USER MANUAL

Extender

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Publication date: December 2017

Introduction

Welcome to Extender, a powerful, yet easy to use development application that allows you to store user-defined data to meet your business needs. Extender allows you to build complete applications including new windows, forms, menus, and notes. The resources you create can be linked to Microsoft Dynamics GP and its additional modules, as well as any 3rd party products that might be installed.

Overview

Extender works by "extending" the capabilities of Microsoft Dynamics GP, it is not intended to be used to develop new applications in the same way as other tools. In particular, it is useful for extending the application to manage additional data relative to Microsoft Dynamics GP transactions or master records. Extender allows you to add windows and forms that record the data that isn't otherwise captured by Microsoft Dynamics GP. If you have Extender Enterprise, you can also add logic to Windows and Form to perform tasks set criteria. Extender does not have the ability to pull data from another source. Integrations created with Extender can only be used by customers who have purchased a license for Extender.

Capabilities of Extender include:

- Create additional data entry windows
- Create additional window types
- Import data into new windows
- Create forms to capture additional data
- Create views to report on new windows and forms
- Import and export of solutions
- Create actions
- Create menus
- Extended calculated fields functionality

Skills needed for Extender include:

- Knowledge of the various documents in Microsoft Dynamics GP.
- Development experience is only required if Extender is being used to create complex integrations.
- SQL scripting knowledge is needed for conditional calculated fields.

Benefits

Some of the benefits of using Extender are as follows:

- **Simple to learn** – this product is straightforward and takes minimal time to learn.
- **No window layout design** – the user only needs to know what type of information

to display. When adding the fields, the window layout is designed for the user.

- **No code to write** – Extender creates, stores, and retrieves the data automatically.

Differences Between Standard and Enterprise

Extender (formerly Microsoft Dynamics GP Extender) provides all the core functionality of adding fields, windows, detail windows, forms, detail forms and menus to Dynamics GP. If your goal is to simply capture additional data and report on it – then Extender is the answer.

Extender Enterprise is the tool for companies who need to not only capture additional data – but to be clever with how it's captured and what is done with the data. The main functionality that remains exclusively within Extender Enterprise is the Extender logic layer. The layer logic involves the ability to embed code in, behind, and around the screens you build with regular Extender functionality.

The two are almost identical in their base functionality. The biggest difference is logic, which is all about making the screens you build "do something." Examples:

- Grey out parts of a screen
- Auto-calculate and set values as you move around
- Default fields
- Restrict drop downs and look-ups
- Open another GP screen when you hit a button and default values
- Link from a form to a detail form, and from there to a linked form

This logic can be added to Extender Windows and Extender Forms, as well as Microsoft Dynamics GP Forms. Using the Microsoft Dynamics GP logic is an alternative to using VBA. Examples:

Feature	Extra functionality available with Extender Enterprise
Navigation Lists	Ability to create Navigation Lists to query the Extender specific data
Open Extender Form	Open Extender forms from another Extender form and set default values
Open Dynamics GP Form	Open Microsoft Dynamics GP forms from an Extender form and set default values
Open Application	Open an application from an Extender window or form.
SQL Scripting	Use SQL Scripting to run scripts as you navigate around Windows and Forms.

Dynamics GP Scripting	Write Dexterity code to add logic to any Extender Window or Form as well as any Microsoft Dynamics GP form.
Dynamics GP Transactions	Create Dynamics GP Transactions based on the data in Extender Forms

Installation/Upgrade

The steps for installing Extender can be different depending on if you are installing in a Microsoft Dynamics GP Environment where it has never been installed or you are installing into an environment that currently has a previous 2016 or 2018 build of Extender installed.

Please be sure to follow the appropriate steps.

If you are on a previous release of Extender and Microsoft Dynamics GP such as 2015, you are going to need to do an intermediary update to Microsoft Dynamics GP 2016 or 2018. Please review the upgrade steps in that releases manual for more information on the process for the appropriate build. The Extender Upgrade path follows the Microsoft Dynamics GP Upgrade paths.

System Requirements

The system requirements for Extender are the same as those for Microsoft Dynamics GP. You can review the Microsoft Dynamics GP System Requirements documentation on CustomerSource or PartnerSource.

Extender will work with the Microsoft Dynamics GP Web Client. The Extender Menus and Forms do not show in the web client, however, due to the way the GP Web Client Organizes the menus. In Extender, you can add a menu to the Transaction, Cards, Inquiry, etc top level menus. On the GP Desktop client, the Extender menus and therefor the Extender form will be visible. If a user turns off the menus in the GP Desktop client and just uses the Navigation Pages, the Extender menus/forms will not appear. This is the same in the GP Web Client as it does not use the menus and only has the area pages. The workaround to this in the GP Web Client is to use the Home Page Quick Links. One of the options in the Quick Links is "Extender" and this will allow you to access the menu/form that was created in Extender. Once an Extender form is added to the Quick Links, it will be available in the desktop client and the web client.

Prerequisites

Installing Extender on Microsoft Dynamics GP requires that the Microsoft Dynamics GP version 18.8.xxxx. This is available in the Microsoft Dynamics GP October 2025 Release.

Release Notes

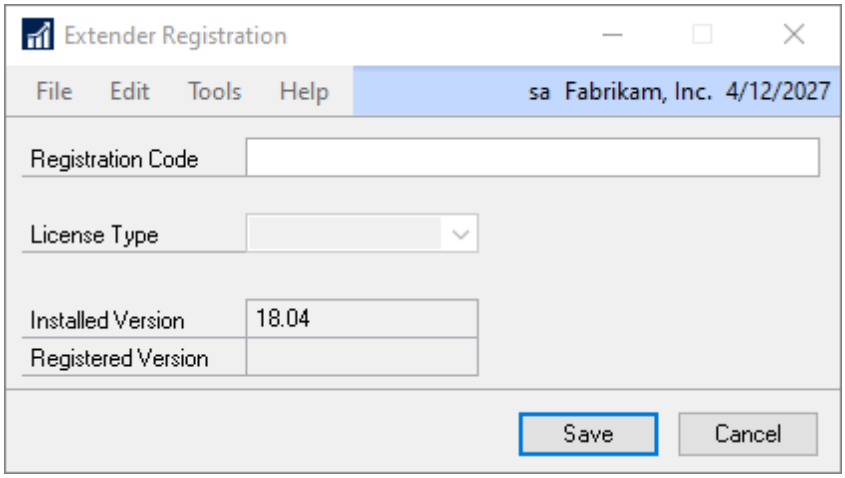
The Extender upgrade follows the supported upgrade paths from 2018 and 2016 that are available for Microsoft Dynamics GP. You can find these on PartnerSource or

CustomerSource in the Upgrading to Microsoft Dynamics GP Hot Topic.

Registration

To register Extender:

1. Open the Extender Registration window (Microsoft Dynamics GP – Tools – Extender – Register Extender).



2. Enter your supplied Registration Code.
3. Click on the Save button.

New Environment

These steps are only for installations where Extender has never been installed into the Microsoft Dynamics GP Environment. These steps can also be used if you are installing Extender on a new workstation.

Upgrading from Microsoft Dynamics GP 2018 or 2016:

If you are upgrading from Microsoft Dynamics GP 2018 or 2016 and previously used Extender, please see the Upgrading from 2018 / 2016 section.

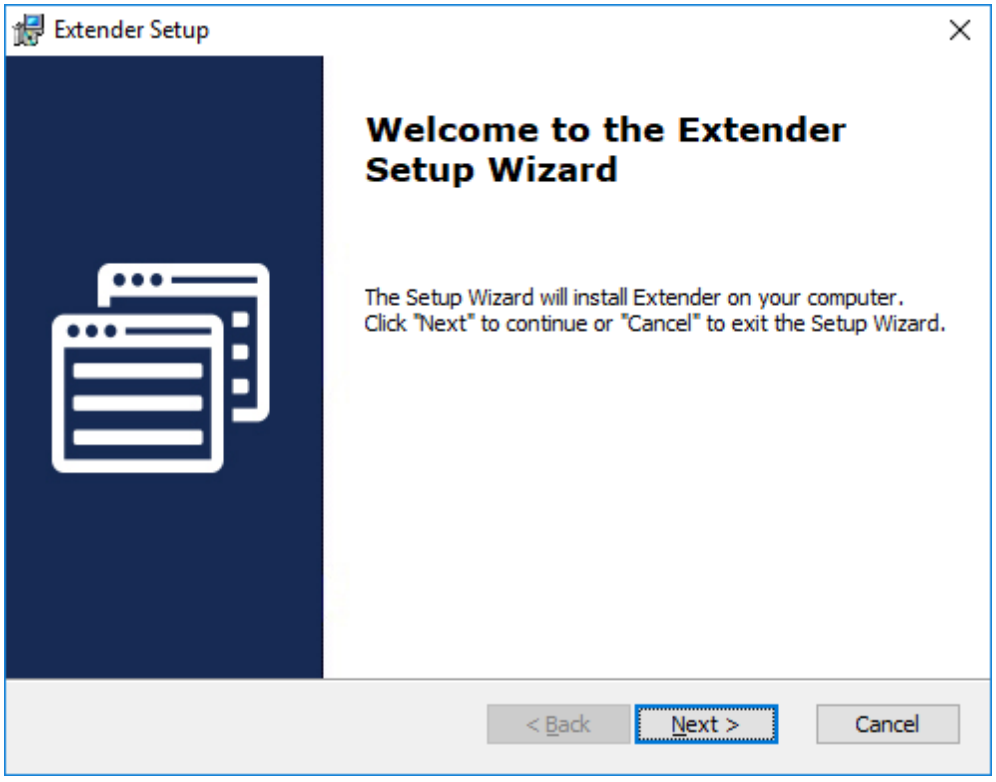
Upgrading to the latest build for Microsoft Dynamics GP:

If you are currently using Extender with Microsoft Dynamics GP and are just trying to upgrade to the latest build, please see the Upgrading Extender Install section.

Installation Steps

To install Extender:

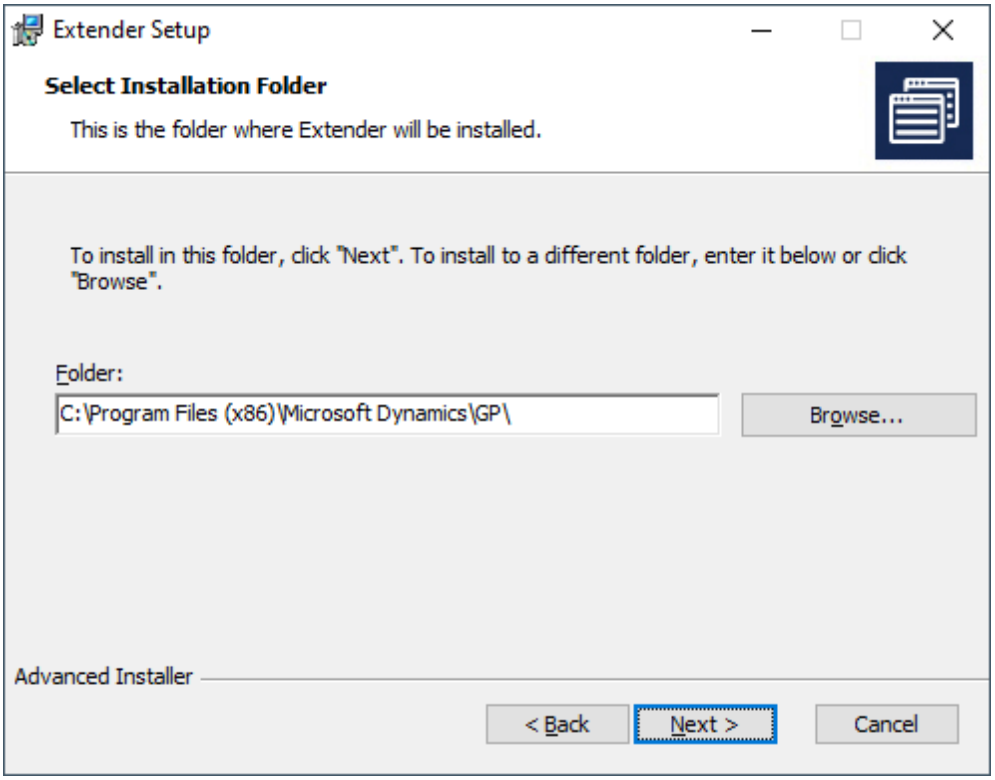
1. Run the setup executable, Extender.msi, which will start the Extender installation.
2. Click on the Next button to continue.



