on the Save button

To add the Linked Form to SmartList:

1. Click on the Options button
2. Mark the Add to SmartList option
3. Enter the SmartList Name
4. Click on the Save button
Creating Linked Form templates

Use the Templates window to add new Linked Form templates.

A Linked Form template is a set of default values for fields on the Linked Form. They can be used to enter data more quickly by automatically assigning values.

To create a template:

1. Click on the Templates button.

2. Click on the Add + button above the Templates list.
3. Enter an ID and Description for the template.
4. Select the field that the template will End Focus On.
5. Select the default replacement option
6. Add fields to the template

To add a field to the template:

1. Click on the Add button above the Fields list

   ![Add Template Field](image)

2. Select the position of the field that you want to default
3. Select the field that you want to default
4. Select the Field Value
5. Select the Replacement option
6. Click on the Save button
Setting Linked Form template options

You can use the Templates window to set the selection method and default template for the Linked Form. The default template will be automatically applied when a new ID field is entered.

To set template options:

1. Click on the Templates button

2. Select the Selection Method

3. Enter the Default Template

4. Click on the Save button
Using Linked Form templates

How you use templates depends on the template Selection Method. There are 3 selection methods, Button, Menu and Prompt.

- If the Button selection method is chosen, there will be a template button available on your Linked Form. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will popup prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the eXtender Linked Form
2. Enter Linked ID and ID field values
3. Click on the Templates button
4. Select the Template from the list

To select a template (Menu Selection Method):

1. Open the eXtender Linked Form
2. Enter Linked ID and ID field values
3. Select the template from the Templates menu

To select a template (Prompt Selection Method):

1. Open the eXtender Linked Form
2. Enter Linked ID and ID field values
3. Select the template from the Template Selection popup window
Removing Linked Forms

If you don't need a Linked Form, you can remove it using the eXtender Linked Forms window. If you have already entered data for the Linked Form, the data will also be deleted.

To remove a Linked Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Linked Forms from the eXtender Objects list.
3. Select the Linked Form that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter Ctrl+O
5. Click on the Delete button
Chapter 15: Detail Forms

This chapter will guide you through the creation of an eXtender Detail Form. An eXtender Detail Form allows you to create a form with a header record and detail line items.

This information is divided into the following sections:

- Adding a new Detail Form
- Using Detail Forms
- Modifying an existing Detail Form
- Adding extra windows to a Detail Form
- Auto Notes
- Setting Detail Form options
- Creating Detail Form templates
- Setting Detail Form template options
- Using Detail Form templates
- Removing Detail Forms
Adding a new Detail Form

Use the eXtender Detail Forms window to define new Detail Forms. Each form that you create will have an ID and a Description field. The ID field is the unique identifier for the form record. The description field is a description of the record.

To add a new Detail Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Detail Forms from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Detail Form.
5. Select the ID Field Prompt and Description Prompt
6. Enter prompts and select field types for fields 1 to 6 in Column 1 of the header.
7. Enter prompts and select field types for fields 1 to 6 in Column 2 of the header.
8. Enter prompts and select field types for fields 1 to 12 of the detail fields.
   For more information on each field type, see Chapter 6, “Field Types”.
9. Mark R1 to place the detail field into the first row. Mark R2 to place the detail field into the second row.
   You must have at least 1 field on one of the detail field rows.
10. Click on the Save button.
If a detail field is not marked as Row 1 or Row 2, it is still accessible on an expansion window. This window can be opened by clicking on the expansion button above the first field of the first row on the scrolling window.
Using Detail Forms

After creating a Detail Form, you can test it using the main eXtender window. The user interface for a Detail Form is the same as a standard Microsoft Dynamics GP window, using the same fields and controls.

To open a Detail Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Detail Forms from the eXtender Objects list.
3. Select the Detail Form that you want to open from the eXtender Resources list.
4. Click on the GoTo button and select Use Form or enter CTRL+U.

To enter data into a Detail Form:

1. Open the Detail Form
2. Enter values for the ID and Description fields
3. Enter values for the fields on the Detail Form
4. Enter values for the fields of the detail lines on the Detail Form
5. Click on the Save button.

To delete a Detail Form record:

1. Open the Detail Form
2. Enter the ID of the record that you want to remove
3. Click on the Delete button.

The duplicate function on an eXtender Detail Form allows you to create an exact copy of a record on a Detail Form with a new ID field.

To duplicate a Detail Form record:

1. Open the Detail Form
2. Enter the ID of the record that you want to duplicate
3. Click on the Duplicate button.
4. Enter a new ID field
5. Click on the Save button
Modifying an existing Detail Form

You can make changes to a Detail Form using the eXtender Detail Forms window.

To modify an existing Detail Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Forms from the eXtender Objects list.
3. Click on the Open button or enter CTRL+O
4. Enter new information for the Detail Form
5. Click on the Save button
Adding extra windows to a Detail Form

Use the Extra Windows window to add extra windows to the Detail Form.

An extra window allows you to increase the number of fields available for data entry as well as adding the ability to enter notes on an eXtender Detail Form.

There are 4 types of extra window: Standard, Logic, Note and Note List. A Standard extra window allows you to define 15 additional data entry fields. Logic extra windows do not open a window at all; instead a logic event is triggered. A Note extra window allows you to enter a single note. A Note List extra window allows you to enter a list of date, time and user tracked notes.

When an extra window is added to a Detail Form, a button is added to the bottom of the Detail Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the title of the extra window.

You can have a maximum of 50 extra windows on a Detail Form. Only 4 of these windows will have buttons displayed on the main window. The other extra windows are available from the Extras menu.

To add an extra data entry window:

1. Click on the Extra Windows button

2. Click on the Add button above the Extra Windows list
3. Enter a Button Prompt and Window Name
4. Select Standard as the Window Type
5. Enter prompts and select field types for fields 1 to 15
6. Click on the Save button

To add a logic script:

1. Click on the Extra Windows button.
2. Click on the Add button above the Extra Windows list.

3. Enter a Button Prompt and Window Name.
4. Select Run Logic as the Window Type.
5. Click on the Save button.

Adding a new logic window creates a new logic event on the Logic window for this form. You will still need to create Logic tasks to this event to run logic from the button or menu item. See Chapter 15, "Logic" for more details on adding tasks to logic events.

To add a notes window:

1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list

3. Enter a Button Prompt and Window Name
4. Select Note as the Window Type
5. Click on the Save button

To add a detailed notes window:

1. Click on the Extra Windows button
2. Click on the Add button above the Extra Windows list

3. Enter a Button Prompt and Window Name
4. Select Note List as the Window Type
5. Enter Note Types
6. Add Auto Notes
7. Click on the Save button
Auto Notes

When the extra window type is selected as Note List, you can assign notes to be automatically created when an event occurs. The events that can be assigned an auto note are:

- Saving a new record
- Updating an existing record
- Sending an email
- Generating a mail merge
- Generating an email merge

To add an Auto Note:

1. Click on the Add button above the Auto Notes list.

2. Select the Auto Note type.
3. If Note Types have been entered, select the Note Type.
4. If the Auto Note type is email, select the email field. If the Auto Note type is a mail merge or email merge, enter the Merge ID.
5. Click on the Save button.

To modify an existing Auto Note:

1. Select the Auto Note that you want to modify from the Auto Notes list.
2. Click on the Edit button above the Auto Notes list.
3. Enter new information for the Auto Note.
4. Click on the Save button.

To remove an Auto Note:

1. Select the Auto Note that you want to remove from the Auto Notes list.
2. Click on the Remove button above the Auto Notes list.
Setting Detail Form options

Use the Options window to set required fields, create SmartList objects from the Detail Form data, create a lookup based on the Detail Form, select a total field, and set the ID field to auto-increment.

*To set required fields for the Detail Form:*

1. Click on the Options button

2. Mark the fields that you want to be required

3. Click on the Save button

Detail Forms can be used to generate 2 SmartList objects, one will show the header information only, and the other will show both header and detail information.

*To add the Detail Form to SmartList:*

1. Click on the Options button
2. Mark the Add Header to SmartList option
3. Enter the Header SmartList Name
4. Mark the Add Detail to SmartList option
5. Enter the Detail SmartList Name
6. Click on the Save button

If you want to reference the Detail Form in another eXtender resource, you need to make it available as a lookup.

**To make the Detail Form available as a lookup:**

1. Click on the Options button
2. Mark the Add To Lookup List option
3. Enter the Lookup Description
4. Click on the Save button

**To display a total field on the Detail Form:**

1. Click on the Options button.
2. Mark the Show Total option.
3. Select the detail field that you want to total.
4. Click on the Save button.

Auto-incrementing allows you default the ID field to the Next ID value. This value is updated every time a new record is saved, by adding 1 to the previous value. The Next ID value can be a combination of letters and numbers, but must always end in a number.

**To set the ID field to auto-increment:**
1. Click on the Options button
2. Mark the Auto-increment ID Field option
3. Enter the Next Field ID value.
4. Click on the Save button.
Creating Detail Form templates

Use the Templates window to add new Detail Form templates.

A Detail Form template is a set of default values for fields and detail lines on the Detail Form. They can be used to enter data more quickly by automatically assigning values and entering lines.

To create a template:

1. Click on the Templates button

2. Click on the Add button above the Templates list
3. Enter an ID and Description for the template
4. Select the field that the template will End Focus On
5. Select the default replacement option
6. Add fields to the template

To add a field to a template:

1. Click on the Add button above the Header Fields list
2. Select the position of the field that you want to default
3. Select the field that you want to default
4. Select the Field Value
5. Select the Replacement option
6. Click on the Save button

To add a detail line to a template:

1. Click on the Add button above the Detail Lines list
2. Add fields to the detail line
3. Click on the OK button

To add a field to a detail line:

1. Click on the Add button above the Detail Fields list
2. Select the field that you want to default
3. Select the Field Value
4. Select the Replacement option
5. Click on the Save button
Setting Detail Form template options

You can use the Templates window to set the selection method and default template for the Detail Form. The default template will be automatically applied when a new ID field is entered.

To set template options:

1. Click on the Templates button

2. Select the Selection Method
3. Enter the Default Template
4. Click on the Save button
Using Detail Form templates

How you use templates depends on the template Selection Method. There are 3 selection methods, Button, Menu and Prompt.

- If the Button selection method is chosen, there will be a template button available on your Detail Form. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will popup prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the eXtender Detail Form
2. Enter the ID field value
3. Click on the Templates button
4. Select the Template from the list

To select a template (Menu Selection Method):

1. Open the eXtender Detail Form
2. Enter the ID field value
3. Select the template from the Templates menu

To select a template (Prompt Selection Method):

1. Open the eXtender Detail Form
2. Enter the ID field value
3. Select the template from the Template Selection popup window
Removing Detail Forms

If you don't need a Detail Form, you can remove it using the eXtender Detail Forms window. If you have already entered data for the Detail Form, the data will also be deleted.

To remove a Detail Form:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Forms from the eXtender Objects list.
3. Select the Detail Form that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button
Chapter 16: Logic

Logic can be used to add conditional functionality to a window, form, linked form or detail form. The Logic window can be opened from the eXtender Window, Form, Linked Form and Detail Form Maintenance windows by clicking on the Logic button.

Logic is made up of 3 parts; Events, Tasks and Conditions. When an event is triggered, the tasks for that event are run if the conditions for each task are met.

This information is divided into the following sections:

- Events
- Tasks
- Disable Fields
- Enable Fields
- Clear Values
- Set Value
- Execute Script
- Run SQL Script
- Apply Template
- Run Macro
- Run Application
- Run Office Report
- Trigger Event
- List Actions
- Conditions
Events

An event is an action that occurs within your eXtender application. You can use events to trigger new functionality in your application. When you open the Logic window, all events for the eXtender resource are displayed. When you select an event, all logic tasks for the event are displayed in the Tasks list. Events that have tasks are indicated with an icon.

There are 15 types of standard events that can be added:

- **Save Record** – triggers when a new record is created or an existing record is updated
- **Delete Record** – triggers when an existing record is deleted
- **Open Form** – triggers when the form or window is opened and when the Clear button on a form is selected
- **Close Form** – triggers when the form or window is closed
- **Field Entry** – triggers when you tab into or click on a field
- **Field Exit** – triggers when you tab out of a field or select another field
- **Field Change** – triggers when the value of a field changes
- **Post Record** – triggers when a posting routine is run
- **Print** – triggers when the Print button is clicked or Print is selected from the File menu
- **Open Extra Window** – triggers when an extra window is opened
- **Close Extra Window** – triggers when an extra window is closed
- **Line Entry** – triggers when a line on a Detail Form is entered
- **Line Exit** – triggers when a line on a Detail Form is exited
- **Line Change** – triggers when a line on a Detail Form is changed
- **Delete Line** – triggers when a line on a Detail Form is deleted
Tasks

Tasks are functions that are performed when an event is triggered. There are 10 types of tasks that can be performed:

- Disable Fields – disable one or more fields
- Enable Fields – enable one or more fields
- Clear Values – clear the values of one or more fields
- Set Value – set the value of a field
- Apply Template – applies a selected template
- Execute Script – execute a Dexterity SanScript script
- Run SQL Script – run a SQL script
- Run Application – run an external application
- Run Macro – run a recorded Microsoft Dynamics GP macro
- Trigger Event – run the tasks from another event

To add a task:

1. Select the event that you want to add a task to.
2. Click on the Add button above the Tasks list and select the task type.
3. Enter the details for the task.
4. Click on the Save button.