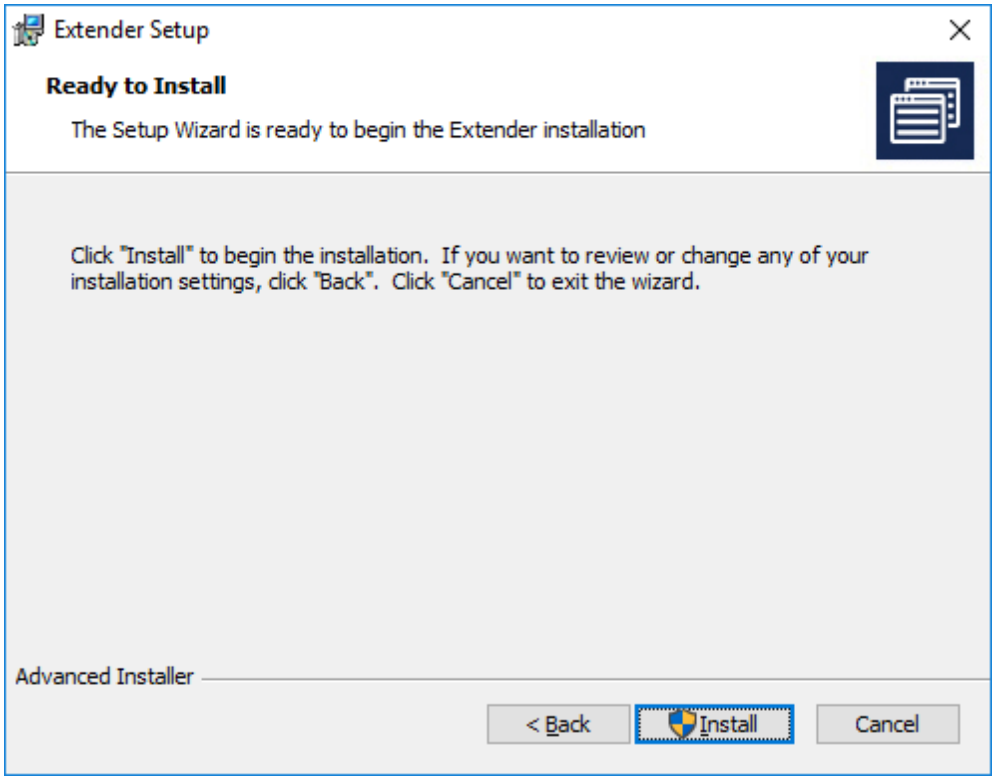
3. Read the End-user License Agreement and mark the "I accept the terms in the License Agreement." Click Next.



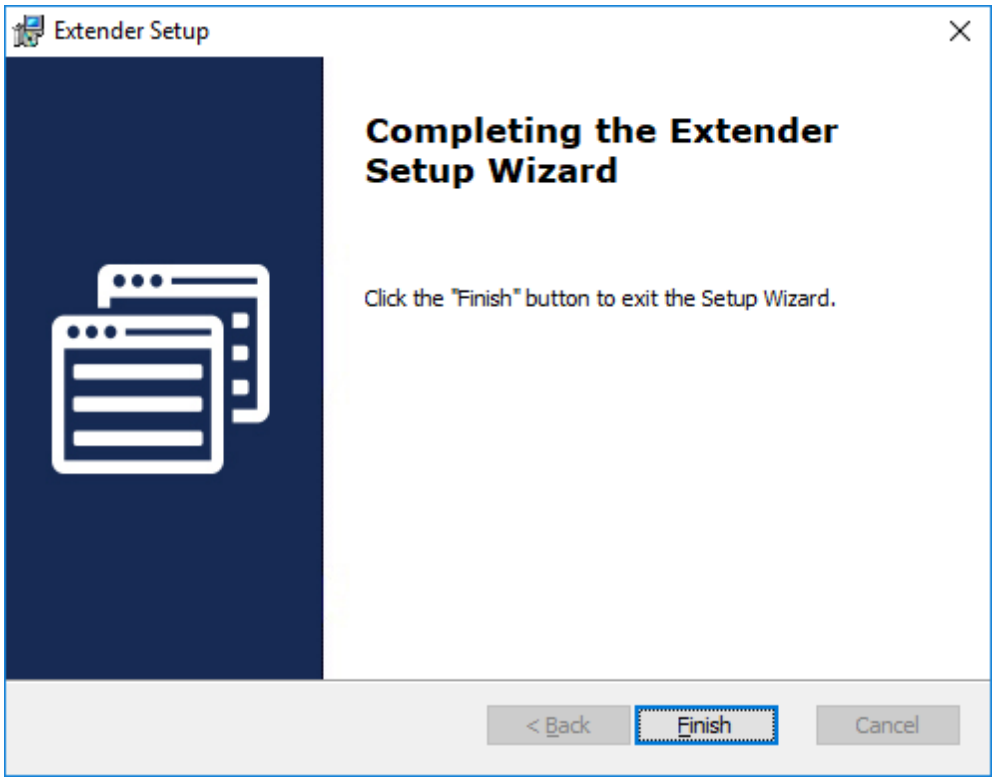
4. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



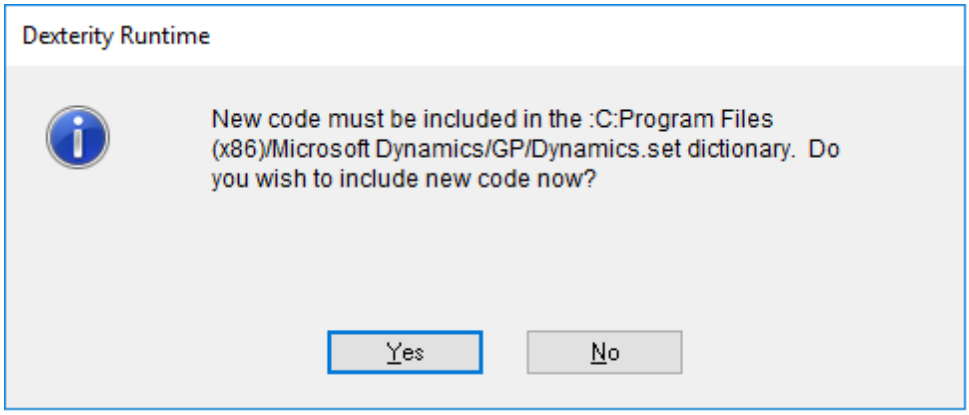
5. Click on the Next button to continue.
6. Click on the Install button to begin the installation.



7. The Extender Installation will run. It may take a few minutes for this to complete.
8. Click on the Finish button to complete the installation.



9. Launch Microsoft Dynamics GP.
10. Click the Yes button to include the Extender code in your Microsoft Dynamics GP application. If you click No, you will not be able to access the Extender application.



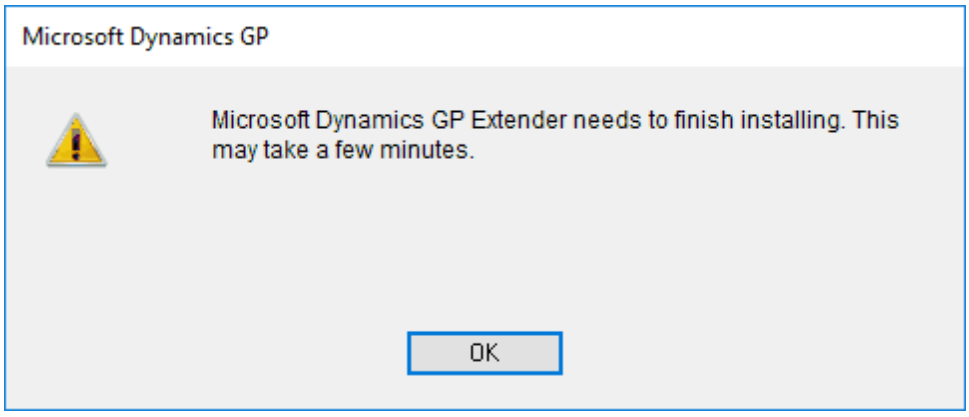
If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

11. Repeat the installation process on each workstation/server that is running Microsoft Dynamics GP.

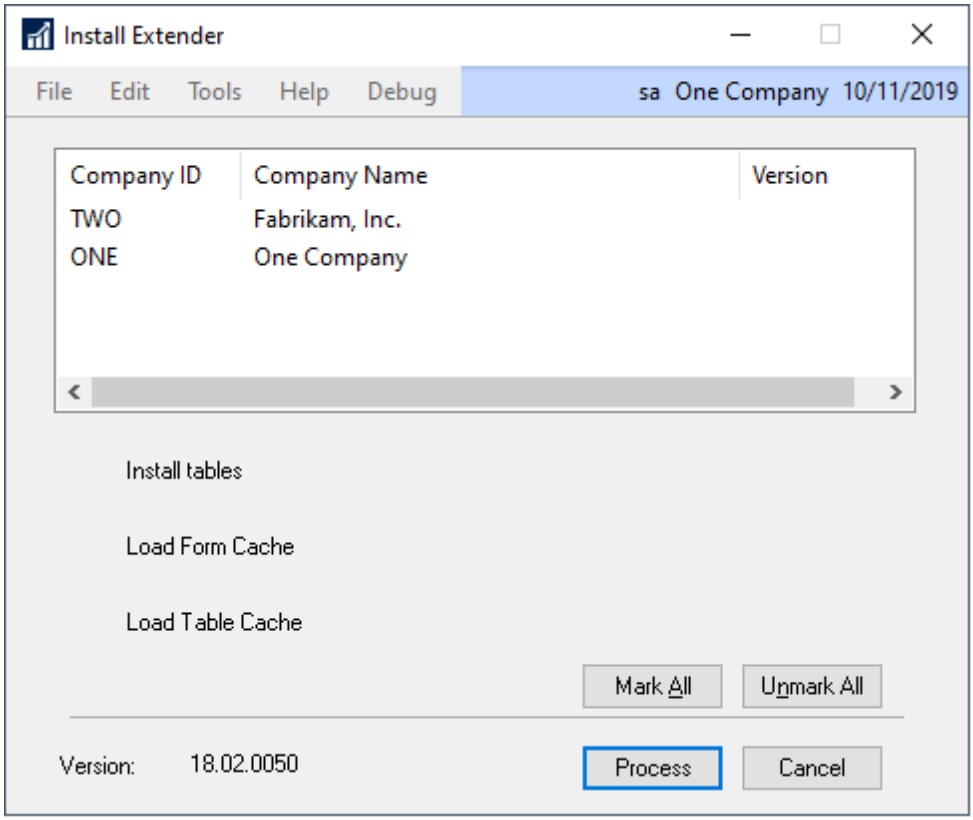
After logging in to Microsoft Dynamics GP on the first workstation/server, you will need to run the setup routine to create the SQL tables and other objects.

To setup Extender

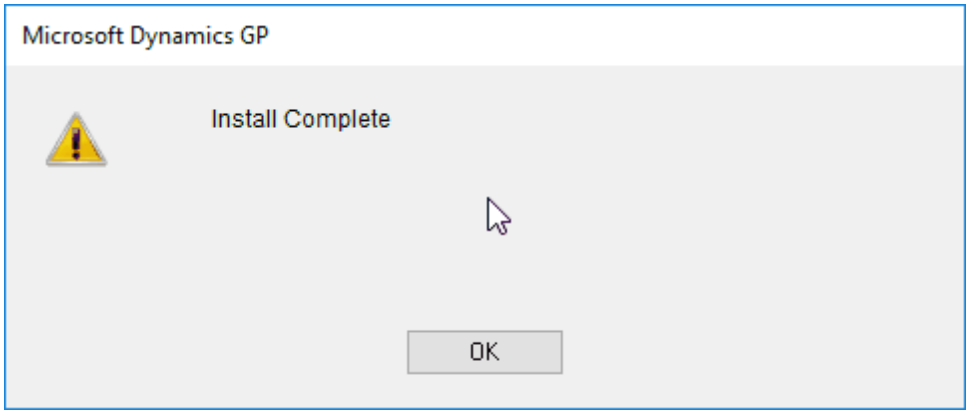
1. Log into Microsoft Dynamics GP as the 'sa' user or another user that is setup as sysadmin or dbowner in SQL.
2. Select a company that you want to install Extender into.
3. When Microsoft Dynamics GP is loading into the company, you will be prompted that Extender needs to install. Click OK to the message



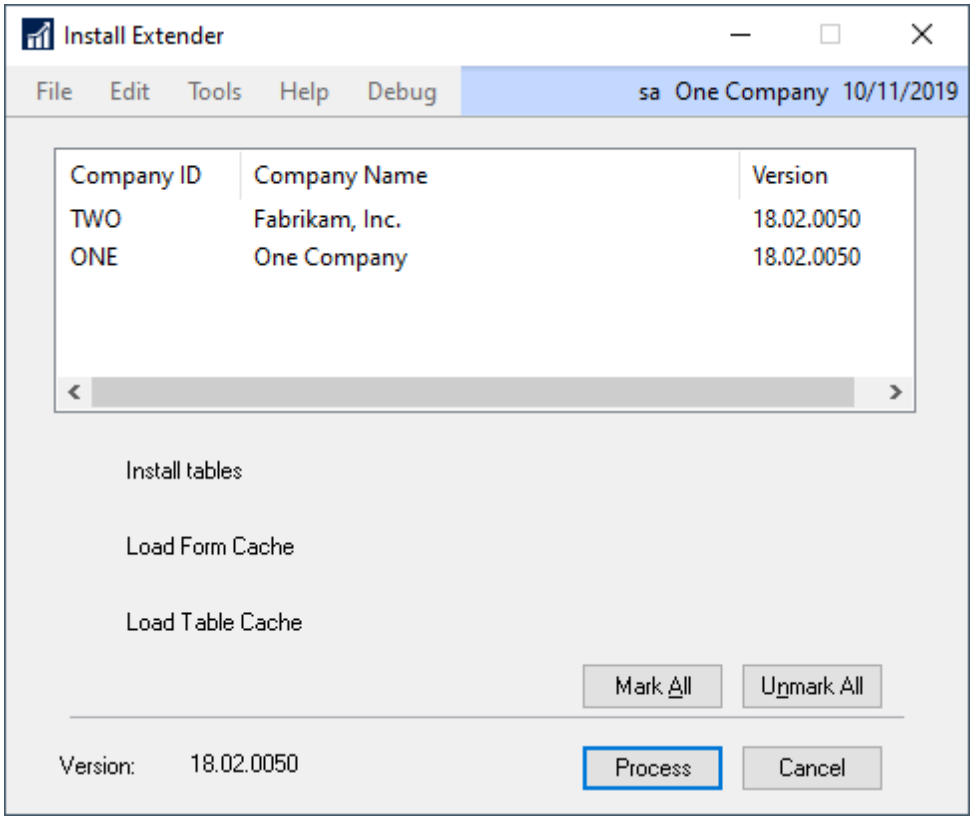
4. The Install Extender Window will open for you and list the companies to install to.



5. Highlight the Company ID that you want to install Extender to and click Process.
6. It will process for several minutes and then display a message that the install is complete. Click OK on the message.



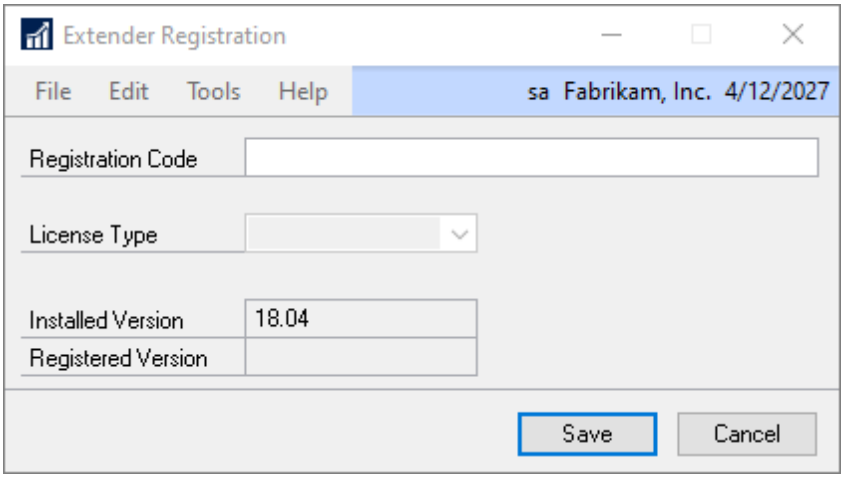
7. It will return you to the Install Extender window and display the version for the company you installed to.



8. You can continue repeating steps 5 and 6 for each company that you want to install Extender to. If you don't install Extender in a specific company, it will not be available to use in that company. When you log into that particular company, it will continue asking you to install Extender until it is done.
9. When complete, click Cancel to close the Install Extender window.

To register Extender:

1. Open the Extender Registration window (Microsoft Dynamics GP – Tools – Extender – Register Extender).



2. Enter your supplied Registration Code.
3. Click on the Save button.

Upgrading from 2018 / 2016

This section covers the Upgrade process to upgrade your Extender data and resources from Microsoft Dynamics GP 2018 / 2016.

New Installation of Extender on Microsoft Dynamics GP:
If you are installing into an environment on Microsoft Dynamics GP where Extender was never previously installed, please see the New Environment section.

Upgrading to the latest build for Microsoft Dynamics GP:
If you are currently using Extender with Microsoft Dynamics GP and are just trying to upgrade to the latest build, please see the Upgrading Extender Install section.

If you are already using Extender on Microsoft Dynamics GP, do not run through the upgrade process. This process is only for those coming from Microsoft Dynamics GP 2018/2016.

The Extender upgrade follows the supported upgrade paths from 2018 and 2016 that are available for Microsoft Dynamics GP. You can find these on PartnerSource or CustomerSource in the Upgrading to Microsoft Dynamics GP Hot Topic.

As in any upgrade process, we recommend that you use a test environment to walk through the upgrade process. By doing this, you can identify and resolve any potential issues that may occur in the upgrade process. A test upgrade also allows you to lean the new features in

Extender before putting it into production.

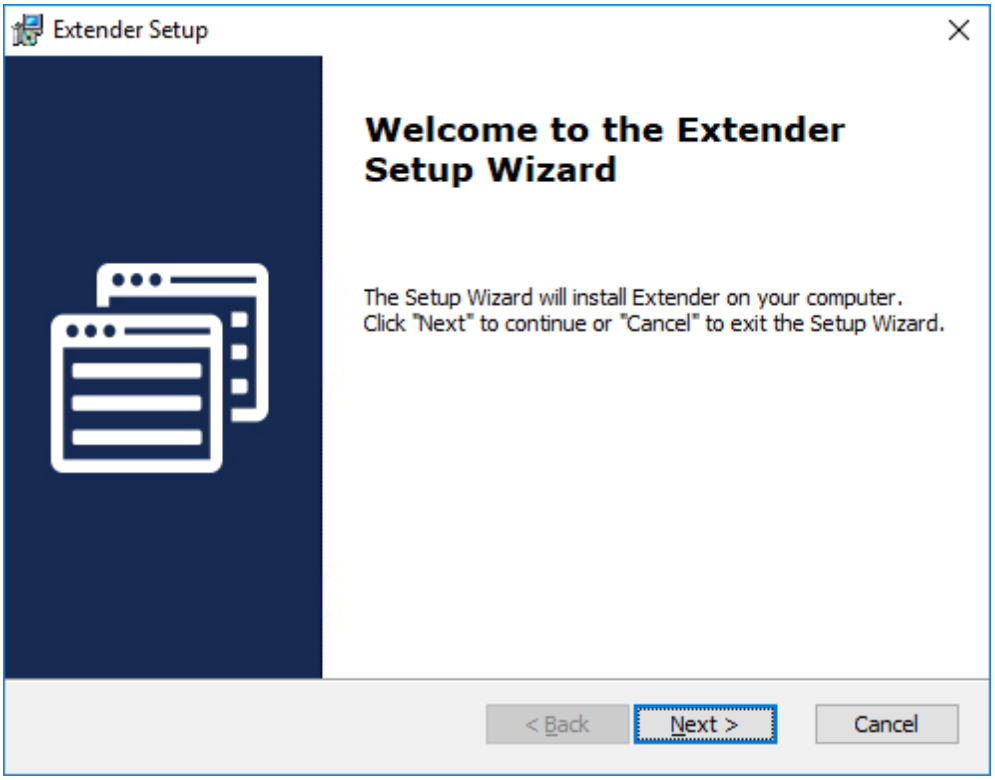
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Installation/Upgrade Steps

If you are already using Extender on Microsoft Dynamics GP, do not run through the upgrade process. This process is only for those coming from Microsoft Dynamics GP 2018 / 2016.

To install Extender:

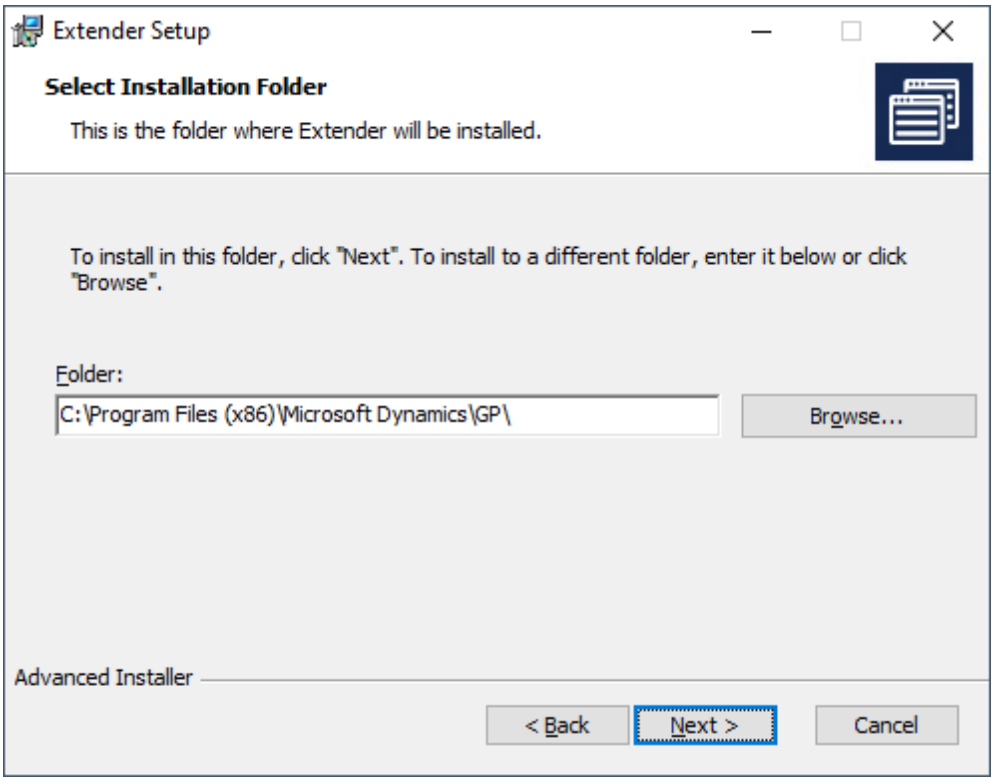
1. Make complete backups of your system and company databases for Microsoft Dynamics GP.
2. Run the setup executable, Extender (18.08.0xxx).msi, which will start the Extender installation.
3. Click on the Next button to continue.