To modify an existing task:

1. Select the task that you want to modify from the Tasks list.
2. Click on the Edit Task button above the Tasks list.
3. Enter the new information for the task.
4. Click on the Save button.

If you no longer want a task to be run, it can be removed. All conditions for the task are also removed at the same time.

To remove a task:

1. Select an event from the Events list.
2. Select the task that you want to remove from the Tasks list.
3. Click on the Remove Task button above the Tasks list.
Disable Fields

A Disable Fields task disables a number of fields on the eXtender resource. Fields on extra windows are only disabled if the window is open.

To add a Disable Fields task:

1. Select the event from the Events list that you want to add a Disable Fields task to.
2. Click on the Add Task button above the Tasks list and select Disable Fields from the drop-down list.
3. Enter the name of the task.
4. Mark the fields that you want to disable.
5. Click on the Save button.
Enable Fields

An Enable Fields task enables a number of fields on the eXtender resource. Fields on extra windows are only enabled if the window is open.

To add an Enable Fields task:

1. Select the event from the Events list that you want to add an Enable Fields task to.
2. Click on the Add Task button above the Tasks list and select Enable Fields from the drop-down list.
3. Enter the name of the task.
4. Mark the fields that you want to enable.
5. Click on the Save button.
Clear Values

A Clear Values task clears a number of fields on the eXtender resource. Fields on extra windows are cleared regardless of whether the extra window is open.

To add a Clear Values task:

1. Select the event from the Events list that you want to add a Clear Values task to.
2. Click on the Add Task button above the Tasks list and select Clear Values from the drop-down list.
3. Enter the name of the task.
4. Mark the fields that you want to clear.
5. Click on the Save button.
Set Value

A Set Value task sets the value of a single field on the eXtender resource. You can always set the value or only set the value when the field is empty.

1. Select the event from the Events list that you want to add a Set Value task to.
2. Click on the Add Task button above the Tasks list and select Set Value from the drop-down list.
3. Enter the name of the task.
4. Select the field that you want to set the value of.
5. Enter the value that you want to set the field to.
6. If you want to overwrite the existing value of the field, mark the Replace Existing checkbox.
7. Click on the Save button.
Execute Script

An Execute Script task executes a Dexterity script inside any of the products loaded in your set file. Parameters can be added to replace values in the script with values from the eXtender resource.

To add an Execute Script task:

1. Select the event from the Events list that you want to add an Execute Script task to.
2. Click on the Add Task button above the Tasks list and select Execute Script from the drop-down list.
3. Enter the name of the task.
4. Select the product that you want to execute the script in.
5. Enter parameters for the script.
6. Enter the script that you want to execute.
7. Click on the Save button.

To add a parameter:

1. Click on the Add Parameter button above the Parameters list.
2. Enter the name of the parameter.
3. Select the Field that you want to use to replace the parameter.
4. Select the parameter type. If you select Read, each instance of the parameter name in the script is replaced by the field value from the eXtender resource. If you select Write, the value on the eXtender resource is updated with the value of the field at the end of the script. If you select Read/Write, each parameter is replaced and the value on the eXtender resource is updated.

5. Click on the Save button.

To modify a parameter:

1. Select the parameter that you want to modify from the Parameters list.
2. Click on the Edit button above the Parameters list.
3. Enter the new information for the parameter.
4. Click on the Save button.

To remove a parameter:

1. Select the parameter that you want to remove from the Parameters list.
2. Click on the Remove button above the Parameters list.
Run SQL Script

A Run SQL Script task executes a SQL script inside any of the databases on your SQL Server.

To add a Run SQL Script task:

1. Select the event from the Events list that you want to add a Run SQL task to.
2. Click on the Add Task button above the Tasks list and select Run SQL from the drop-down list.
3. Enter the name of the task.
4. Select the database that you want run the SQL script in.
5. Enter parameters for the script.
6. Enter the SQL script that you want to run.
7. Click on the Save button.

To add a parameter:

1. Click on the Add Parameter button above the Parameters list.
2. Enter the name of the parameter.
3. Select the Field that you want to use to replace the parameter.
4. Click on the Save button.

To modify a parameter:
1. Select the parameter that you want to modify from the Parameters list.
2. Click on the Edit button above the Parameters list.
3. Enter the new information for the parameter.
4. Click on the Save button.

To remove a parameter:

1. Select the parameter that you want to remove from the Parameters list.
2. Click on the Remove button above the Parameters list.
Apply Template

An Apply Template task applies a template from the eXtender resource. This task type is only displayed if there are eXtender resources added to the eXtender resource.

To add an Apply Template task:

1. Select the event from the Events list that you want to add an Apply Template task to.
2. Click on the Add Task button above the Tasks list and select Apply Template from the drop-down list.
3. Enter the name of the task.
4. Select the Template that you want to apply.
5. Click on the Save button.

The Apply Template task will not be available to be selected from the Add Task button if there are no templates set up.
Run Macro

A Run Macro task runs a Microsoft Dynamics GP macro.

To add a Run Macro task:

1. Select the event from the Events list that you want to add a Run Macro task to.
2. Click on the Add Task button above the Tasks list and select Run Macro from the drop-down list.
3. Enter the name of the task.
4. Enter the filename of the macro that you want to run.
5. Click on the Save button.
Run Application

A Run Application Task runs an external application. You can pass a single parameter to the application.

1. Select the event from the Events list that you want to add a Run Application task to.
2. Click on the Add Task + button above the Tasks list and select Run Application from the drop-down list.

3. Enter the name of the task.
4. Enter the filename of the application that you want to run.
5. Select the parameter option. If the Constant option is selected, enter the parameter value that you want to pass to the application. If the Field option is selected, select the field that you want to pass as a parameter to the application.
6. Click on the Save button.
Trigger Event

A Trigger Event task runs all of the tasks from another event. This allows you to run the same tasks without having to recreate them for each event.

1. Select the event from the Events list that you want to add a Trigger Event task to.
2. Click on the Add Task button above the Tasks list and select Trigger Event from the drop-down list.
3. Enter the name of the task.
4. Select the event that you want to trigger.
5. Click on the Save button.
List Actions

List actions are events that you can define for the Actions button on Navigation Lists. Actions can be organized into groups. These groups are displayed as separate submenus in the Actions button. New actions are added to the Events list on the main Logic window. Tasks that are added to these events are run when the action is selected from the Actions button.

To add an action group:

1. Click on the List Actions button to open the List Actions window.
2. Click on the Add button above the Groups list.
3. Enter the name of the Group.
4. Click on the Save button.

To add an action:

1. Select the group from the Groups list that you want to add an action to.
2. Click on the Add button above the Actions list.
3. Enter the name of the Action.
4. Click on the Save button.

**To modify an action group:**

1. Select the group that you want to modify from the Groups list.
2. Click on the Edit button above the Groups list.
3. Enter the new information for the group.
4. Click on the Save button.

**To modify an action:**

1. Select the action that you want to modify from the Actions list.
2. Click on the Edit button above the Actions list.
3. Enter the new information for the action.
4. Click on the Save button.

**To remove an action group:**

1. Select the group that you want to remove from the Groups list.
2. Click on the Remove button above the Groups list.

⚠️ You cannot remove groups that have actions.

**To remove an action:**

1. Select the action that you want to remove from the Actions list.
2. Click on the Remove button above the Actions list.
Conditions

A condition is a rule that must be met before a task can be run. You can add more than one condition for each task. If there is more than one condition for a task, all conditions must be met before the task will run.

To add a condition:

1. Select the event from the Events list.
2. Select the task from the Tasks list to add a condition to.
3. Click on the Add Condition button above the Conditions list.
4. Select the field to base the condition on.
5. Select the condition type.
6. Enter the value of the field.
7. Click on the Save button.

To modify an existing condition:

1. Select the condition that you want to modify from the Conditions list.
2. Click on the Edit Condition button above the Conditions list.
3. Enter the new information for the condition.
4. Click on the Save button.

If you no longer want a condition on a task, it can be removed.

To remove a condition:

1. Select an event from the Events list.
2. Select a task from the Tasks list.
3. Select the condition that you want to remove from the Conditions list.
4. Click on the Remove Condition button above the Conditions list.
Chapter 17: Multicurrency

If you have multicurrency management registered, you can create multicurrency forms, linked forms and detail forms.

This information is divided into the following sections:

- Multicurrency Settings
- Using Multicurrency Features
Multicurrency Settings

When multicurrency management is registered, there is a Multicurrency button displayed at the bottom of the eXtender Forms, eXtender Detail Forms and eXtender Linked Forms windows. Clicking on the button opens the Multicurrency Settings window, where you can specify the multicurrency settings for the form.

To set multicurrency settings:

1. Click on the Multicurrency button to open the Multicurrency Settings window.

2. Mark the Multicurrency checkbox to select the form as being able to use multicurrency functions.

3. Select the field that will be used to control the currency. This field will be a lookup field of type currency.

4. Enter the default rate type that will be used when entering records for the form.

5. Select the currency default method:
   - None – the currency will not be defaulted
   - Functional currency – the currency will always default to the functional currency
   - Customer – the currency will be defaulted to the currency of a customer
   - Vendor – the currency will be defaulted to the currency of a vendor

6. If you have selected Customer or Vendor as the default method, select the field that contains the customer or vendor lookup.

7. Click on the Save button.
Using Multicurrency Features

If a form has been selected as a multicurrency form, currency fields can be displayed in both the originating and functional currencies. When the originating currency is changed, the functional currency is changed based on the exchange rate. Similarly, the originating currency is updated when the functional currency is changed.

When an eXtender form, detail form or linked form is set up to use multicurrency, there are 2 new fields displayed; the currency view button and the currency field expansion button.

The currency view button is a drop down list that allows you to select to display the currency (and currency calculation) fields in the originating or functional currency.

The currency expansion button is placed next to the currency lookup field. Clicking on this button opens the Exchange Rate Entry window, where you can modify the exchange rate settings for the current record.

*To change the exchange rate for a record:*

1. Click on the currency field expansion to open the Exchange Rate Entry window.
2. If the selected currency is different from the functional currency, you will be able to change the rate type and the exchange rate.
3. Click on the OK button to save your changes and recalculate the functional currency amounts on the eXtender form.
Part 5: Data Entry Tools

This portion of the manual describes the features of eXtender that enhance the data entry features of eXtender.

The information is divided into the following chapters:

- **Chapter 18, “Lookups”,** describes how to create a new lookup window from existing Microsoft Dynamics GP data.

- **Chapter 19, “Menus”,** describes how to create a new menu to contain eXtender objects.

- **Chapter 20, “Toolbars”,** describes how to create a new toolbar to contain eXtender objects.

- **Chapter 21, “Navigation Lists”,** describes how to create a navigation list windows to manage data entered in eXtender data entry objects.

- **Chapter 22, “Imports”,** describes how to create an import and import data into an eXtender data entry object.

- **Chapter 23, “Processes”,** describes how to create process forms.
Chapter 18: Lookups

This chapter will guide you through the creation of an eXtender Lookup. An eXtender Lookup allows you to create a new lookup window that can be used to select and validate data for a lookup field on an eXtender Window or Form. The data for the lookup is contained within an existing Microsoft Dynamics GP table.

This information is divided into the following sections:

- Adding a new Lookup
- Modifying an existing Lookup
- Removing Lookups
Adding a new Lookup

Use the eXtender Lookups window to define new Lookups.

To add a new Lookup:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Lookups from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Lookup.
5. Select the Product, Series and Table for the Lookup.
6. Select the ID Field and Description Field for the Lookup.
7. Click on the Save button.
Modifying an existing Lookup

You can make changes to a Lookup using the eXtender Lookups window.

To modify an existing Lookup:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Lookups from the eXtender Objects list.
3. Select the Lookup that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Enter the new information for the Lookup
6. Click on the Save button

To update Lookup values:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Lookups from the eXtender Objects list.
3. Select the Lookup that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Select Extras >> Tools >> Initialize Lookup Values.
Removing Lookups

If you don’t need a Lookup, you can remove it using the eXtender Lookups window.

*To remove a Lookup:*

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Detail Forms from the eXtender Objects list.
3. Select the Detail Form that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Click on the Delete button
Chapter 19: Menus

This chapter will guide you through the creation of an eXtender Menu. An eXtender Menu allows you to add your eXtender objects to the Microsoft Dynamics GP menu structure. You can select to add your menu into the Transactions, Inquiry, Reports, Cards or Routines menus.

This information is divided into the following sections:

- Adding a new Menu
- Modifying an existing Menu
- Sorting Menu items
- Removing Menus
Adding a new Menu

Use the eXtender Menus window to define new Menus.

To add a new Menu:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Menus from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Menu.
5. Select the Menu Group for the Menu.
6. Add the items that you want to be on the Menu. You can add a maximum of 20 items to each menu.
7. Click on the Save button.
To add a Menu item:

1. Click on the Add button to open the Add Command window.

2. Select the object group that the command is a member of.
3. Select the command that you want to add to the menu.
4. Click on the OK button.

To remove a Menu item:

1. Select the Menu item you want to remove.
2. Click on the Delete button.

You will need to restart Microsoft Dynamics GP before the menu will be available
Modifying an existing Menu

You can make changes to a Menu using the eXtender Menus window.

To modify an existing Menu:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Menus from the eXtender Objects list.
3. Select the Menu that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Enter the new information for the Menu
6. Click on the Save button
Sorting Menu items

You can use the eXtender Menus window to change the order in which items on the menu are displayed.

To change the order of an item on a Menu:

1. Select the Menu item you want to move
2. Click on the Move Up button to move the menu item up and click on the Move Down button to move the menu item up. If the selected menu item is already the first item in the menu, the Move Up button will be disabled. If the selected menu item is already the last item in the menu, the Move Down button will be disabled.

You will need to restart Microsoft Dynamics GP before any changes to the menu will be made.
Removing Menus

If you don’t need a Menu, you can remove it using the eXtender Menus window.

To remove a Menu:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Menus from the eXtender Objects list.
3. Select the Menu that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O.
5. Click on the Delete button.
Chapter 20: Toolbars

This chapter will guide you through the creation of an eXtender Toolbar. An eXtender Toolbar allows you to add your eXtender objects to the Microsoft Dynamics GP toolbar.

This information is divided into the following sections:

- Adding a new Toolbar
- Modifying an existing Toolbar
- Sorting Toolbar items
- Removing Toolbars
Adding a new Toolbar

Use the eXtender Toolbars window to define new Toolbars.

To add a new Toolbar:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Toolbars from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Toolbar.
5. Add the items that you want to be on the Toolbar. You can add a maximum of 10 items to each Toolbar.
6. Click on the Save button.
To add a Toolbar item:

1. Click on the Add button to open the Add Command window.

2. Select the object group that the command is a member of.
3. Select the command that you want to add to the toolbar.
4. Click on the OK button.

To remove a Toolbar item:

1. Select the Toolbar item you want to remove.
2. Click on the Delete button.

You will need to restart Microsoft Dynamics GP before the menu will be available.
Modifying an existing Toolbar

You can make changes to a Toolbar using the eXtender Toolbars window.

To modify an existing Toolbar:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Toolbars from the eXtender Objects list.
3. Select the Toolbar that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O
5. Enter the new information for the Toolbar
6. Click on the Save button
Sorting Toolbar items

You can use the eXtender Toolbars window to change the order in which items on the toolbar are displayed.

To change the order of an item on a Toolbar:

1. Select the Toolbar item you want to move
2. Click on the Move Up button to move the toolbar item up and click on the Move Down button to move the toolbar item up. If the selected toolbar item is already the first item in the menu, the Move Up button will be disabled. If the selected toolbar item is already the last item in the toolbar, the Move Down button will be disabled.

You will need to restart Microsoft Dynamics GP before any changes to the toolbar will be made.
Removing Toolbars

If you don't need a Toolbar, you can remove it using the eXtender Toolbars window.

To remove a Toolbar:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Toolbars from the eXtender Objects list.
3. Select the Toolbar that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL+O.
5. Click on the Delete button.
Chapter 21: Navigation Lists

This chapter will guide you through the creation of an eXtender Navigation List. eXtender Navigation Lists provide interfaces to organize data contained within eXtender Forms, Linked Forms and Detail Forms so that it can be easily referenced and accessed.

This information is divided into the following sections:

- Adding a new Navigation List
- Using Standard Navigation Lists
- Using List Values Navigation Lists
- Using Calendar Navigation Lists
- Using Combination Navigation Lists
- Modifying an existing Navigation List
- Setting color coding options
- Options
- Adding Restrictions
- Removing Navigation Lists
Adding a new Navigation List

Use the eXtender Navigation Lists window to define new Navigation Lists.

There are 4 types of eXtender Navigation List:

- **Standard** - provides a search engine style interface
- **Calendar** - provides a calendar style interface where users can select a date and a second search parameter to restrict the records shown
- **Combination** - allows up to 8 parameters that can be selected to restrict the records shown
- **List Values** - displays a list of parameters that can be used to restrict the records shown

**To add a new Navigation List:**

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Navigation List.
5. Select the eXtender Type and eXtender ID that you want to base the Navigation List upon.
6. Select the List Type.
7. Select Search Fields.
8. Select Display Fields.
9. Click on the Save button.

Search fields are fields that can be used to restrict the records shown. If the field is a text field, you can select whether the search will use exact or partial matching.
To select a search field:

1. Click on the Add button above the Search Fields list.
2. Select the Search Field.
3. If the field selected is a string field, select the Search Method.
4. Click on the Save button.

*If the search is based on a multicurrency form, only originating currency fields can be selected as search fields*

Display Fields are the fields that are displayed when a record is found by the Navigation List.

To select a Display field:

1. Click on the Add button above the Display Fields list.
2. Select the Display Field/s that you want to add to the Navigation List results.
3. Click on the Add button.

*If the search is based on a multicurrency form, both originating and functional currency fields can be selected as display fields*
Using Standard Navigation Lists

To find a record using a Standard Navigation List:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the Standard Navigation List from the eXtender Resources list.
4. Click on the GoTo button and select Use Navigation List or enter CTRL+U

5. Enter a search string

You can search for a phrase by enclosing the phrase in quotes. Entering an asterisk in the search string will return all records.
Using Calendar Navigation Lists

To find a record using a Calendar Navigation Lists:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the Calendar Navigation List from the eXtender Resources list.
4. Click on the GoTo button and select Use Navigation List or enter CTRL+U.
5. Select the date from the calendar that you want to restrict on. Use the Previous and Next buttons to move between months.
6. Select the secondary restriction method.
7. Select a value from the secondary restriction list.

You can quickly select a month and year by clicking on the Month/Year prompt above the Calendar.
Using Combination Navigation Lists

To find a record using a Combination Navigation List:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the Combination Navigation List from the eXtender Resources list.
4. Click on the GoTo button and select Use Navigation List or enter CTRL+U
5. Enter values for each field that you want to restrict

*Use the Clear button to restart a Combination Navigation List.*
Using List Values Navigation Lists

To find a record using a List Values Navigation List:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the List Values Navigation List from the eXtender Resources list.
4. Click on the GoTo button and select Use Navigation List or enter CTRL+U
   ![Image of equipment list]
5. Select a restriction method
6. Select a restriction value

You can export to currently displayed values to Excel by clicking on the Excel button.

![Excel button]
Modifying an existing Navigation List

You can make changes to a Navigation List using the eXtender Navigation Lists window.

To modify an existing Navigation List:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the Navigation List that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Navigation List.
6. Click on the Save button.
Setting color coding options

Use the Color Coding window to assign colors to records based on a field in the eXtender resource.

To set color coding options:

1. Click on the Color button.

2. Mark the Color Code option.
3. Select the field to base the color coding on.

Only list fields can be selected to be used to base the color coding on.

4. Select colors for each field value.
5. Click on the OK button.
Options

Use the Options window to select which details should be displayed and which actions should be enabled when a record is selected on the Navigation List window.

To set Navigation List options:

1. Click on the Options button

![Options window screenshot]

2. Mark the Actions and Details that you want to display.
3. Click on the OK button.
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Navigation List.

To add restrictions:

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.

To remove restrictions:
1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Removing Navigation Lists

If you don’t need a Navigation List, you can remove it using the eXtender Navigation Lists window.

To remove a Navigation List:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Navigation Lists from the eXtender Objects list.
3. Select the Navigation List that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 22: Imports

This chapter will guide you through the creation of an eXtender Import. An eXtender Import can be used to import data into an eXtender Window, Form, Linked Form or Detail Form.

This information is divided into the following sections:

- Adding a new Import
- Multicurrency
- Using Imports
- Modifying an existing Import
- Removing Imports
Adding a new Import

To add a new Import:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Imports from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Import.
5. Select the Import Type
6. Select the eXtender ID
7. Select the File Type
8. Map the eXtender fields to the position in the file
   - If the File Type is Excel, select the Row numbers corresponding to each eXtender field that you want to import
   - If the File Type is tab or comma delimited, select the field number in the file corresponding to each eXtender field that you want to import
   - If the File Type is fixed width, select the start and end positions of each eXtender field that you want to import

   If the field position is left empty, that field will be left blank by the import
**Multicurrency**

If you are importing records into a multicurrency form, you should have a default method specified for the currency if you are not importing the currency ID. If you do not have a default method, the exchange rates will not be defaulted and the functional currencies will not be calculated. Exchange rates cannot be imported.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms, detail forms and linked forms.
Using Imports

To import records:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Imports from the eXtender Objects list.
3. Select the Import that you want to import data for from the eXtender Resources list.
4. Click on the GoTo button and select Use Import or enter CTRL+U.
5. Enter the file that contains the data to import.
6. If the file selected has a header record, mark the File has header record option.
7. Click on the Import button.
Modifying an existing Import

You can make changes to an Import using the eXtender Imports window.

To modify an existing Import:

1. Open the eXtender Window (Tools >> eXtender >> eXtender)
2. Select Imports from the eXtender Objects list.
3. Select the Import that you want to modify from the eXtender Resources list
4. Click on the Open button or enter CTRL+O.
5. Enter the new information for the Import.
6. Click on the Save button.
Removing Imports

If you don’t need an Import, you can remove it using the eXtender Imports window.

To remove an Import:

1. Open the eXtender Window (Tools >> eXtender >> eXtender)
2. Select Imports from the eXtender Objects list.
3. Select the Import that you want to remove from the eXtender Resources list
4. Click on the Open button or enter CTR+O.
5. Click on the Delete button.
Chapter 23: Processes

Processes allow you to create windows that run a process for a range of records. The process can be based on a Form, Detail Form or Linked Form. You can select to delete records, print reports or run a custom process.

This information is divided into the following sections:

- Adding a new Process
- Input Fields
- Custom Processes
- Range Fields
- Using Processes
- Modifying an existing Process
- Removing Processes
Adding a new Process

You can use the Extender Process Setup window to add new processes.

To add a new process:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Processes from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Process.
5. Select the Form Type.
6. If the Form Type is not (none), then enter the Form ID and select the Process Type.
7. Select input fields for the process.
8. If the Process Type is Custom, enter the custom process.
9. Select range fields for the process.
10. Click on the Save button.
Input Fields

Input fields are used to allow end user to enter a value to be used by a custom process. You can add up to 5 input fields to a process.

To add an input field:

1. Click on the Add button above the Input Fields list.

![Add Input Field](image)

2. Enter the Field Prompt. This is the field name that will be displayed to the end user.
3. Enter the Parameter Alias. This is the field name that can be used in scripts.
4. Select the field type. If you have selected Lookup, click on the expansion button to select the lookup type.
5. If you want the input field to be required, mark the Required checkbox.
6. Click on the Save button.

To edit an input field:

1. Select the input field that you want to edit from the Input Fields list.
2. Click on the Edit button above the Input Fields list.
3. Enter the new details for the field.
4. Click on the Save button.

To remove an input field:

1. Select the input field that you want to remove from the Input Fields list.
2. Click on the Subtract button above the Input Fields list.
Custom Processes

A custom process runs a Dexterity script. You can add options to a process so end users can select which script will be run.

To add a custom process:

1. Click on the expansion button next to the Process Type field.
2. Select the product that you want to run the custom process in.
3. If you want the user to select the process that will be run, mark the Use Options checkbox.
4. Add options for the process.
5. Click on the Save button.

To add an option:

1. Click on the Add button above the Options list.
2. Enter a name for the option and click on the Save button.
3. Enter parameters for the script.
4. Enter the script. Input fields and parameters will be automatically replaced with each value in the table.

To add a script parameter:

1. Click on the Add button above the Parameters list.
2. Enter the Parameter Name.
3. Select the field from the form used to replace the parameter in the script.
4. Select the parameter type. If you select Read, each instance of the parameter name in the script is replaced by the field value from the form. If you select Write, the value on the form is updated with the value of the field at the end of the script. If you select Read/Write, each parameter is replaced and the value on the form is updated.
5. Click on the Save button.
Range Fields

Range fields allow users to select a range of records to run the process for.

To add a range field:

1. Click on the Add button above the Range Fields list.
2. Select the Field that you want to add as a range.
3. Click on the Save button.

To remove a range field:

1. Select the field that you want to remove from the Range Fields list.
2. Click on the subtract button above the Range Fields list.
Using Processes

After creating a Process, you can test it using the main eXtender window.

To open a Process:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Processes from the eXtender Objects list.
3. Select the Process that you want to open from the eXtender Resources list.
4. Click on the GoTo button and select Use Process or enter CTRL+U
5. If you have entered options for the Process, select the Option that you want to run.
6. If you have entered input fields for the Process, enter values for the fields.
7. If you have entered range fields for the Process, select All or enter the range of values for each field.
8. Click on the Process button.
Modifying an existing Process

You can make changes to a Process using the eXtender Process Setup window.