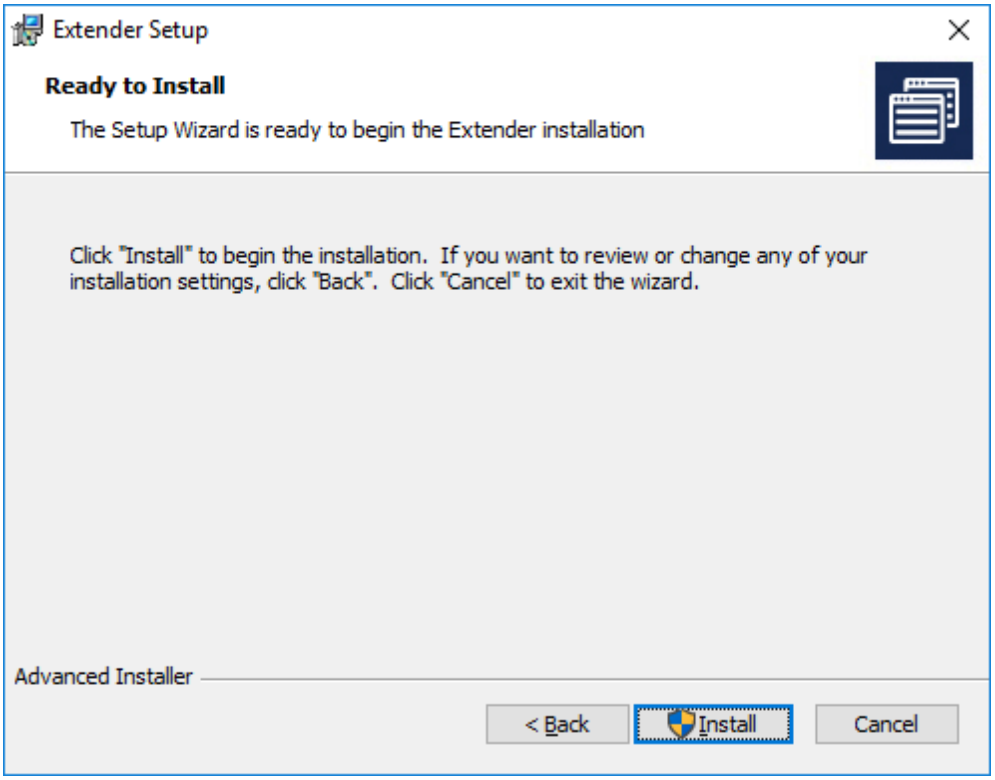
4. Read the End-user License Agreement and mark the "I accept the terms in the License Agreement." Click Next.



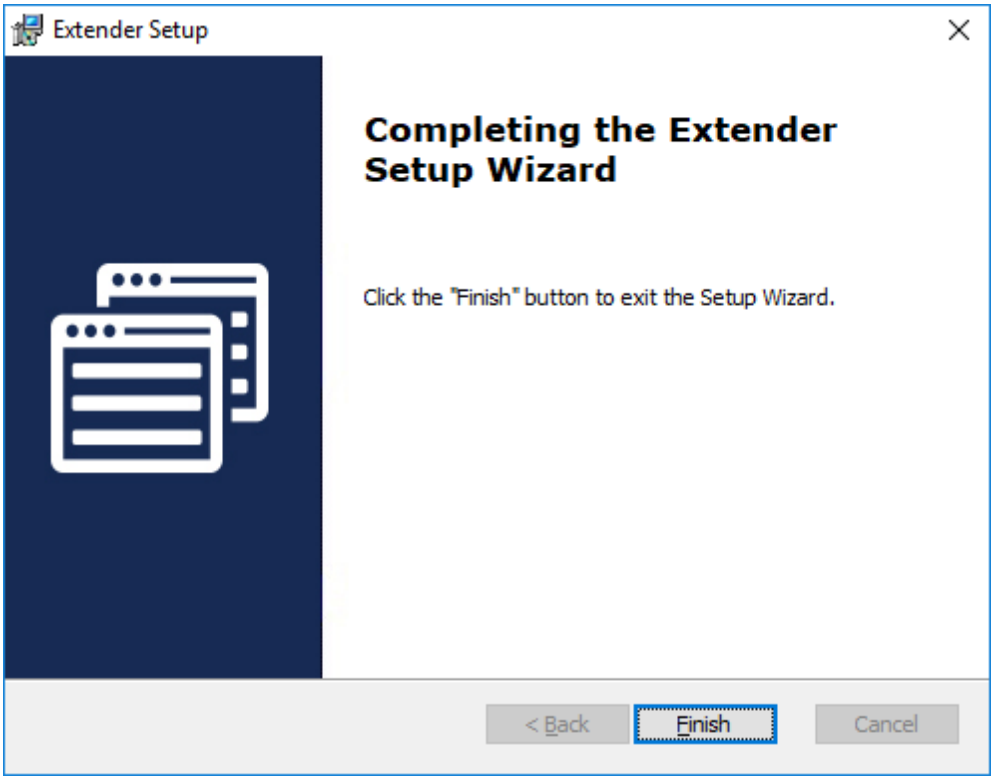
5. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



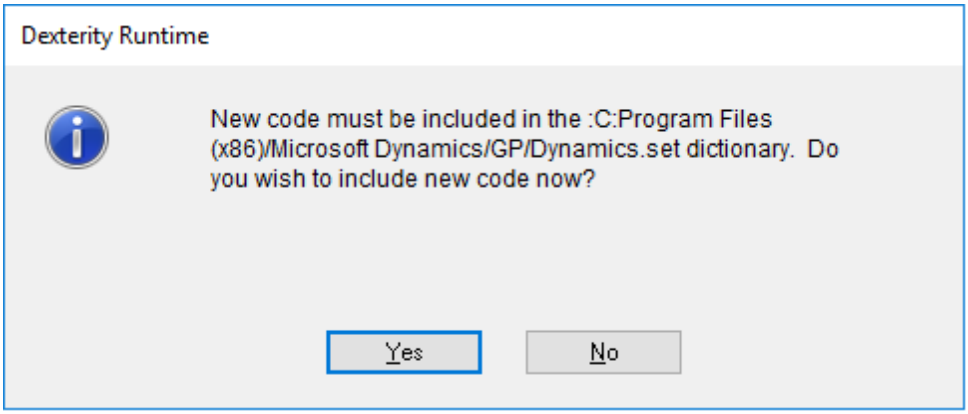
6. Click on the Next button to continue.
7. Click on the Install button to begin the installation.



8. The Extender Installation will run. It may take a few minutes for this to complete.
9. Click on the Finish button to complete the installation.



10. Launch Microsoft Dynamics GP.
11. Click the Yes button to include the Extender code in your Microsoft Dynamics GP application. If you click No, you will not be able to access the Extender application.



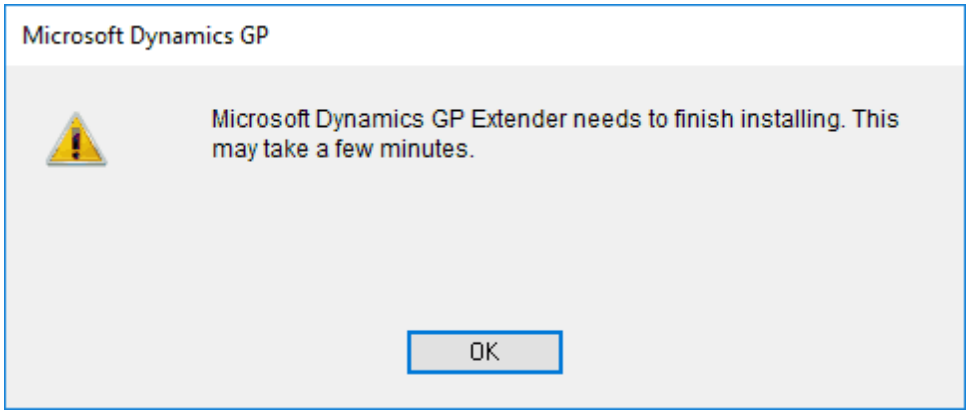
If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

12. Repeat the installation process on each workstation/server that is running Microsoft Dynamics GP.

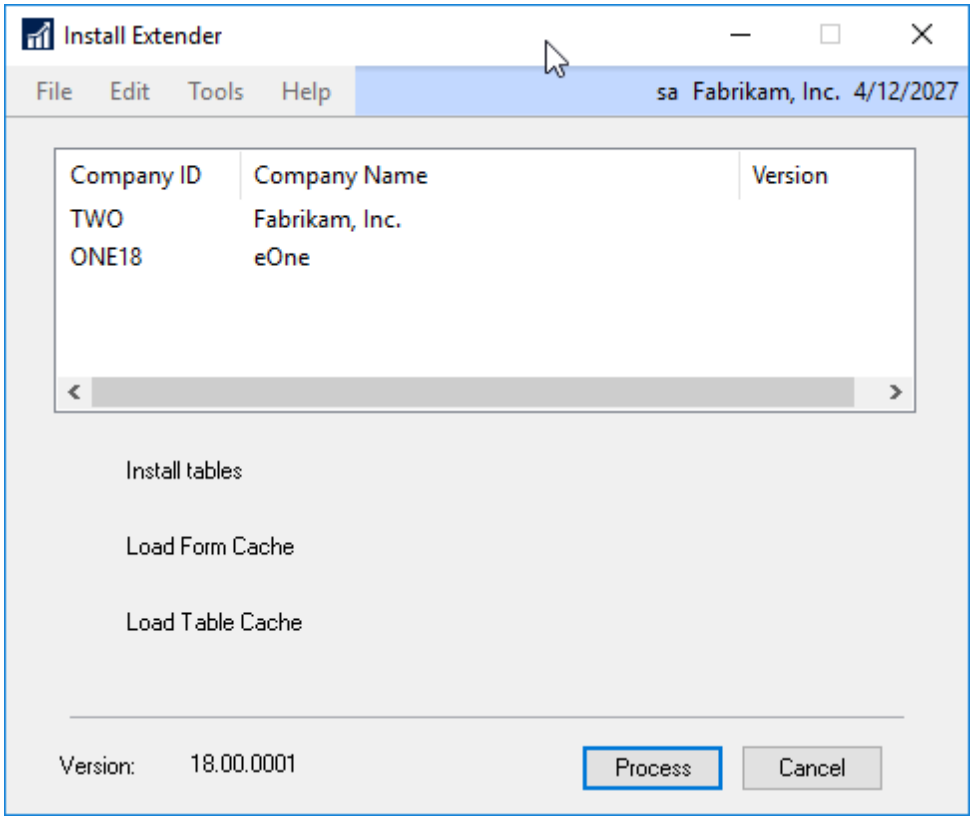
After logging in to Microsoft Dynamics GP on the first workstation/server, you will need to run the setup routine to create any new SQL tables and other objects.