To modify an existing Process:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Processes from the eXtender Objects list.
3. Select the Process that you want to modify from the eXtender Resources list
4. Click on the Open button or enter \texttt{CTRL}+\texttt{O}.
5. Enter the new information for the Process.
6. Click on the Save button.
Removing Processes

If you don’t need a Process, you can remove it using the eXtender Process Setup window.

To remove a Process:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Processes from the eXtender Objects list.
3. Select the Process that you want to remove from the eXtender Resources list
4. Click on the Open button or enter CTRL+O.
5. Click on the Delete button.
Part 6: Interfaces

This portion of the manual describes how to set up interfaces and post data from eXtender data entry objects to Microsoft Dynamics GP transactions.

The information is divided into the following chapters:

- **Chapter 24, “Journals”,** describes how to set up an interface to post to General Ledger journals.
- **Chapter 25, “Invoices”,** describes how to set up an interface to post to Receivables invoices.
- **Chapter 26, “Vouchers”,** describes how to set up an interface to post to Payables vouchers.
- **Chapter 27, “Timesheets”,** describes how to set up an interface to post to US Payroll timesheets.
- **Chapter 28, “Sales Orders”,** describes how to set up an interface to post to Sales Order Processing documents.
- **Chapter 29, “Purchase Orders”,** describes how to set up an interface to post to Purchase Order Processing purchase orders.
- **Chapter 30, “Inventory”,** describes how to set up an interface to post to Inventory Adjustments, Variances and Transfers.
- **Chapter 31, “Posting”,** describes how to set up and use posting routines to post from eXtender to Microsoft Dynamics GP.
Chapter 24: Journals

This chapter will guide you through the creation of an eXtender Journal. An eXtender Journal is used to create a mapping between an eXtender Form and a General Ledger journal.

This information is divided into the following sections:

- Adding a new Journal interface
- Modifying an existing Journal interface
- Adding Restrictions
- Removing Journal interfaces
- Multicurrency Journals
Adding a new Journal interface

Use the eXtender Journals window to define new Journal interfaces.

To add a new Journal interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Journal interface.
5. Select the Form Type and enter the Form ID to base the Journal interface upon

6. Click the Add Button and select General Ledger
7. Select the Batch Number option:
   - If the Constant option is selected, enter the Batch Number value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Batch Number field

8. Select the Reference option:
   - If the Constant option is selected, enter the Reference value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Reference field

9. Select the Transaction Date option:
   - If the Default option is selected, the transaction date will default to the User Date for one-off transactions and the Scheduled Posting Date for recurring transactions
   - If the eXtender Form Field option is selected, select the Date field

10. Enter distributions for the journal
11. Click on the Save button

To add a distribution:

1. Click on the Add button above the distributions list
2. Enter the account value
3. Select whether the distribution is a debit or a credit
4. Select the Amount option:
   - If the Constant option is selected, enter the Amount value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Amount field
   - If the Balancing Transaction option is selected, the distribution amount will be calculated as the difference between the total debits and total credits
5. Select the Reference option:
   - If the Constant option is selected, enter the Reference value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Reference field
   - If the None option is selected, the Reference for the distribution line will be blank
6. Click on the Save button

To remove a distribution:
1. Select the distribution you want to remove from the distribution list
2. Click on the Remove button above the distribution list

To modify a distribution:
1. Select the distribution you want to modify from the distribution list
2. Click on the Edit button above the distribution list
3. Enter the new information for the distribution
4. Click on the Save button
Modifying an existing Journal interface

You can make changes to a Journal interface using the eXtender Journals window.

To modify an existing Journal interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Journals from the eXtender Objects list.
3. Select the Journal interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Journal interface.
6. Click on the Save button.
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Journal. This does not stop the transaction from being displayed in a Posting window. It stops the journal from being posted at the time of posting.

To add restrictions:

1. Click on the Restrictions button.
2. Click on the Add Restriction button above the Restrictions list.
3. Click on the Add Restriction button above the Restrictions list.
4. Select the field that you want to base the restriction on.
5. Select the restriction type.
6. Enter the value of the restriction.
7. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.
To remove restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Removing Journal interfaces

If you don’t need a Journal interface, you can remove it using the eXtender Journals window.

To remove a Journal interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Journals from the eXtender Objects list.
3. Select the Journal interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Multicurrency Journals

If a journal is based on a multicurrency form or linked form, the currency ID, exchange table and exchange rate for the journal is set to the values entered on the form or linked form. If the form or linked form is not a multicurrency form the functional currency is used.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms and linked forms.
Chapter 25: Invoices

This chapter will guide you through the creation of an eXtender Invoice. An eXtender Invoice is used to create a mapping between an eXtender Form and a Receivables transaction.

This information is divided into the following sections:

- Adding a new Invoice interface
- Modifying an existing Invoice interface
- Setting freight options
- Setting miscellaneous options
- Adding Restrictions
- Setting account options
- Removing Invoice interfaces
- Multicurrency Invoices
Adding a new Invoice interface

Use the eXtender Invoices window to define new Invoice interfaces.

To add a new Invoice interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Invoice interface.
5. Select the Form Type and enter the Form ID to base the Invoice interface upon.
6. Click on the Add Button and select Receivables Management.
7. Select the Receivables Management Document Type.
8. Select the Document Number option:
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the Document Number field.
   - If the Separate Series option is selected, enter the Next Document Number value. This value will increment with each invoice created.
   - If the Receivables option is selected, the Document Number will default from the Next Document Number in the Receivables Management setup.
9. Select the Batch Number option:
• If the Constant option is selected, enter the Batch Number value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Batch Number field

10. Select the Description option:
• If the Constant option is selected, enter the Description value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Description field

11. Select the Customer Number option:
• If the Constant option is selected, enter the Customer Number value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Customer Number field.

12. Select the Address ID option:
• If the Constant option is selected, enter the Address ID value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Address ID field
• If the Main Address, Bill To Address, Ship To Address, or Statement To Address option is selected, the Address ID will be defaulted from the relevant address on the customer record

13. Select the Salesperson ID option:
• If the Constant option is selected, enter the Salesperson ID value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Salesperson ID field
• If the Customer option is selected, the Salesperson ID will be defaulted from the customer record
• If the None option is selected, the invoice will not have a salesperson assigned

14. Select the Territory ID option:
• If the Constant option is selected, enter the Territory ID option
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Territory ID field
• If the Customer option is selected, the Territory ID will be defaulted from the customer record
• If the Salesperson option is selected, the Territory ID will be defaulted from the salesperson record
• If the None option is selected, the invoice will not have a sales territory assigned

15. Select the PO Number option:
• If the Constant option is selected, enter the PO Number value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the PO Number field
• If the None option is selected, the invoice will not have a PO Number assigned

16. Select the Document Date option:
• If the Default option is selected, the document date will default to the User Date for one-off transactions and the Scheduled Posting Date for recurring transactions
• If the eXtender Form Field option is selected, select the Date field

17. Select the Cost option:
• If the Constant option is selected, enter the Cost amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Cost field
• If the None option is selected, the invoice will not have a Cost amount assigned

18. Select the Sales option:
• If the Constant option is selected, enter the Sales amount option
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Sales field
• If the Percentage of Cost option is selected, enter the percentage value
• If the None option is selected, the invoice will not have a Sales amount assigned

19. Select the Freight option:
• If the Constant option is selected, enter the Freight amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Freight field
• If the Percentage of Cost or Percentage of Sales option is selected, enter the percentage value
• If the None option is selected, the invoice will not have a Freight amount assigned

20. Select the Miscellaneous option:

• If the Constant option is selected, enter the Miscellaneous amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Miscellaneous field
• If the Percentage of Cost or Percentage of Sales option is selected, enter the percentage value
• If the None option is selected, the invoice will not have Miscellaneous amount assigned

21. Click on the Save button.
Modifying an existing Invoice interface

You can make changes to an Invoice interface using the eXtender Invoices window.

To modify an existing Invoice interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Invoices from the eXtender Objects list.
3. Select the Invoice interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Invoice interface
6. Click on the Save button
Setting freight options

Use the Freight Options window to set the maximum and minimum freight amounts. If the maximum freight amount is zero, there is no maximum freight amount.

To set freight options:

1. Click on the expansion button on the Freight line

![Freight Options Window]

2. Enter the Minimum Freight value
3. Enter the Maximum Freight value
4. Click on the Save button
Setting miscellaneous options

Use the Miscellaneous Options window to set the maximum and minimum miscellaneous amounts. If the maximum miscellaneous amount is zero, there is no maximum miscellaneous amount.

To set miscellaneous options:

1. Click on the expansion button on the Miscellaneous line

2. Enter the Minimum Miscellaneous value
3. Enter the Maximum Miscellaneous value
4. Click on the Save button
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Invoice. This does not stop the transaction from being displayed in a Posting window. It stops the invoice from being posted at the time of posting.

To add restrictions:

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.
To remove restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Setting account options

You can use the Accounts window to specify where each distribution account for the transaction is defaulted from.

To set account options:

1. Click on the Accounts button.

2. For each of the distributions, select the Account method.
   a. If Constant is selected as the Account method, enter the account number.
   b. If eXtender Form Field is selected as the Account method, select the Account field.
   c. If Default if selected as the Account method, the account will be the Microsoft Dynamics GP default.

3. Click on the Save button.
Removing Invoice interfaces

If you don’t need an Invoice interface, you can remove it using the eXtender Invoices window.

To remove an Invoice interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Invoices from the eXtender Objects list.
3. Select the Invoice interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Multicurrency Invoices

If an invoice is based on a multicurrency form or linked form, the currency ID, exchange table and exchange rate for the receivables transaction is set to the values entered on the form or linked form. If the form or linked form is not a multicurrency form the currency from the customer on the receivables transaction is used.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms and linked forms.
Chapter 26: Vouchers

This chapter will guide you through the creation of an eXtender Voucher. An eXtender Voucher is used to create a mapping between an eXtender Form and a Payables transaction.

This information is divided into the following sections:

- Adding a new Voucher interface
- Modifying an existing Voucher interface
- Setting freight options
- Setting miscellaneous options
- Adding Restrictions
- Setting account options
- Removing Voucher interfaces
- Multicurrency Vouchers
Adding a new Voucher interface

Use the eXtender Vouchers window to define new Voucher interfaces.

To add a new Voucher interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Voucher interface.
5. Enter the Form Type and Form ID to base the Voucher interface upon.
6. Click the Add Button and select Payables Management.
7. Select the Batch Number option:
   - If the Constant option is selected, enter the Batch Number value.
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the Batch Number field.
8. Select the Voucher Number option:
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the Voucher Number field.
• If the Separate Series option is selected, enter the Next Voucher Number value. This value will increment with each voucher created.
• If the Payables option is selected, the Voucher Number will default from the Next Voucher Number in the Payables Management setup.

9. Select the Description option:
• If the Constant option is selected, enter the Description value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Description field

10. Select the Vendor ID option:
• If the Constant option is selected, enter the Vendor ID value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Vendor ID field

11. Select the Address ID option:
• If the Constant option is selected, enter the Address ID value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Primary Address, Purchase Address, Ship From Address, or Remit To Address option is selected, the Address ID will be defaulted from the relevant address on the vendor record

12. Select the Document Number option:
• If the Constant option is selected, enter the Document Number value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Document Number field

13. Select the PO Number option:
• If the Constant option is selected, enter the PO Number value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the PO Number field
• If the None option is selected, the voucher will not have a PO Number assigned

14. Select the Document Date option:
If the Default option is selected, the document date will default to the User Date for one-off transactions and the Scheduled Posting Date for recurring transactions

- If the eXtender Form Field option is selected, select the Date field

15. Select the Purchases option:

- If the Constant option is selected, enter the Purchases amount value
- If the Calculation option is selected, click on the Calculation button and enter the calculation
- If the eXtender Form Field option is selected, select the Purchases field
- If the None option is selected, the voucher will not have a Purchase amount assigned

16. Select the Freight option:

- If the Constant option is selected, enter the Freight amount value
- If the Calculation option is selected, click on the Calculation button and enter the calculation
- If the eXtender Form Field option is selected, select the Freight field
- If the Percentage of Purchases option is selected, enter the percentage value
- If the None option is selected, the voucher will not have a Freight amount assigned

17. Select the Miscellaneous option:

- If the Constant option is selected, enter the Miscellaneous amount value
- If the Calculation option is selected, click on the Calculation button and enter the calculation
- If the eXtender Form Field option is selected, select the Miscellaneous field
- If the Percentage of Purchases option is selected, enter the percentage value
- If the None option is selected, the voucher will not have a Miscellaneous amount assigned
18. Click on the Save button.
Modifying an existing Voucher interface

You can make changes to a Voucher interface using the eXtender Vouchers window.

To modify an existing Voucher interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Vouchers from the eXtender Objects list.
3. Select the Voucher interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTR + O.
5. Enter the new information for the Voucher interface
6. Click on the Save button
Setting freight options

Use the Freight Options window to set the maximum and minimum freight amounts. If the maximum freight amount is zero, there is no maximum freight amount.

To set freight options:

1. Click on the expansion button on the Freight line

2. Enter the Minimum Freight value
3. Enter the Maximum Freight value
4. Click on the Save button
Setting miscellaneous options

Use the Miscellaneous Options window to set the maximum and minimum miscellaneous amounts. If the maximum miscellaneous amount is zero, there is no maximum miscellaneous amount.

To set miscellaneous options:

1. Click on the expansion button on the Miscellaneous line
2. Enter the Minimum Miscellaneous value
3. Enter the Maximum Miscellaneous value
4. Click on the Save button
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Voucher. This does not stop the interface from being displayed in a Posting window. It stops the voucher from being posted at the time of posting.

To add restrictions:

1. Click on the Restrictions button.

![Restrictions Window]

2. Click on the Add Restriction button above the Restrictions list.

![Add Restriction Window]

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.
To remove restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Setting account options

You can use the Accounts window to specify where each distribution account for the transaction is defaulted from.

To set account options:

1. Click on the Accounts button.

2. For each of the distributions, select the Account method.
   a. If Constant is selected as the Account method, enter the account number.
   b. If eXtender Form Field is selected as the Account method, select the Account field.
   c. If Default if selected as the Account method, the account will be the Microsoft Dynamics GP default.

3. Click on the Save button.
Removing Voucher interfaces

If you don’t need a Voucher interface, you can remove it using the eXtender Vouchers window.

*To remove a Voucher interface:*

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Vouchers from the eXtender Objects list.
3. Select the Voucher interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter `CTRL + O`.
5. Click on the Delete button.
Multicurrency Vouchers

If a voucher is based on a multicurrency form or linked form, the currency ID, exchange table and exchange rate for the payables transaction is set to the values entered on the form or linked form. If the form or linked form is not a multicurrency form the currency from the vendor on the payables transaction is used.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms and linked forms.
Chapter 28: Sales Orders

This chapter will guide you through the creation of an eXtender Sales Order. An eXtender Sales Order is used to create a mapping between an eXtender Detail Form and a Sales Order Processing document.

This information is divided into the following sections:

- Adding a new Sales Order interface
- Modifying an existing Sales Order interface
- Setting Sales Order interface options
- Setting customer options
- Setting inventory item options
- Setting freight options
- Setting miscellaneous options
- Adding Restrictions
- Setting account options
- Removing Sales Order interfaces
- Multicurrency Sales Orders
Adding a new Sales Order interface

Use the eXtender Sales Orders window to define new Sales Order interfaces.

To add a new Sales Order interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Sales Order interface.
5. Enter the Form Type and Form ID to base the Sales Order interface upon.
6. Click on the Add button and select Sales Order Processing.
7. Select the Type and Type ID of the Sales document.
8. Select the Batch option:
   - If the Constant option is selected, enter the Batch value.
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the Batch field.
- If the Calculation option is selected, click on the Calculation button and enter the calculation.
- If the eXtender Form Field option is selected, select the Document field.
- If the Separate Series option is selected, enter the Next Document Number value. This value will increment with each document created.
- If the Sales Order Processing option is selected, the Document Number will default from the Next Document Number in the Sales Order Processing setup.

10. Select the Customer Number option:
- If the Constant option is selected, enter the Customer Number value.
- If the Calculation option is selected, click on the Calculation button and enter the calculation.
- If the eXtender Form Field option is selected, select the Customer Number field.

11. Select the Site ID option:
- If the Constant option is selected, enter the Site ID value.
- If the Calculation option is selected, click on the Calculation button and enter the calculation.
- If the eXtender Form Field option is selected, select the Site ID field.

12. Select the PO Number option:
- If the Constant option is selected, enter the PO Number value.
- If the Calculation option is selected, click on the Calculation button and enter the calculation.
- If the eXtender Form Field option is selected, select the PO Number field.
- If the None option is selected, the Sales document will not have a PO Number assigned.

13. Select the Document Date option:
- If the Default option is selected, the document date will default to the User Date for one-off transactions and the Scheduled Posting Date for recurring transactions.
- If the eXtender Form Field option is selected, select the Date field.

14. Select the Item option:
- If the Constant option is selected, enter the Item Number value.
- If the Calculation option is selected, click on the Calculation button and enter the calculation.
- If the eXtender Form Field option is selected, select the Item Number field.

15. Select the Quantity option:
• If the Constant option is selected, enter the Quantity amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Quantity field

16. Select the Unit Cost option:
• If the Constant option is selected, enter the Unit Cost amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Unit Cost field
• If the Standard Cost or Unit Cost option is selected, the Unit Cost will be defaulted from the relevant cost field of the item record
• If the None option is selected, the Sales document line items will not have the Unit Cost assigned

17. Select the Unit Price option:
• If the Constant option is selected, enter the Unit Price amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Unit Price field
• If the Percentage of Cost option is selected, enter the percentage value
• If the List Price option is selected, the Unit Price will be defaulted from the list price of the item record
• If the Standard Price option is selected, the Unit Price will be defaulted from the item Price List based on values from the customer and item records
• If the None option is selected, the Sales document line items will not have the Unit Price assigned

18. Select the Freight option:
• If the Constant option is selected, enter the Freight amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Freight field
• If the Percentage of Cost or Percentage of Sales option is selected, enter the percentage value
• If the None option is selected, the Sales document will not have a Freight amount assigned

19. Select the Miscellaneous option:
• If the Constant option is selected, enter the Miscellaneous amount value
• If the Calculation option is selected, click on the Calculation button and enter the calculation.
• If the eXtender Form Field option is selected, select the Miscellaneous field.
• If the Percentage of Cost or Percentage of Sales option is selected, enter the percentage value.
• If the None option is selected, the Sales document will not have a Miscellaneous amount assigned.

20. Click on the Save button.
Modifying an existing Sales Order interface

You can make changes to the Sales Order interface using the eXtender Sales Orders window.

To modify an existing Sales Order interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Sales Orders from the eXtender Objects list.
3. Select the Sales Order interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRLO.
5. Enter the new information for the Sales Order interface
6. Click on the Save button
Setting Sales Order interface options

Use the Options window to select the commission and trade discount calculations and assign the GL Reference and Comment ID methods.

To set Sales Order interface options:

1. Click on the Options button.

2. Mark the Calculate Commissions option if you want commissions to be calculated for the Sales Order document.
3. Mark the Allow Trade Discounts option if you want trade discounts to be calculated for the Sales Order document.
4. Select the GL Reference option
   - If the Constant option is selected, enter the GL Reference value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the GL Reference field
   - If the None option is selected, the Sales document will not have a GL Reference assigned
5. Select the Comment ID option
   - If the Constant option is selected, enter the Comment ID value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Comment ID field
   - If the None option is selected, the Sales document will not have a Comment ID assigned

6. Click on the Save button
Setting customer options

Use the Customer Options window to set fields relevant to the customer on the Sales Order Processing transaction.

To set customer options:

1. Click on the expansion button on the Customer Number line

2. Select the Customer Name option
   - If the Constant option is selected, enter the Customer Name value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Customer Name field
   - If the Customer option is selected, the Customer Name will be defaulted from the customer record

3. Select the Salesperson option
   - If the Constant option is selected, enter the Salesperson value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Salesperson field
   - If the Customer option is selected, the Salesperson will be defaulted from the customer record

4. Select the Sales Territory option
   - If the Constant option is selected, enter the Sales Territory value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Sales Territory field
   - If the Salesperson option is selected, the Sales Territory will be defaulted from the salesperson record
   - If the Customer option is selected, the Sales Territory will be defaulted from the customer record
5. Select the Bill To Address option
   - If the Constant option is selected, enter the Bill To Address value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Bill To Address field
   - If the Main Address, Bill To Address, Ship To Address, or Statement To Address option is selected, the Address ID will be defaulted from the relevant address on the customer record

6. Select the Ship To Address option
   - If the Constant option is selected, enter the Bill To Address value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Bill To Address field
   - If the Main Address, Bill To Address, Ship To Address, or Statement To Address option is selected, the Address ID will be defaulted from the relevant address on the customer record

7. Click on the Save button
Setting inventory item options

Use the Item Options window to set fields relevant to the inventory item on each line of the Sales Order Processing transaction.

To set inventory options:

1. Click on the expansion button on the Item line

2. Select the Description option
   - If the Constant option is selected, enter the Description value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Description field
   - If the Item option is selected, the Description will be defaulted from the item record

3. Select the Markdown option
   - If the Constant Amount option is selected, enter the Markdown Amount value
   - If the Constant Percentage option is selected, enter the Markdown Percentage value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation for the Markdown Amount
   - If the eXtender Form Field option is selected, select the Markdown Amount field
   - If the None option is selected, the Sales Order document line item will not have a Markdown Amount assigned

4. Select the Comment option
   - If the Constant option is selected, enter the Comment value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Comment field
• If the None option is selected, the Sales Order document line item will not have a Comment assigned

5. Select the Salesperson option

• If the Constant option is selected, enter the Salesperson value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Salesperson field
• If the Header option is selected, the Salesperson on Sales Order document line item will be defaulted from the Salesperson on the Sales Order document header record
• If the Customer option is selected, the Salesperson on Sales Order document line item will be defaulted from the customer record

6. Select the Sales Territory option

• If the Constant option is selected, enter the Sales Territory value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Sales Territory field
• If the Header option is selected, the Sales Territory on Sales Order document line will be defaulted from the Sales Territory on the Sales Order document header record
• If the Header Salesperson option is selected, the Sales Territory on Sales Order document line item will be defaulted from the Salesperson record on the Sales Order document header
• If the Line Salesperson option is selected, the Sales Territory on the Sales Order document line will be defaulted from the Salesperson record on the Sales Order document header
• If the Customer option is selected, the Sales Territory on Sales Order document line item will be defaulted from the customer record

7. Select the Ship To Address option

• If the Constant option is selected, enter the Ship To Address value
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Ship To Address field
• If the Header option is selected, the Ship To Address on the Sales Order document line will be defaulted from the Ship To Address on the Sales Order document header record
If the Main Address, Bill To Address, Ship To Address, or Statement To Address option is selected, the Address ID will be defaulted from the relevant address on the customer record.

8. Select the Site option
   - If the Constant option is selected, enter the Site value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Site field
   - If the Header option is selected, the Site on the Sales Order document line will be defaulted from the Site on the Sales Order document header record

9. Click on the Save button
Setting freight options

Use the Freight Options window to set the maximum and minimum freight amounts. If the maximum freight amount is zero, there is no maximum freight amount.

To set freight options:

1. Click on the expansion button on the Freight line

![Freight Options window]

2. Enter the Minimum Freight value
3. Enter the Maximum Freight value
4. Click on the Save button
Setting miscellaneous options

Use the Miscellaneous Options window to set the maximum and minimum miscellaneous amounts. If the maximum miscellaneous amount is zero, there is no maximum miscellaneous amount.

To set miscellaneous options:

1. Click on the expansion button on the Miscellaneous line

![Misc Options Window]

2. Enter the Minimum Miscellaneous value
3. Enter the Maximum Miscellaneous value
4. Click on the Save button
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Sales Order. This does not stop the interface from being displayed in a Posting window. It stops the sales order from being posted at the time of posting.

*To add restrictions:*

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

*To modify existing restrictions:*

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.
To remove restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Setting account options

You can use the Accounts window to specify where each distribution account for the transaction is defaulted from.

To set account options:

1. Click on the Accounts button.

2. For each of the distributions, select the Account method.
   a. If Constant is selected as the Account method, enter the account number.
   b. If eXtender Form Field is selected as the Account method, select the Account field.
   c. If Default if selected as the Account method, the account will be the Microsoft Dynamics GP default.

3. Click on the Save button.
Removing Sales Order interfaces

If you don't need a Sales Order interface, you can remove it using the eXtender Sales Orders window.

*To remove a Sales Order interface:*

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Sales Orders from the eXtender Objects list.
3. Select the Sales Orders interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
**Multicurrency Sales Orders**

If a sales order is based on a multicurrency form, detail form or linked form, the currency ID, exchange table and exchange rate for the sales transaction is set to the values entered on the form, detail form or linked form. If the form, detail form or linked form is not a multicurrency form the currency from the customer on the sales transaction is used.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms, detail forms and linked forms.
Chapter 29: Purchase Orders

This chapter will guide you through the creation of an eXtender Purchase Order. An eXtender Purchase Order is used to create a mapping between an eXtender Detail Form and a Purchase Order Processing document.

This information is divided into the following sections:

- Adding a new Purchase Order interface
- Modifying an existing Purchase Order interface
- Setting freight options
- Setting miscellaneous options
- Adding Restrictions
- Removing Purchase Order interfaces
- Multicurrency Purchase Orders
Adding a new Purchase Order interface

Use the eXtender Purchase Orders window to define new Purchase Order interfaces.

To add a new Purchase Order interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Purchase Order interface.
5. Enter the Form Type and Form ID to base the Purchase interface upon.
6. Click the Add button and select Purchase Order Processing.

7. Select the PO Number option:
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the PO Number field.
   - If the Separate Series option is selected, enter the Next PO Number value. This value will increment with each purchase order created.
   - If the Purchase Orders option is selected, the PO Number is defaulted from the Next PO Number in the Purchase Orders setup.