To setup Extender

1. Log into Microsoft Dynamics GP as the 'sa' user or another user that is setup as sysadmin or dbowner in SQL.
2. Select a company that you want to upgrade Extender in.
3. When Microsoft Dynamics GP is loading into the company, you will be prompted that Extender needs to install. Click OK to the message

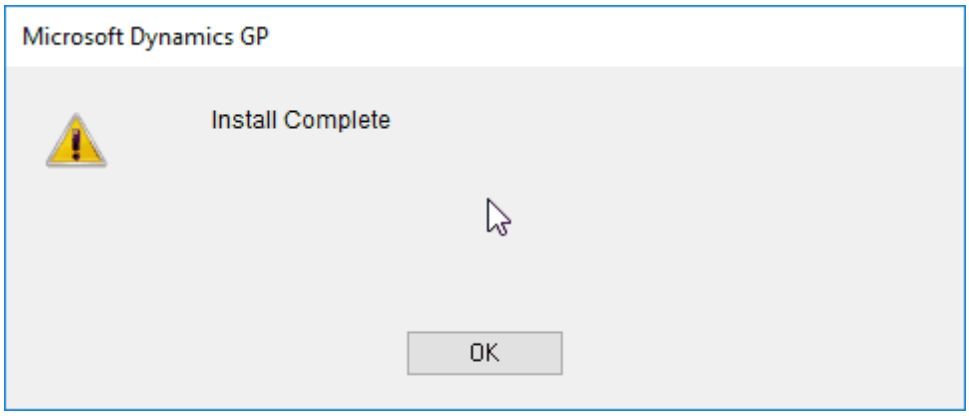


4. The Install Extender Window will open for you and list the companies to upgrade to.

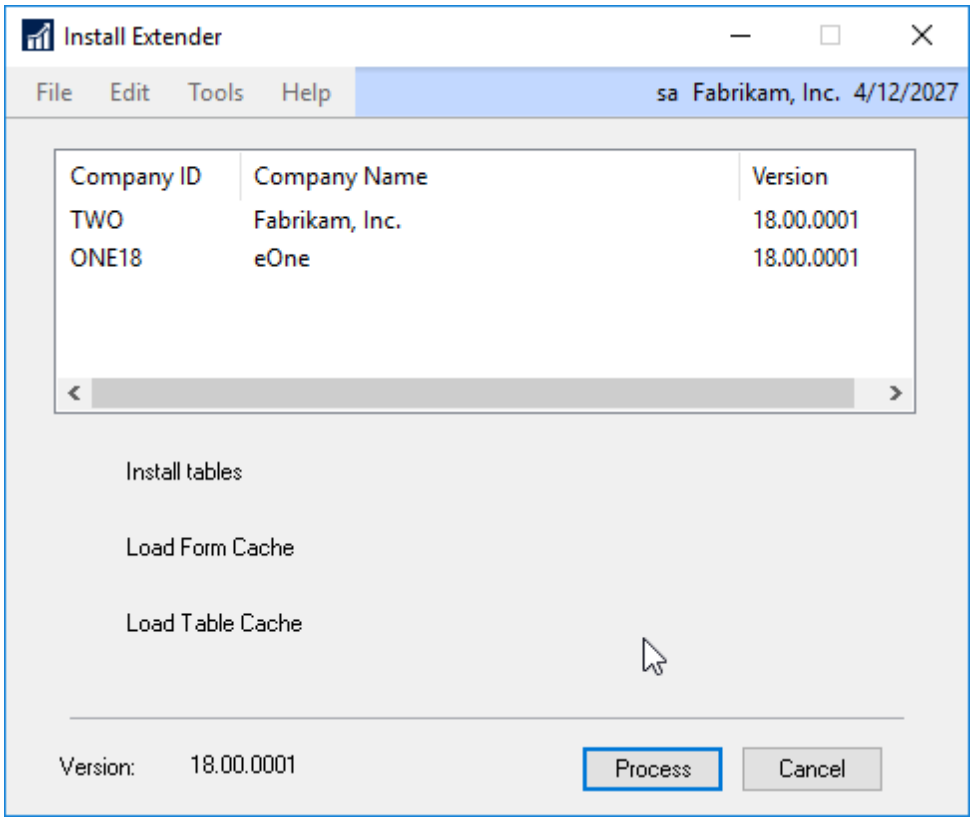


5. Highlight the Company ID that you want to Upgrade Extender in and click Process.

6. It will process for several minutes and then display a message that the install is complete. Click OK on the message.



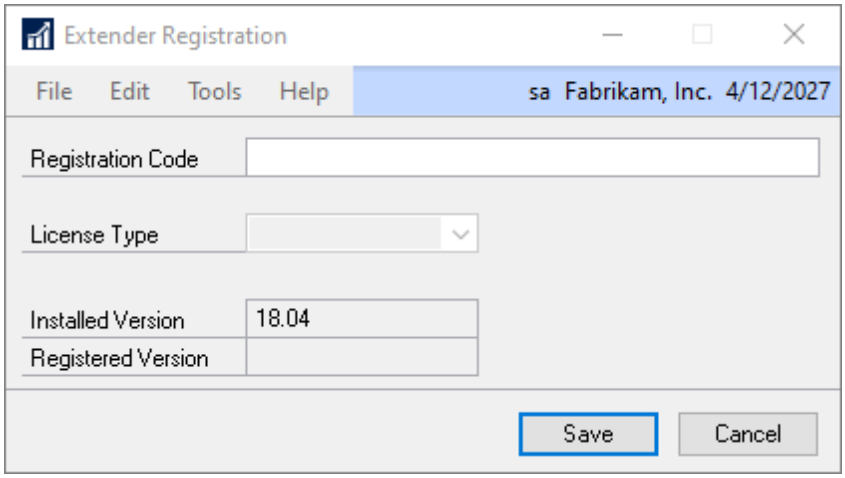
7. It will return you to the Install Extender window and display the version for the company you upgraded.



8. You can continue repeating steps 5 and 6 for each company that you want to upgrade Extender in. If you don't upgrade Extender in a specific company, it will not be available to use in that company. When you log into that particular

company, it will continue asking you to upgrade Extender until it is done.

9. When complete, click Cancel to close the Install Extender window.
10. Once all companies have been updated, register Extender by going to Microsoft Dynamics GP – Tools – Extender – Register Extender.



11. Enter your supplied Registration Code.
12. Click on the Save button.
13. Re-launch Microsoft Dynamics GP and Extender should be ready to be used.



It is always recommended that after the upgrade is complete, you make complete database backups of your Microsoft Dynamics GP databases (system and company) before starting to use Extender and Microsoft Dynamics GP.

Upgrading Extender Install

This section covers the Upgrade process to update your Extender data and resources from a previous build on Microsoft Dynamics GP.

New Installation of Extender on Microsoft Dynamics GP:
If you are installing into an environment on Microsoft Dynamics GP where Extender was never previously installed, please see the New Environment section.

Upgrading from Microsoft Dynamics GP 2018 or 2016:
If you are upgrading from Microsoft Dynamics GP 2018 or 2016 and previously used Extender, please see the Upgrading from 2018 / 2016 section.

If you were previously using using Extender on Microsoft Dynamics GP 2018 or 2016, do not run through the update process. This process is only for those coming from a previously build on Microsoft Dynamics GP.

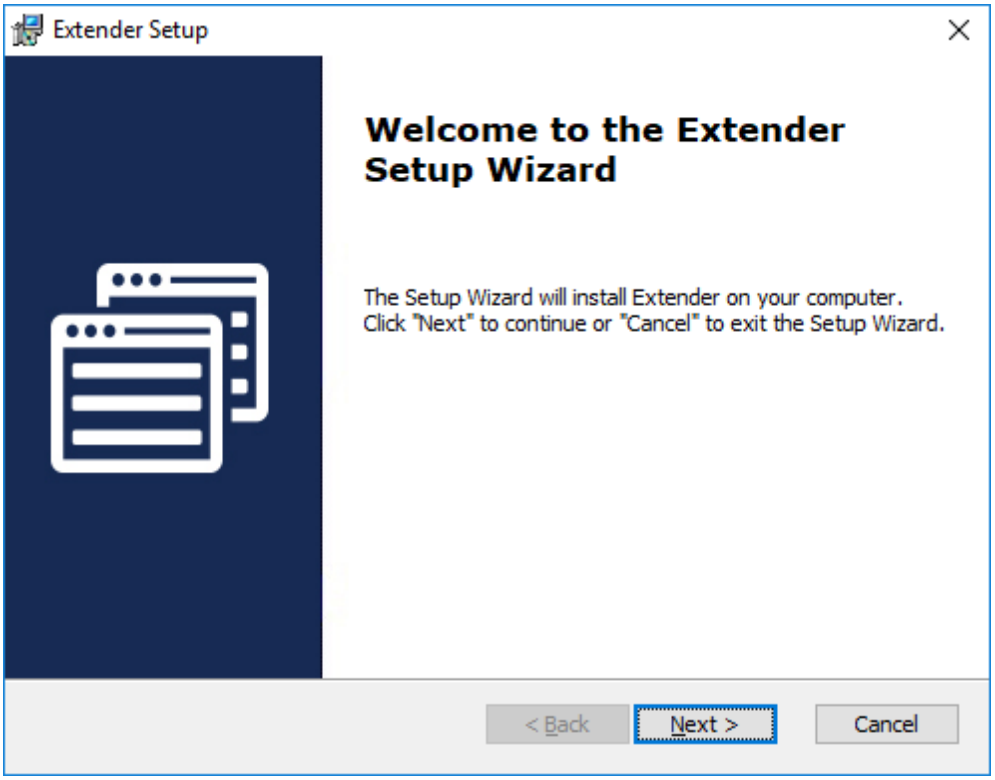
As in any upgrade process, we recommend that you use a test environment to walk through the upgrade process. By doing this, you can identify and resolve any potential issues that may occur in the upgrade process. A test upgrade also allows you to lean the new features in Extender before putting it into production.

Installation/Upgrade Steps

If you are using Extender on Microsoft Dynamics GP 2018 or 2016, do not run through the update process. This process is only for those already using Microsoft Dynamics GP.

To install Extender:

1. Make complete backups of your system and company databases for Microsoft Dynamics GP.
2. Run the setup executable, Extender (18.08.0xxx).msi, which will start the Extender installation.
3. Click on the Next button to continue.