8. Select the Vendor ID option:
9. Select the Buyer ID option:
   - If the Constant option is selected, enter the Buyer ID value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Buyer ID field
   - If the None option is selected, the Purchase Order will not have a Buyer ID assigned

10. Select the Document Date option:
    - If the Default option is selected, the document date will default to the User Date for one-off transactions and the Scheduled Posting Date for recurring transactions
    - If the eXtender Form Field option is selected, select the Date field

11. Select the Item option:
    - If the Constant option is selected, enter the Item Number value
    - If the Calculation option is selected, click on the Calculation button and enter the calculation
    - If the eXtender Form Field option is selected, select the Item Number field

12. Select the Quantity option:
    - If the Constant option is selected, enter the Quantity amount value
    - If the Calculation option is selected, click on the Calculation button and enter the calculation
    - If the eXtender Form Field option is selected, select the Quantity field

13. Select the Unit Cost option:
    - If the Constant option is selected, enter the Unit Cost amount value
    - If the Calculation option is selected, click on the Calculation button and enter the calculation
    - If the eXtender Form Field option is selected, select the Unit Cost field
    - If the Standard Cost or Current Cost option is selected, the Unit Cost will be defaulted from the relevant cost field on the item record
    - If the None option is selected, the Purchase Order line items will not have Unit Cost amounts assigned
14. Select the Site option:
   - If the Constant option is selected, enter the Site ID value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Site ID field

15. Select the Freight option:
   - If the Constant option is selected, enter the Freight amount value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Freight field
   - If the Percentage of Cost option is selected, enter the percentage amount
   - If the None option is selected, the Purchase Order will not have a Freight amount assigned

16. Select the Miscellaneous option:
   - If the Constant option is selected, enter the Miscellaneous amount value
   - If the Calculation option is selected, click on the Calculation button and enter the calculation
   - If the eXtender Form Field option is selected, select the Miscellaneous field
   - If the Percentage of Cost option is selected, enter the percentage amount
   - If the None option is selected, the Purchase Order will not have a Miscellaneous amount assigned

17. Click on the Save button.
Modifying an existing Purchase Order interface

You can make changes to a Purchase Order interface using the eXtender Purchase Orders window.

To modify an existing Purchase Order interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Purchase Orders from the eXtender Objects list.
3. Select the Purchase Order interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Purchase Order interface
6. Click on the Save button
Setting freight options

Use the Freight Options window to set the maximum and minimum freight amounts. If the maximum freight amount is zero, there is no maximum freight amount.

To set freight options:

1. Click on the expansion button on the Freight line
2. Enter the Minimum Freight value
3. Enter the Maximum Freight value
4. Click on the Save button
Setting miscellaneous options

Use the Miscellaneous Options window to set the maximum and minimum miscellaneous amounts. If the maximum miscellaneous amount is zero, there is no maximum miscellaneous amount.

To set miscellaneous options:

1. Click on the expansion button on the Miscellaneous line

2. Enter the Minimum Miscellaneous value
3. Enter the Maximum Miscellaneous value
4. Click on the Save button
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Purchase Order. This does not stop the interface from being displayed in a Posting window. It stops the purchase order from being posted at the time of posting.

To add restrictions:

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.

To remove restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Removing Purchase Order interfaces

If you don’t need a Purchase Order interface, you can remove it using the eXtender Purchase Orders window.

To remove a Purchase Order interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Purchase Orders from the eXtender Objects list.
3. Select the Purchase Order interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Multicurrency Purchase Orders

If a purchase order is based on a multicurrency form, detail form or linked form, the currency ID, exchange table and exchange rate for the purchase order is set to the values entered on the form, detail form or linked form. If the form, detail form or linked form is not a multicurrency form the currency from the vendor on the purchase order is used.

See Chapter 16, “Multicurrency”, for more details on setting up multicurrency forms, detail forms and linked forms.
Chapter 30: Inventory

This chapter will guide you through the creation of an eXtender Inventory Transaction. An eXtender Inventory Transaction is used to create a mapping between an eXtender Form or Detail Form and an Inventory Adjustment, Variance or Transfer.

This information is divided into the following sections:

- Adding a new Inventory interface
- Modifying an existing Inventory interface
- Setting account options
- Removing Inventory interfaces
Adding a new Inventory interface

Use the eXtender Inventory window to define new Inventory interfaces.

To add a new Inventory interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Inventory interface.
5. Click on the Add button and select Inventory as the Interface type.
6. Select the Inventory Transaction Type as Adjustment, Variance, or Transfer.
7. Select the Form Type and Form ID of the eXtender Form or Detail Form that you want to base the Inventory interface on.
8. Select the Document Number option:
   - If the Calculation option is selected, click on the Calculation button and enter the calculation.
   - If the eXtender Form Field option is selected, select the Document Number field.
   - If the Separate Series option is selected, enter the Next Document Number value. This value will increment with each inventory transaction created.
   - If the Inventory Control option is selected, the Document Number is defaulted from the Next Adjustment, Variance or Transfer Number in the Inventory setup.
9. Select the Batch Number option.
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Constant option is selected, enter the Batch Number value
• If the eXtender Form Field option is selected, select the Batch Number field

10. Select the Item Number option:
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Constant option is selected, enter the Item Number value
• If the eXtender Form Field option is selected, select the Item Number field

11. Select the Quantity option:
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Constant option is selected, enter the Quantity value
• If the eXtender Form Field option is selected, select the Quantity field

12. Select the Unit Cost option:
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Constant option is selected, enter the Unit Cost value
• If the eXtender Form Field option is selected, select the Unit Cost field
• If the Item option is selected, the Unit Cost will default from the current cost on the inventory item setup

13. Select the From Location option:
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the Constant option is selected, enter the From Location value
• If the eXtender Form Field option is selected, select the Location field

14. If you have selected Transfer as the Transaction Type, select the To Location option:
• If the Calculation option is selected, click on the Calculation button and enter the calculation
• If the eXtender Form Field option is selected, select the Location field
• If the eXtender Form Field option is selected, select the Location field
15. Click on the Save button.
Modifying an existing Inventory interface

You can make changes to an Inventory interface using the eXtender Inventory window.

To modify an existing Inventory interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Inventory from the eXtender Objects list.
3. Select the Inventory interface that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Inventory interface
6. Click on the Save button
Setting account options

You can use the Accounts window to specify where each distribution account for the transaction is defaulted from.

To set account options:

1. Click on the Accounts button.

2. For each of the distributions, select the Account method.
   a. If Constant is selected as the Account method, enter the account number.
   b. If eXtender Form Field is selected as the Account method, select the Account field.
   c. If Default if selected as the Account method, the account will be the Microsoft Dynamics GP default.

3. Click on the Save button.
Removing Inventory interfaces

If you don’t need an Inventory interface, you can remove it using the eXtender Inventory window.

To remove an Inventory interface:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Inventory from the eXtender Objects list.
3. Select the Inventory interface that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 31: Posting

This chapter will guide you through the creation of an eXtender Posting window. A Posting window uses the eXtender Interfaces you have created to post to the relevant Microsoft Dynamics GP transactions.

This information is divided into the following sections:

- Using Posting windows
- Modifying an existing Posting window
- Adding Posting restrictions
- Removing Posting windows
- Process Servers
Using Posting windows

The posting window displayed depends on whether the Quick Posting option has been selected for the Posting.

To open a posting window:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Select the Interface that you want to open from the eXtender Resources list.
4. Click on the GoTo button and select Use Posting or enter CTRL+U
5. If you have Quick Posting enabled, you will be prompted for the posting window that you want to use. Select Quick to use the Quick Posting window. Select Standard to use the standard Posting window.

To post records using the standard Posting window:

1. Mark the records that you want to post. To mark all records, click on the Mark All button. To unmark all records, click on the Unmark All button.
2. Click on the Post button

To post records using the Quick Posting window:

1. Enter the cutoff date. All records with a date before this cutoff date will be posted. The number of records that are going to be posted is displayed in the status field.
2. Click on the Post button.

To drill down to a record:

1. Select the record that you want to drill down to
2. Click on the Zoom button

There are 4 ways to view the records that are to be posted:

- All – all records are shown
- Marked – only records that have been selected are shown
- Unmarked – only records that have not been selected are shown
- Marked by Other Users – only records that have been selected by users other than you are shown

To change the View option:

1. Click on the View button
2. Select the view option.
Modifying an existing Posting window

You can make changes to a Posting window using the eXtender Postings window.

To modify an existing Posting window:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Posting from the eXtender Objects list.
3. Select the Posting window that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Posting window
6. Click on the Save button
Adding Posting restrictions

Use the Restrictions window to add restrictions to stop records from being posted.

To add a posting restriction:

1. Click on the Restrictions button

![Restrictions Window]

2. Click on the Add button above the Restrictions list

![Add Restriction Window]

3. Select the Field to restrict on
4. Select the Restriction Type
5. Enter the Restriction Value
6. Click on the Save button

To remove a posting restriction:

1. Click on the Restrictions button
2. Select the restriction you want to remove from the Restrictions list
3. Click on the Remove button above the Restrictions list

To modify a posting restriction:

1. Click on the Restrictions button
2. Select the restriction you want to modify from the Restrictions list
3. Click on the Edit button above the Restrictions list
4. Enter the new information for the restriction
5. Click on the Save button
Removing Posting windows

If you don't need a Posting window, you can remove it using the eXtender Postings window.

To remove a Posting window:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Interfaces from the eXtender Objects list.
3. Select the Interface window that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Process Servers

If you have process servers registered, you can use the process server functionality to handle eXtender postings.

To set process servers to handle eXtender Postings:

1. Open the DPS Setup window (Tools >> Setup >> System >> Process Server).
2. Select 3rd Party as the Series.
3. Mark the eXtender Interface process as a remote process.
4. Enter the Server/Service ID for the eXtender Posting process.
5. Click on the OK button.
Part 7: Automation

This portion of the manual describes the automation features of eXtender. These features allow Microsoft Dynamics GP users to use the application in a more efficient and more accurate manner.

The information is divided into the following chapters:

- **Chapter 32, “Macros”**, describes how to set up automatically running macros.

- **Chapter 33, “Dialogs”**, describes how to set up reminder messages.

- **Chapter 34, “Logic Routines”**, describes how to add logic to an Extras menu, form event or table event.
Chapter 32: Macros

This chapter will guide you through the creation of an eXtender Macro.

A Microsoft Dynamics GP macro is a recording of each key you pressed or mouse click you made while performing a procedure. An eXtender Macro enhances the Microsoft Dynamics GP macro system by automating the playing of macros.

This information is divided into the following sections:

- Adding a new Macro
- Modifying an existing Macro
- Removing Macros
Adding a new Macro

Use the eXtender Macros window to define new Macros.

To add a new Macro:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Macros from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Macro.
5. Select the Macro file
6. Select the Attach Type
7. Select the Product, Series, Form and Window to link the Macro to
8. If the Attach Type option is Field Exit or Field Entry, select the Field to link the Macro to
9. If the Attach type is Extras Menu Item, select the Hot Key
10. Click on the Save button.
Modifying an existing Macro

You can make changes to a Macro using the eXtender Macros window.

To modify an existing Macro:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Macros from the eXtender Objects list.
3. Select the Macro that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Macro
6. Click on the Save button
Removing Macros

If you don’t need a Macro, you can remove it using the eXtender Macros window.

To remove a Macro:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Macros from the eXtender Objects list.
3. Select the Macro that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 33: Dialogs

This chapter will guide you through the creation of an eXtender Dialog. An eXtender Dialog opens a popup window to present data to the user.

This information is divided into the following sections:

- Adding a new Dialog
- Modifying an existing Dialog
- Removing Dialogs
Adding a new Dialog

Use the eXtender Dialogs window to define new Dialogs.

To add a new Dialog:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Dialogs from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.

4. Enter an ID and Description for the Dialog.
5. Enter the Prompt value
6. Select the Dialog Type
7. If the Dialog Type is Ask, enter values for the Button Prompts
8. Add the Trigger Fields
9. Click on the Save button.

To add a Trigger Field:

1. Click on the Add button above the Trigger Fields list
2. Select the Product, Series, Form, Window and Field to trigger the
dialog from
3. Select the Trigger Method
4. Click on the Save button

To remove a Trigger Field:

1. Select the field you want to remove from the Trigger Fields list
2. Click on the Remove button above the Trigger Fields list

To modify a Trigger Field:

1. Select the field you want to modify from the Trigger Fields list
2. Click on the Edit button above the Trigger Fields list
3. Enter the new information for the trigger field
4. Click on the Save button
Modifying an existing Dialog

You can make changes to a Dialog using the eXtender Dialogs window.

To modify an existing Dialog:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Dialogs from the eXtender Objects list.
3. Select the Dialog that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Dialog
6. Click on the Save button
Removing Dialogs

If you don't need a Dialog, you can remove it using the eXtender Dialogs window.

To remove a Dialog:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Dialogs from the eXtender Objects list.
3. Select the Dialog that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 34: Logic Routines

This chapter will guide you through the creation of an eXtender Logic Routine. A Logic Routine can be used to run a logic script from any Microsoft Dynamics GP form or table event.

This information is divided into the following sections:

- Adding a new Logic Routine
- Modifying an existing Logic Routine
- Removing Logic Routines
Adding a new Logic Routine

You can use the eXtender Logic Routines window to create new Logic Routines.

To add a new Logic Routine:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Dialogs from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter the ID and Description for the Logic Routine.
5. Select the Routine Type.
   a. If Extras Menu or Form is selected as the Routine Type, select the Product, Series and Form.
   b. If Table is selected as the Routine Type, select the Product, Series and Table.
6. Add tasks for the Logic Routine.
7. Click on the Save button.
Modifying an existing Logic Routine

You can make changes to a Logic Routine using the eXtender Logic Routines window.

To modify an existing Logic Routine:

1. Open the eXtender window (Tools >> eXtender >> eXtender).
2. Select Logic Routines from the eXtender Objects list.
3. Select the Logic Routine that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Logic Routine.
6. Click on the Save button.
Removing Logic Routines

If you don’t need a Logic Routine, you can remove it using the eXtender Logic Routines window.

To remove a Logic Routine:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Logic Routines from the eXtender Objects list.
3. Select the Logic Routine that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Part 8: Reporting

This portion of the manual describes the reporting functions of eXtender.

The information is divided into the following chapters:

- **Chapter 35, “Column Reports”**, describes how to create a report that displays eXtender data in a column format.
- **Chapter 36, “Report Groups”**, describes how to create a new report printing window.
- **Chapter 37, “Mail Merges”**, describes how to create a mail merge from eXtender data entry objects.
- **Chapter 38, “Email Merges”**, describes how to create an email merges from eXtender data entry objects.
- **Chapter 39, “Views”**, describes how to create a SQL view that combines eXtender and Microsoft Dynamics GP data for external reporting.
Chapter 35: Column Reports

This chapter will guide you through the creation of an eXtender Column Report.

This information is divided into the following sections:

- Adding a new Column Report
- Modifying an existing Column Report
- Removing Column Reports
Adding a new Column Report

Use the eXtender Column Reports window to define new Column Reports.

To add a new Column Report:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Column Reports from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Column Report.
5. Select the eXtender Type and enter the Form ID to base the report upon.
6. Select the number of columns.
7. Select the column fields. If the field is a numeric field, mark the Show Total option to display a total of the field at the bottom of the report.

If the search is based on a multicurrency form, only functional currency fields can be totaled.

8. Click on the Save button.

You can only print a column report by adding it to a Report Group. See Chapter 31, “Report Groups” for more information.
Modifying an existing Column Report

You can make changes to a Column Reports using the eXtender Column Reports window.

To modify an existing Column Report:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Column Reports from the eXtender Objects list.
3. Select the Column Report that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Column Report
6. Click on the Save button
Removing Column Reports

If you don't need a Column Report, you can remove it using the eXtender Column Reports window.

To remove a Column Report:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Column Reports from the eXtender Objects list.
3. Select the Column Report that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 36: Report Groups

This chapter will guide you through the creation of an eXtender Report Group.

This information is divided into the following sections:

- Adding a new Report Group
- Using Report Groups
- Modifying an existing Report Group
- Removing Report Groups
Adding a new Report Group

Use the eXtender Report Groups window to define new Report Groups.

To add a new Report Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Report Groups from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Report Group.
5. Select the Reports to include in the Report Group.
6. Click on the Save button.
Using Report Groups

To open a report window:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Report Groups from the eXtender Objects list
3. Select the Report Group that you want to open from the eXtender Resources list
4. Click on the GoTo button and select Use Report Window or enter CTRL+U

To create a report option:

1. Select a report from the Reports list
2. Click on the New button
3. Enter the Option description
4. Select the field in the Sort By list that you want to use to sort the report
5. Add report restrictions
6. Click on the Save button

To add a report restriction:

1. Select the field from the Range list that you want to set a restriction on
2. Enter the To and From values for the restriction
3. Click on the Insert button

To remove a report restriction:

1. Select the restriction that you want to remove from the Restrictions list
2. Click on the Remove button

To modify a report option:

1. Select the report from the Reports list
2. Select the option that you want to modify from the Options list
3. Click on the Modify button
4. Enter the new information for the report option
5. Click on the Save button

To remove a report option:

1. Select the report from the Reports list
2. Select the option that you want to remove from the Options list
3. Click on the Modify button
4. Click on the Delete button

To print report options:

1. Select the report from the Reports list
2. Select the option that you want to print from the Options list
3. Click on the Insert button
4. Repeat steps 1 to 3 until all reports that you want to print are selected
5. Click on the Print button
Modifying an existing Report Group

You can make changes to a Report Group using the eXtender Report Groups window.

To modify an existing Report Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Report Groups from the eXtender Objects list.
3. Select the Report Group that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Report Group
6. Click on the Save button
Removing Report Groups

If you don’t need a Report Group, you can remove it using the eXtender Report Groups window.

To remove a Report Group:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Report Groups from the eXtender Objects list.
3. Select the Report Group that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 37: Mail Merges

This chapter will guide you through the creation of an eXtender Mail Merge. A Mail Merge generates Word documents based on data contained in eXtender Forms, Linked Forms and Detail Forms.

This information is divided into the following sections:

- Adding a new Mail Merge
- Using Mail Merges with Forms, Linked Forms and Detail Forms
- Using Mail Merges with Navigation Lists
- Using Mail Merges with SmartList
- Modifying an existing Mail Merge
- Removing Mail Merges
Adding a new Mail Merge

Use the eXtender Mail Merges window to define new Mail Merges.

To add a new Mail Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Mail Merges from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the Mail Merge.
5. Select the eXtender Type and Form ID to base the Mail Merge upon.
6. Enter the Word Template file.
7. Enter the Merge Text. Insert merge fields as required.
8. Click on the Save button.

To insert a merge field:

1. Move the cursor in the Merge Text field to the point where you want to add the merge field
2. Select the field you want to insert from the Fields list.
3. Click on the Insert button or double click on the field in the Fields list.
Using Mail Merges with Forms, Linked Forms and Detail Forms

You can generate a single mail merge document from a Form, Linked Form or Detail Form window.

To generate a mail merge:

1. Open the Form, Linked Form or Detail Form
2. Enter the ID field values
3. Click on the GoTo button
4. Select the Mail Merge that you want to generate from the Mail Merge list
Using Mail Merges with Navigation Lists

You can generate a mail merge based on the records returned by a Navigation List.

To generate a mail merge:

1. Open the Navigation List that you want to generate the mail merge from
2. Search for and display the records that you want to use for the mail merge
3. Select the mail merge that you want to run from the Actions button.
Using Mail Merges with SmartList

You can generate a mail merge based on the records returned by a SmartList.

To generate a mail merge:

1. Open the SmartList that you want to generate the mail merge from
2. Search for and display the records that you want to use for the mail merge
3. Select a record in the SmartList
4. Click on the GoTo button and select Mail Merges
5. Select the Mail Merge that you want to generate from the Mail Merge list
6. Click on the Select button
Modifying an existing Mail Merge

You can make changes to a Mail Merge using the eXtender Mail Merges window.

To modify an existing Mail Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Mail Merges from the eXtender Objects list.
3. Select the Mail Merge that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the Mail Merge
6. Click on the Save button
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Mail Merge.

To add restrictions:

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Edit Restriction button above the Restrictions list.
4. Enter the new information for the restriction.
5. Click on the Save button.

To remove restrictions:
1. Click on the Restrictions button.
2. Select the restriction that you want to modify from the Restrictions list.
3. Click on the Remove Restriction button above the Restrictions list.
Removing Mail Merges

If you don’t need a Mail Merge, you can remove it using the eXtender Mail Merges window.

To remove a Mail Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Mail Merges from the eXtender Objects list.
3. Select the Mail Merge that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 38: Email Merges

This chapter will guide you through the creation of an eXtender Email Merge. An Email Merge generates emails based on data contained in eXtender Forms, Linked Forms and Detail Forms.

This information is divided into the following sections:

- Adding a new Email Merge
- Using Email Merges with Forms, Linked Forms and Detail Forms
- Using Email Merges with Navigation Lists
- Using Email Merges with SmartList
- Modifying an existing Email Merge
- Setting Email Merge options
- Removing Email Merges
Adding a new Email Merge

Use the eXtender Email Merges window to define new Email Merges.

To add a new Email Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Email Merges from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.

4. Enter an ID and Description for the Email Merge.
5. Select the eXtender Type and Form ID to base the Email Merge upon.
6. Select the Email Field and Recipient Field.
7. Enter the Merge Text. Insert merge fields as required.
8. Click on the Save button.

To insert a merge field:

1. Move the cursor in the Merge Text field to the point where you want to add the merge field
2. Select the field you want to insert from the Fields list.
3. Click on the Insert button or double click on the field in the Fields list.
Using Email Merges with Forms, Linked Forms and Detail Forms

You can generate a single email merge document from a Form, Linked Form or Detail Form window.

To generate an email merge:

1. Open the Form, Linked Form or Detail Form
2. Enter the ID field values
3. Click on the GoTo button
4. Select the Email Merge that you want to generate from the Email Merge list
Using Email Merges with Navigation Lists

You can generate an email merge based on the records returned by a Navigation List.

To generate an email merge:

1. Open the Navigation List that you want to generate the email merge from
2. Search for and display the records that you want to use for the email merge
3. Select the Email Merge that you want to generate from the Actions button
Using Email Merges with SmartList

You can generate an email merge based on the records returned by a SmartList.

To generate an email merge:

1. Open the SmartList that you want to generate the email merge from
2. Search for and display the records that you want to use for the email merge
3. Select a record in the SmartList
4. Click on the GoTo button and select Email Merges
5. Select the Email Merge that you want to generate from the Email Merge list
6. Click on the Select button.
Modifying an existing Email Merge

You can make changes to an Email Merge using the eXtender Email Merges window.

To modify an existing Email Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Email Merges from the eXtender Objects list.
3. Select the Email Merge that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTR + O.
5. Enter the new information for the Email Merge
6. Click on the Save button
Setting Email Merge options

To set Email Merge options:

1. Click on the Options button.

2. Enter the To, Cc and Bcc values.
3. Enter the attachment file.
4. Click on the Save button.
Adding Restrictions

Use the Restrictions window to add fixed restrictions to the Email Merge.

To add restrictions:

1. Click on the Restrictions button.

2. Click on the Add Restriction button above the Restrictions list.

3. Select the field that you want to base the restriction on.
4. Select the restriction type.
5. Enter the value of the restriction.
6. Click on the Save button.

To modify existing restrictions:

6. Click on the Restrictions button.
7. Select the restriction that you want to modify from the Restrictions list.
8. Click on the Edit Restriction button above the Restrictions list.
9. Enter the new information for the restriction.
10. Click on the Save button.

To remove restrictions:
4. Click on the Restrictions button.
5. Select the restriction that you want to modify from the Restrictions list.
6. Click on the Remove Restriction button above the Restrictions list.
Removing Email Merges

If you don't need an Email Merge, you can remove it using the eXtender Email Merges window.

To remove an Email Merge:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Email Merges from the eXtender Objects list.
3. Select the Email Merge that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Chapter 39: Views

This chapter will guide you through the creation of an eXtender View. An eXtender View is used to generate a consolidated view of Microsoft Dynamics GP tables, eXtender Windows, eXtender Forms, eXtender Linked Form and eXtender Detail Forms. It is useful when you want to use eXtender data in external reporting packages such as Crystal Reports. This feature can only be used with SQL or MSDE installs of Microsoft Dynamics GP. You can only use Views when logged in as the system administrator (sa).

This information is divided into the following sections:

- Adding a new View
- Previewing a View
- Modifying an existing View
- Removing Views
Adding a new View

Use the eXtender Views window to define new Views.

To add a new View:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Views from the eXtender Objects list.
3. Click on the New button or enter CTRL+N.
4. Enter an ID and Description for the View.
5. Select the Primary Table
6. Select additional tables.
7. Select fields to include in the view.
8. Click on the Save button.

To select the Primary Table:

1. Click on the Add button.
2. Select the Table Type:
   - If the Type is Microsoft Dynamics GP Table, select the Product, Series and Table.
   - If the Type is eXtender Window, select the Window ID.
   - If the Type is eXtender Form, eXtender Detail Form or extender Linked Form, select the Form ID.

3. Click on the Save button.

To select an additional table:

1. Click on the Add button.

2. Select the table already selected to link the additional table to.

3. Select the Link To Type:
   - If the Type is Microsoft Dynamics GP Table, select the Product, Series and Table.
   - If the Type is eXtender Window, select the Window ID.
   - If the Type is eXtender Form, eXtender Detail Form or extender Linked Form, select the Form ID.

4. Select link fields.

5. Click on the Add button.

To select a link field:

1. Click on the Add button above the Link Fields list.
2. Select the Link From Field.
3. Select the Link To Field.
4. Click on the Add button.