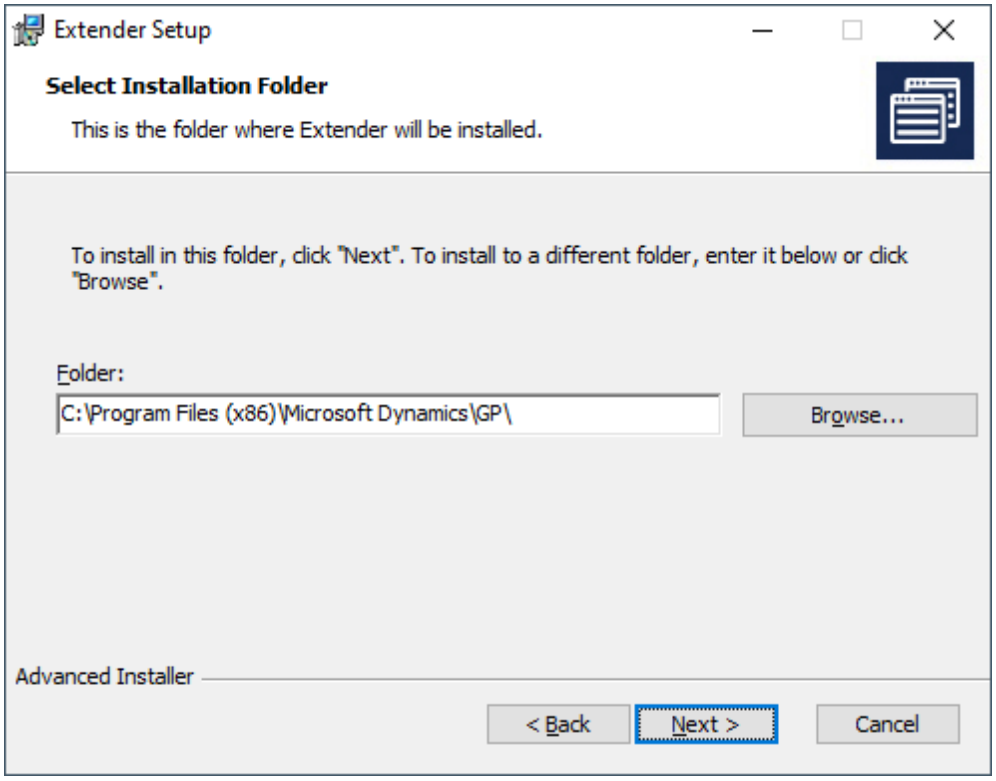


4. Read the End-user License Agreement and mark the "I accept the terms in the

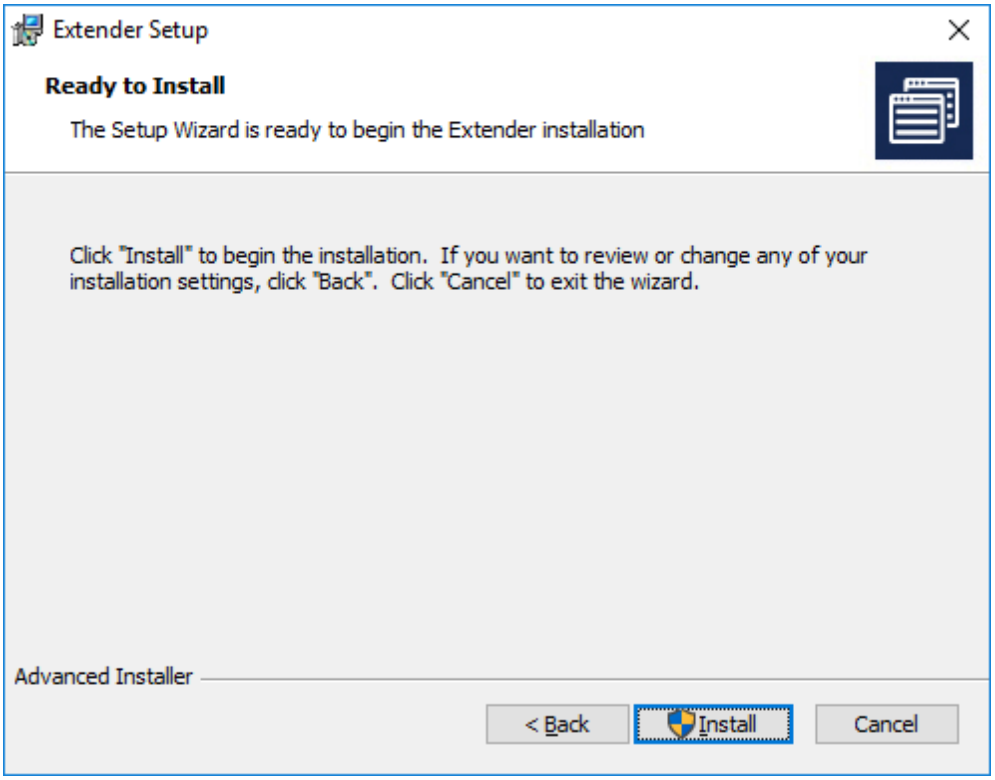
License Agreement." Click Next.



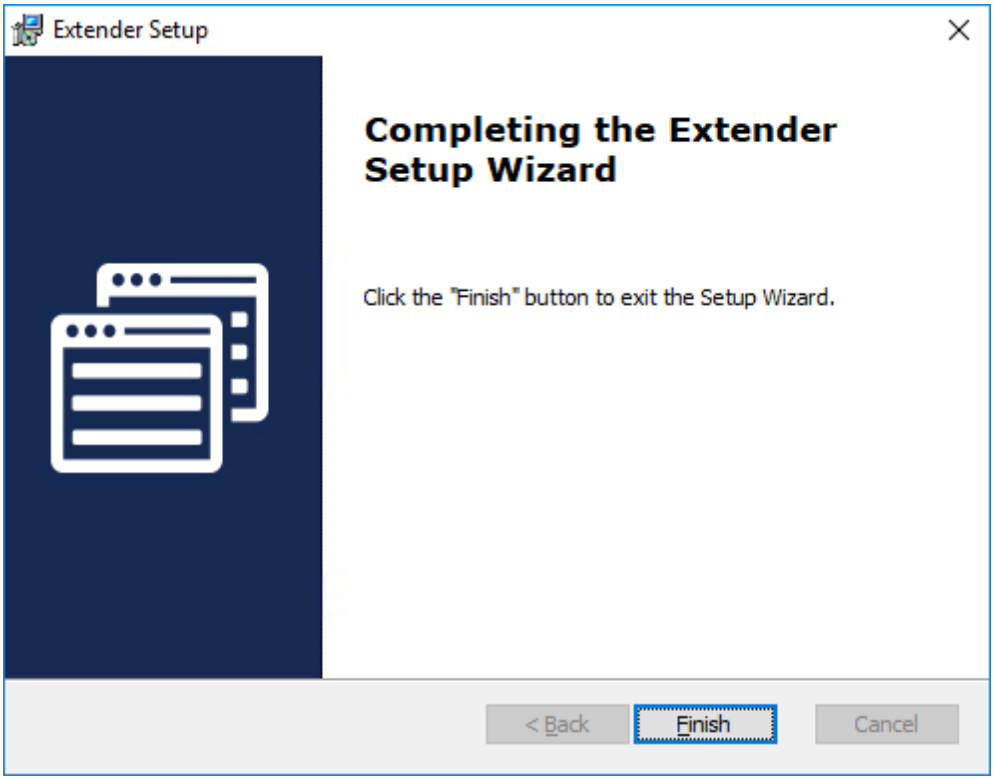
5. Select the location where your Microsoft Dynamics GP program is installed using the Browse button.



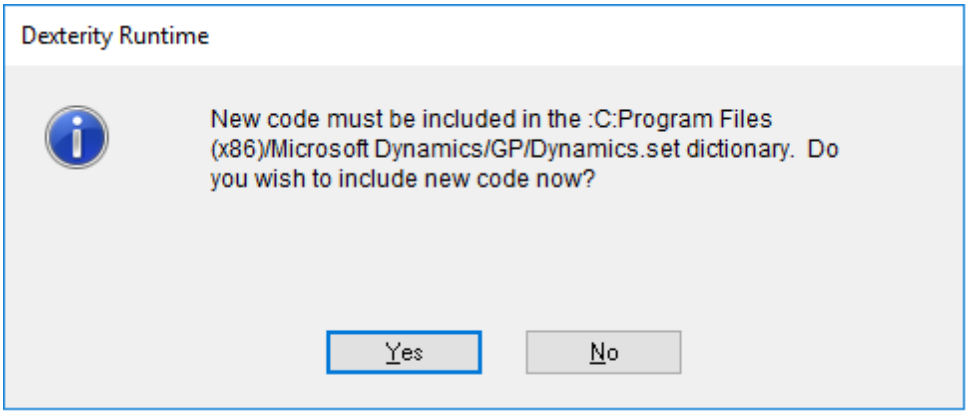
6. Click on the Next button to continue.
7. Click on the Install button to begin the installation.



8. The Extender Installation will run. It may take a few minutes for this to complete.
9. Click on the Finish button to complete the installation.



10. Launch Microsoft Dynamics GP.
11. Click the Yes button to include the Extender code in your Microsoft Dynamics GP application. If you click No, you will not be able to access the Extender application.



If you the User Account Control setting in Windows is turned on, you may need to launch Microsoft Dynamics GP using the 'Run as Administrator' option in Windows to be able to successfully include the new code.

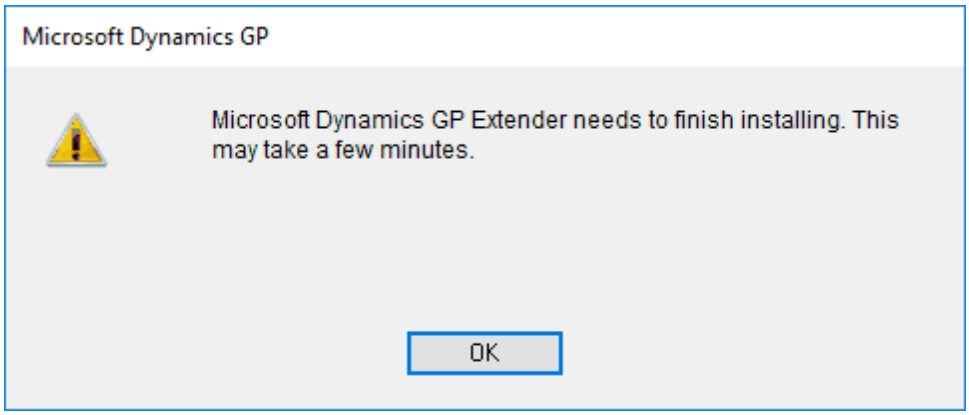
12. Repeat the installation process on each workstation/server that is running Microsoft Dynamics GP.

After logging in to Microsoft Dynamics GP on the first workstation/server, you will need to run the setup routine to create any new SQL tables and other objects.

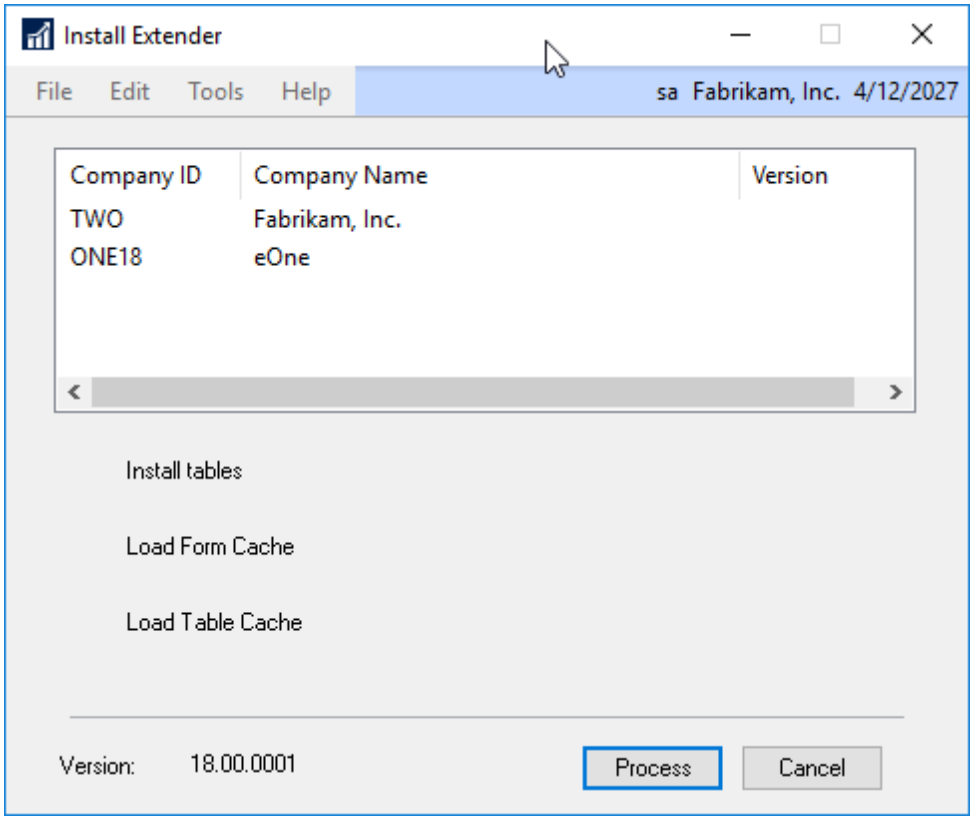
To setup Extender

If there are no table changes between the release you previously had installed and this new release you are installing, the Install Extender window will not open and it will just launch right into Microsoft Dynamics GP after including new code.

1. Log into Microsoft Dynamics GP as the 'sa' user or another user that is setup as sysadmin or dbowner in SQL.
2. Select a company that you want to upgrade Extender in.
3. When Microsoft Dynamics GP is loading into the company, you will be prompted that Extender needs to install. Click OK to the message

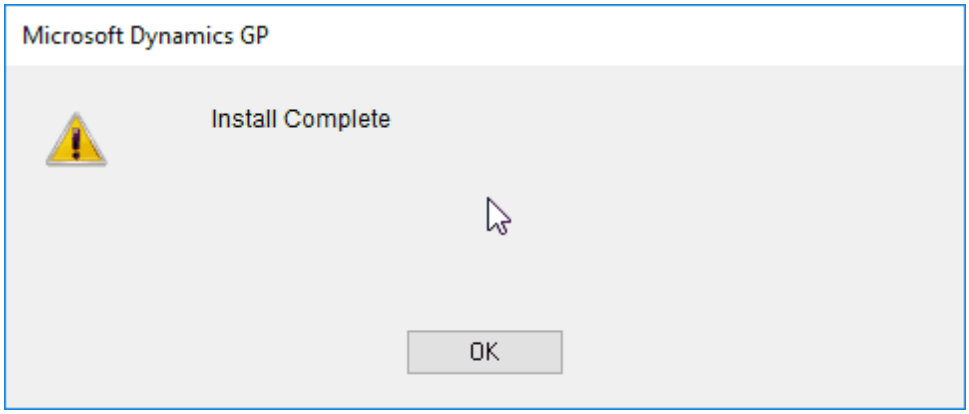


4. The Install Extender Window will open for you and list the companies to upgrade to.

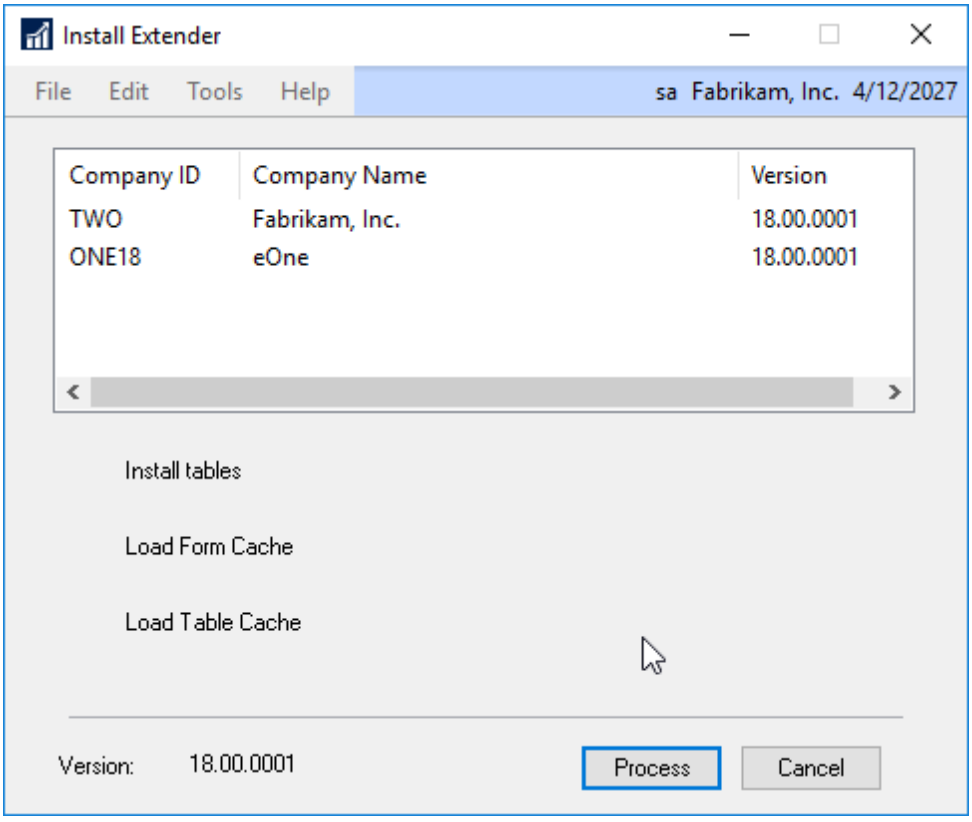


5. Highlight the Company ID that you want to Upgrade Extender in and click Process.

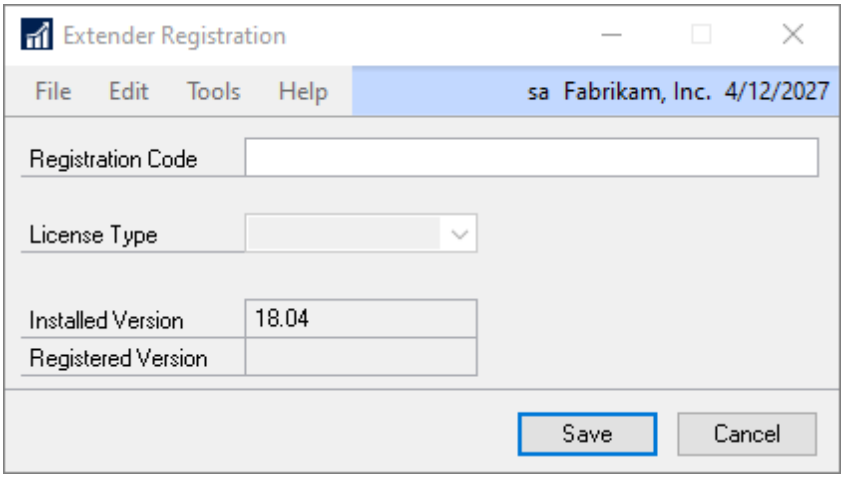
6. It will process for several minutes and then display a message that the install is complete. Click OK on the message.



7. It will return you to the Install Extender window and display the version for the company you upgraded.



8. You can continue repeating steps 5 and 6 for each company that you want to upgrade Extender in. If you don't upgrade Extender in a specific company, it will not be available to use in that company. When you log into that particular company, it will continue asking you to upgrade Extender until it is done.
9. When complete, click Cancel to close the Install Extender window.
10. Once all companies have been updated, register Extender by going to Microsoft Dynamics GP – Tools – Extender – Register Extender.



11. Enter your supplied Registration Code.

12. Click on the Save button.
13. Re-launch Microsoft Dynamics GP and Extender should be ready to be used.



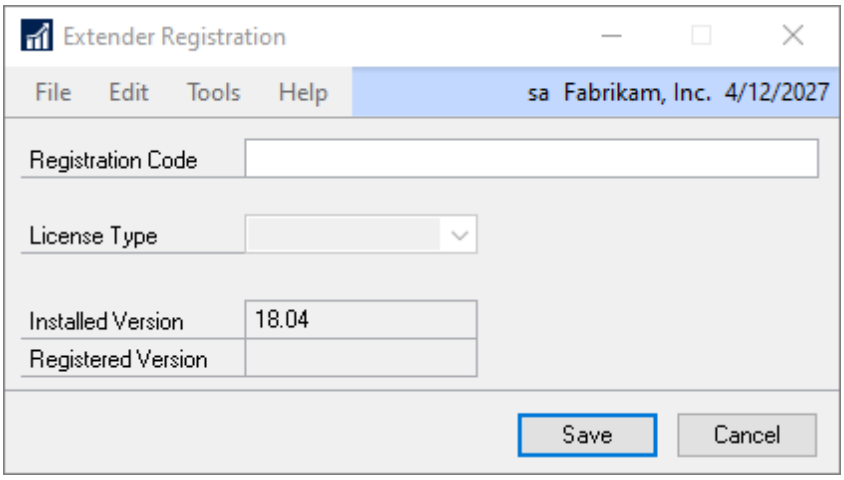
It is always recommended that after the update is complete, you make complete database backups of your Microsoft Dynamics GP databases (system and company) before starting to use Extender and Microsoft Dynamics GP.

Upgrading Standard to Enterprise

There are times where an installation will need to be updated from Extender Standard to Extender Enterprise as there is a need for the additional functionality.

To upgrade Extender Standard to Extender Enterprise:

1. Log into Microsoft Dynamics GP as a user that has access to the Extender Registration window.
2. Open the Extender Registration window by going to Microsoft Dynamics GP - Tools - Extender - Register Extender.



3. Be sure the Registration Code is populated.
4. Click on the Save button.
5. Log out of Microsoft Dynamics GP and when logging back in, the Extender Enterprise features will be activated.

Extender Concepts

This section covers the Terminology used with Extender as well as how to navigate around Extender. It also walks through the field types available in Extender.

Terminology

This module describes the terminology that will be used throughout Extender and throughout this training manual.

Terminology

Products

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

Series

A series is a group used to organize resources. Examples of Series are Financial, Sales, Purchasing, Payroll, etc.

Forms

- In Microsoft Dynamics GP, a form is a collection of related windows. All Microsoft Dynamics GP Forms have at least one Window in them. Each form has one main window that is called by default and can have other windows that are opened from links or buttons on the default window.
- In Extender, a Form is a default window that can have additional windows attached to it but doesn't have to. Extender Forms are accessed by adding them to menus, shortcuts, etc within Microsoft Dynamics GP as they are not attached to any Microsoft Dynamics GP window. An Extender Form can include a lookup to tie it to existing Microsoft Dynamics GP data, but it is not required.

Windows

- In Microsoft Dynamics GP, a window is a single data entry screen used to collect, edit or display information. All Microsoft Dynamics GP windows are contained within a Form.
- In Extender, a Window is an individual window that is attached to an existing Microsoft Dynamics GP window. An Extender Window can only be accessed from within the Microsoft Dynamics GP window it is attached to. An Extender Window is required to be linked to a Microsoft Dynamics GP data record.

Key Fields

Key fields are used to assign a unique identifier from a Microsoft Dynamics GP window to an Extender record. This is generally the required fields for the window.

Hot Keys

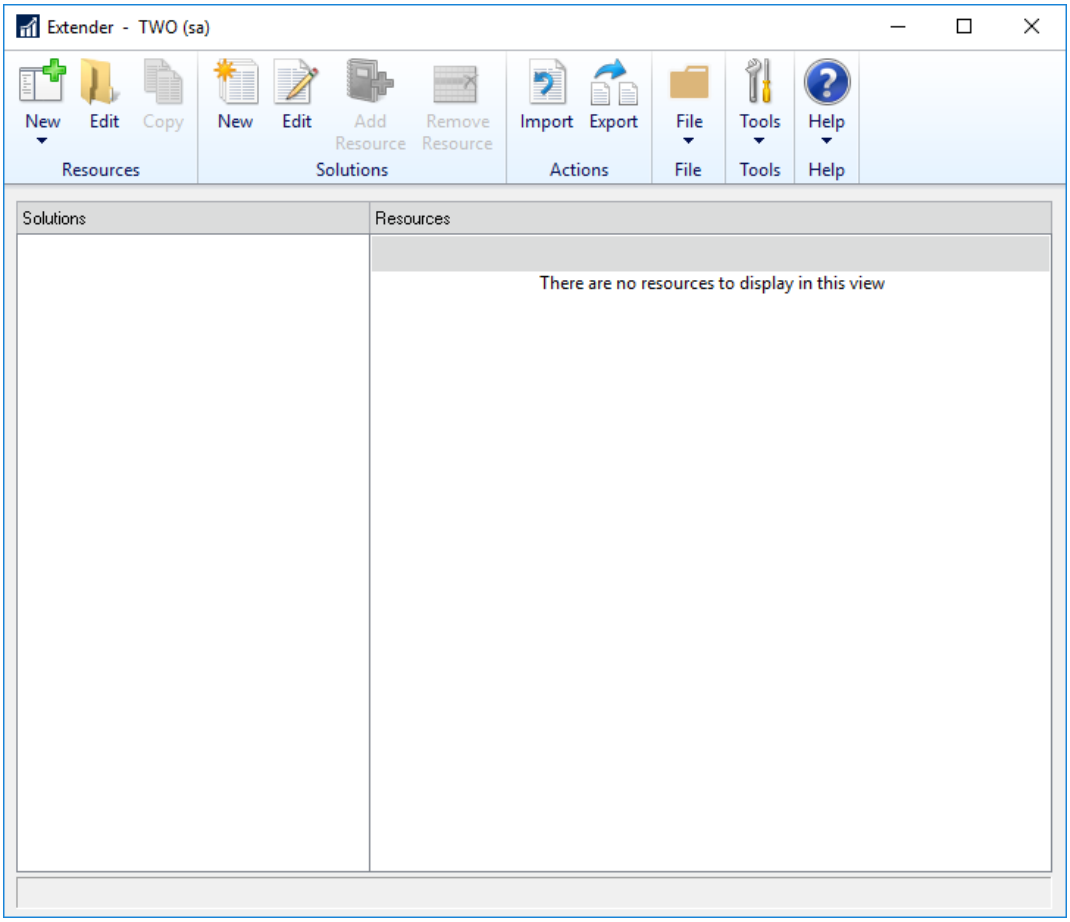
A Hot Key is a keyboard shortcut used to quickly access functionality.