To remove a link field:

1. Select the link that you want to remove from the Link Fields list.
2. Click on the Remove button above the Link Fields list.
Previewing a View

To preview a view:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Views from the eXtender Objects list.
3. Select the View that you want to preview from the eXtender Resources list.
4. Click on the GoTo button and select Preview View.

Modifying an existing View

You can make changes to a View using the eXtender Views window.

To modify an existing View:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Views from the eXtender Objects list.
3. Select the View that you want to modify from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Enter the new information for the View
6. Click on the Save button
Removing Views

If you don't need a View, you can remove it using the eXtender Views window.

To remove a View:

1. Open the eXtender window (Tools >> eXtender >> eXtender)
2. Select Views from the eXtender Objects list.
3. Select the View that you want to remove from the eXtender Resources list.
4. Click on the Open button or enter CTRL + O.
5. Click on the Delete button.
Part 9: Maintenance

This portion of the manual describes the maintenance operations that can be performed on eXtender.

The information is divided into the following chapters:

- **Chapter 40, “Check Links”**, describes how to repair damaged data in eXtender.
- **Chapter 41, “Check Scripts”**, describes how to check the compile status of logic scripts.
- **Chapter 42, “Edit Values”**, describes how to mass modify eXtender data.
- **Chapter 43, “Options”**, describes the setup options that control the operation of eXtender.
- **Chapter 44, “Home Page”**, describes how eXtender objects can be added to the Microsoft Dynamics GP Home Page.
Chapter 40: Check Links

This chapter describes how to check links in eXtender. Checking links examines tables, checking corresponding information in related tables and, if possible, changing the damaged data to match the corresponding data in an undamaged table.

This information is divided into the following sections:

- Checking Links
Checking Links

eXtender uses a separate window from the Microsoft Dynamics GP Check Links window to check links.

To check links:

1. Open the main eXtender window.
2. Select the Extras >> Maintenance >> Check Links to open the eXtender Check Links window.
3. Select the eXtender Objects for which you want to check links.
4. Click on the OK button to start the Check Links routines that have been selected. A report will print displaying the results.
Chapter 41: Check Scripts

This chapter describes how to check logic scripts. This routine is run when upgrading between versions of Microsoft Dynamics GP, eXtender or other third party products to check that logic scripts will still run.

This information is divided into the following sections:

- Checking Scripts
Checking Scripts

To check scripts:

1. Open the main eXtender window
2. Select Extras >> Maintenance >> Check Scripts.
3. If there are any errors in the Logic scripts, a report will be printed displaying the errors.
Chapter 42: Edit Values

This chapter describes how to mass modify eXtender data.

This information is divided into the following sections:

- Editing Values
- Filling Values
- Changing Values
Editing Values

You can use the Edit Values window to manually change field values for a field type.

To edit field values:

1. Open the eXtender main window
2. Select the eXtender object and resource that you want to edit values for
3. Select Edit All Records from the GoTos button list to open the Edit eXtender Records window.

4. Select the field to edit from the Record Values button list
5. Enter new values for the field
6. Click on the Save button to commit the changes.

Field values are not changed until the Save button is clicked. If you do not click on the Save button, field values will not be updated.
Filling Values

You can use the Edit Values window to fill the value of a field for all records.

To fill field values:

1. Open the eXtender main window
2. Select the eXtender object and resource that you want to edit values for
3. Select Edit All Records from the GoTos button list to open the Edit eXtender Records window.
4. Select the field to edit from the Record Values button list
5. Click on the Fill button to open the Fill Records window

6. Select the Fill Type. Select All Records if you want to update the values of the field for all records. Select Only Empty Records if you only want to set the values of fields that do not already have a value entered.
7. Enter the value to set the field
8. Click on the Fill button
9. Click on the Save button to commit the changes
Changing Values

You can use the Edit Values window to change the value of a field from one value to another for all records.

To change field values:

1. Open the eXtender main window
2. Select the eXtender object and resource that you want to edit values for
3. Select Edit All Records from the GoTos button list to open the Edit eXtender Records window.
4. Select the field to edit from the Record Values button list
5. Click on the Change button to open the Change Records window
6. Enter the field value to change the field from and the field value to change to field to
7. Click on the Change button
8. Click on the Save button to commit the changes
Chapter 43: Options

This chapter describes the options that can be set in eXtender.

This information is divided into the following sections:

- Setting Options
- Save Calculated Fields
- Auto-update SmartList
- Display ID fields as descriptions
- Use Outlook for Email Merges
- Write back unused field IDs
- Refresh open Navigation List windows
Setting Options

You can use the eXtender Options window to set options for eXtender.

To set options:

1. Open the eXtender Options window (Tools >> eXtender >> Options).

2. Mark the options that you want to set and unmark the options that you want to clear.
3. Click on the OK button to save the changes.
Save Calculated Fields

If this option is set, the value of all calculated fields on the form, linked form or detail form will be saved when the record is posted.

If this option is cleared, the calculated field will be recalculated even after the record has been posted.
Auto-update SmartList

If this option is set, eXtender will automatically check for new SmartList objects and SmartList integrations, and changes in eXtender SmartList objects and SmartList integrations each time SmartList is opened. If new or changed objects or integrations are detected, SmartList will be automatically updated to reflect these changes.

If this option is cleared, eXtender will not check for new or changed SmartList objects or integrations. Clearing this option will make SmartList open faster.
Display ID fields as descriptions

If this option is set, the description value of lookup fields will be displayed instead of the ID value in eXtender Navigation Lists.

If this option is cleared, the ID value will be displayed for lookup fields.
Use Outlook for Email Merges

If this option is set, eXtender will use Outlook to send email merges in HTML format. To use the HTML features, you must enter HTML tags in the merge text to format the email.

If this option is cleared, eXtender will use MAPI to send email merges. The format of the email will be plain text.
Write back unused field IDs

If this option is set, the Next Field ID value for auto-incrementing Field IDs on forms and detail forms will be reset when a record is cancelled or deleted.

If this option is cleared, the Next Field ID is not reset.
Refresh open Navigation List windows

If this option is set, eXtender Navigation Lists will be automatically refreshed when a new record is saved or an existing record is updated.

If this option is cleared, eXtender Navigation Lists must be manually refreshed when eXtender records are saved or updated.
Chapter 44: Home Page

This chapter describes how eXtender objects can be added to the Microsoft Dynamics GP home page.

This information is divided into the following sections:

- Quick Links
- Reminders
Quick Links

Quick Links are used on the home page to display a list of Microsoft Dynamics GP forms that are most commonly used. You can add eXtender Forms, Detail Forms, Linked Forms, Navigation Lists, Report windows, Posting windows and Import windows to the Quick Links of your home page.

To add an eXtender object as a Quick Link:

1. Open your home page.
2. Click on the Customize this page button.
3. Click on the expansion button next to the Quick Links option.
4. Select eXtender from the Add button list.
5. Select the Object and Command that you want to add as a Quick Link.
6. Click on the OK button.
7. Click on the OK button.
8. Click on the OK button.
Reminders

Custom Reminders are displayed in the To Do section of the home page. These reminders are based on SmartList objects and all eXtender Forms, Detail Forms, and Linked Forms that have been created as SmartLists can also be used to create a custom reminder.

Please refer to the Microsoft Dynamics GP documentation for more information on creating custom reminders.
Chapter 45: Adding eXtender fields to Report Writer Reports

You can add Extender Window fields to any Report Writer report.

*Only Extender Windows are supported to add to Report Writer. You cannot add data from Extender Notes, Detail Windows, Forms or Detail Forms to Report Writer reports.*

**Adding eXtender Window fields to a Microsoft Dynamics GP report**

Adding an Extender Window field to a Microsoft Dynamics GP report is a simple process of adding a calculated field to the report. Before you add a field to a report, you should make a note of the Window ID, the key field/s for the window and the number of the field that you want to add.

The following instructions are for adding fields from an Extender Window with a single key field.

**To add an Extender Window field to a Microsoft Dynamics GP report:**

2. Select Microsoft Dynamics GP as the Product and click OK.
3. Click Reports to open the Report Writer window.
4. Select the report that you want to modify from the Original Reports list.
5. Click Insert to move the report from the Original Reports list to the Modified Reports list.
7. Click Open to open the Report Definition window.
8. Click the Layout window to open the Report Layout window.
9. If the Toolbox window is not already open, select Layout >> Toolbox to open it.
10. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
11. Enter a Name for the calculated field.
12. Select the Result Type as String.
13. Click the Functions tab and select the User-Defined option.
14. Select System from the Core list and rw_TableHeaderString from the Function list.
   *The rw_TableHeaderString function has five parameters: Product ID, Window ID, String Key Value, Numeric Key Value, and Field Number*
15. Click Add to add the function to the expression string.
16. Select the Constants tab and select Integer as the Type.

17. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.

18. Select String as the Type.

19. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.

20. If the key field for the window is a numeric field, clear the Constant value and click Add to add a blank string to the calculation.

21. Click Fields and select the Table that contains the Key value for the window. Select the Field that contains the Key value. Click Add.

22. Select the Constants tab and select Integer as the type.

23. If the key field for the window is a string field, clear the Value field and click Add to add a zero to the calculation.

24. Enter the number of the field in to the Value field and click Add.

25. Click OK to save the calculated field.

26. Drag the calculated field on to the report.

27. Close the Report Layout window. Click Save.

28. Click OK to close the Report Definition window.

29. Select File >> Microsoft Dynamics to return to Microsoft Dynamics GP.

You will need to set security to the modified report before you will be able to view. Refer to the Microsoft Dynamics GP manual or help file for more information on setting security to modified reports.
Adding eXtender Window (with multiple keys) fields to a Microsoft Dynamics GP report

The process for adding fields from an Extender window with multiple keys is slightly different from a window with a single key.

To add an Extender Window (with multiple keys) field to a Microsoft Dynamics GP report:

2. Select Microsoft Dynamics GP as the Product and click OK.
3. Click Reports to open the Report Writer window.
4. Select the report that you want to modify from the Original Reports list.
5. Click Insert to move the report from the Original Reports list to the Modified Reports list.
7. Click Open to open the Report Definition window.
8. Click the Layout window to open the Report Layout window.
9. If the Toolbox window is not already open, select Layout >> Toolbox to open it.
10. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
11. Enter a Name for the calculated field that will become your key.
12. Select the Result Type as String.

You need to ensure that you have the key fields in the same order they appear in the Extender Window.

13. If one of your key fields is a numeric field you will need to select the Functions tab and select LNG_STR from the Function list to convert it to a string value. If you do not have any numeric key fields, skip to number 16.

14. Click Add to add the function to the expression string.
15. Click Fields and select the Table that contains the first Key value for the window. Select the Field that contains the Key value. Click Add to add to the expression string.

16. Between each field in your key you will need to use the CAT operator to concatenate each of the key fields. Click CAT under the Operators section before adding the next field to the expression.

17. If one of your key fields is a string you will need to select the Functions tab and select STRIP from the Function list to remove the trailing spaces.

18. Click Add to add the function to the expression string.
19. Click Fields and select the Table that contains the Key value(s) for the window. Select the Field that contains the Key value. Click Add to add to the expression string.

20. Repeat steps 16-19 for each string key field.

21. You will now have a concatenated key field that you can use in the upcoming section. An example of how the finished expression may look is shown below:

**Key Calculated Field**

\[
\text{LNG\_STR}(\text{SOP\_LINE\_WORK.Line Item Sequence}) \# \text{STRIP}(\text{SOP\_HDR\_WORK.SOP Number})
\]

22. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.

23. Enter a Name for the calculated field.

24. Select the Result Type as String.

25. Select the Functions tab and select the User-Defined option.

26. Select System from the Core list and rw\_TableHeaderString from the Function list.

*The rw\_TableHeaderString function has five parameters: Product ID, Window ID, String Key Value, Numeric Key Value, and Field Number*

27. Click Add to add the function to the expression string.

28. Select the Constants tab and select Integer as the Type.

29. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.

30. Select String as the Type.

31. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.

32. If the key field for the window is a numeric field, clear the Constant value and click Add to add a blank string to the calculation.

33. Click Fields and select Calculated Fields under Resources. Select the Field that contains the concatenated Key value. Click Add to add to the expression string.

34. Select the Constants tab and select Integer as the type.

35. If the key field for the window is a string field, clear the Value field and click Add to add a zero to the calculation.

36. Enter the number of the field in to the Value field and click Add.

37. An example of how the finished expression may look is shown below:
**Extender Field 1**

FUNCTION_SCRIPT( rw_TableHeaderString 3107 “EXTRA_SOP_INFO” myKeyField 0 1 )

**Extender Field 2**

FUNCTION_SCRIPT( rw_TableHeaderString 3107 “EXTRA_SOP_INFO” myKeyField 0 2 )

38. Click OK to save the calculated field.

39. Drag the calculated field on to the report.

*If you have a report that is using line item sequence numbers you will need to drag the line item sequence field onto the report and make it invisible.*

40. Close the Report Layout window. Click Save.

41. Click OK to close the Report Definition window.

42. Select File >> Microsoft Dynamics GP to return to Microsoft Dynamics GP.

*You will need to set security to the modified report before you will be able to view. Refer to the Microsoft Dynamics GP documentation for more information on setting security to modified reports.*