Extender Interface

This module 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.

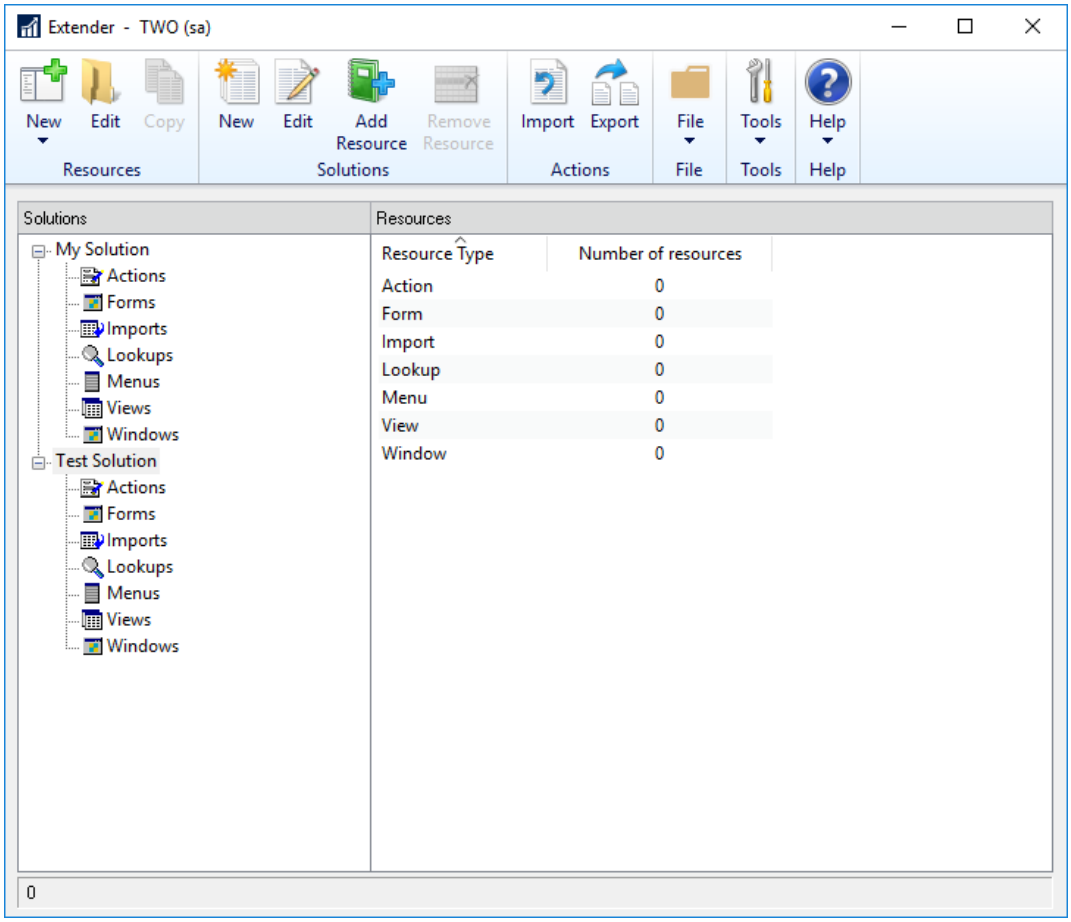
Opening Extender

Once Extender is installed, it can be accessed by going to Microsoft Dynamics GP >> Tools >> Extender >> Extender.



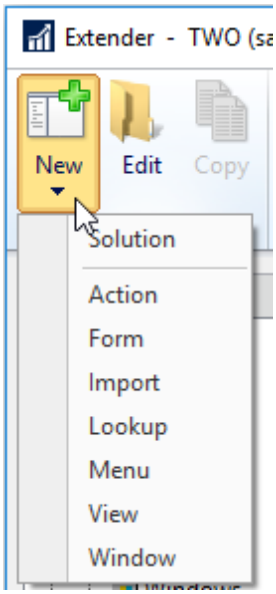
Solutions

Extender Resources are organized into Solutions. Solutions are a way to group resources that interact together.

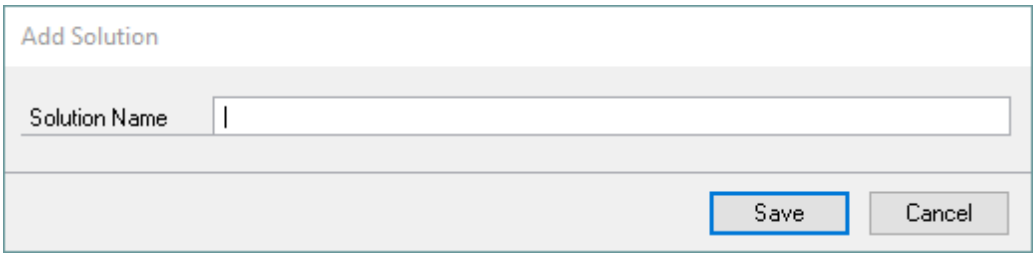


To create a new Solution:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Click the drop down arrow next to the New button and select Solution.



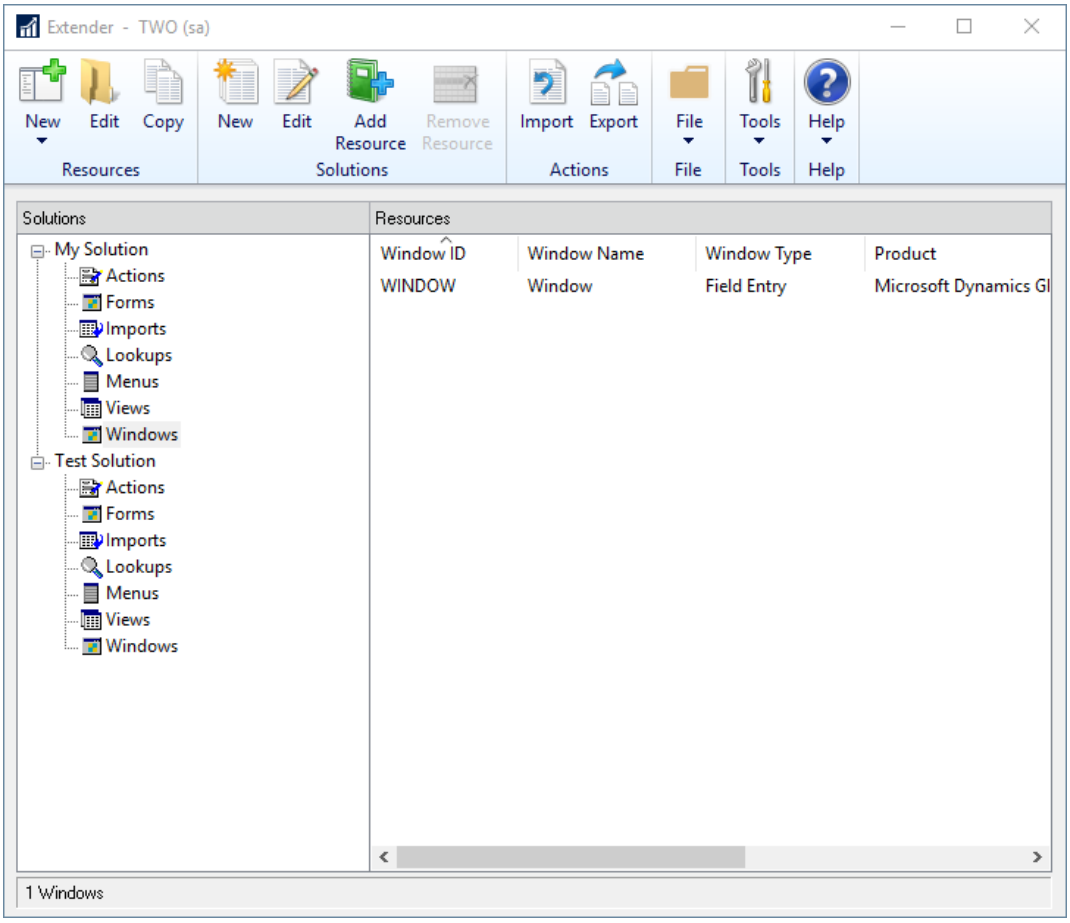
3. In the Add Solution window, enter a Solution Name.



4. Click the Save button.

Displaying Resources

The resource explorer is divided into two panels, the Extender Solutions list and the Extender Resources list. The Extender Solutions list displays all resource types within each solution. The Extender Resources list displays all resources for the selected Extender Object within the Solution.



To display a list of resources:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Solution you want to view the Resources for.
3. Select the Resource Type that you want to view the Resources in.

Adding New Resources

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

To add a new resource:

Option 1:

1. Expand the Solution from the Extender Objects list.
2. Select the Solution Type from the Resource List in the Solution.
3. Click New.

Option 2:

1. Select the Solution from the Extender Objects list.
2. Click the drop down button next to the New button and select the Resource Type.

Opening Existing Resources

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

To open an existing resource:

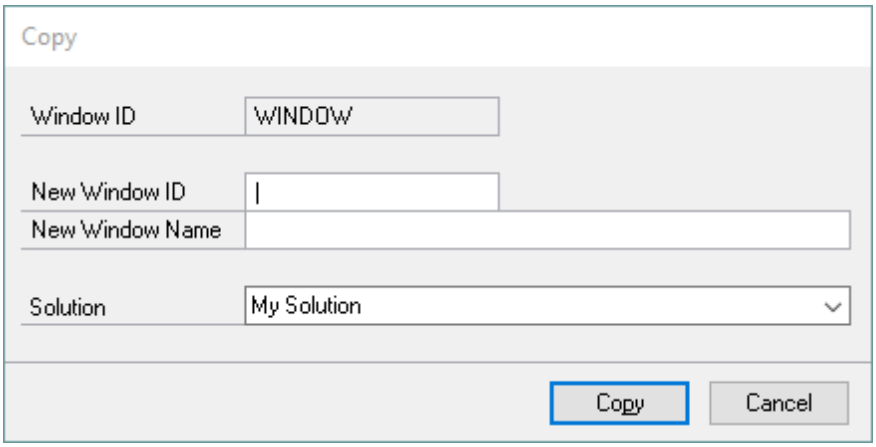
1. Select the Solution from the Extender Solutions list.
2. Select the resource type from within the solutions on the Extender Solutions list.
3. Select the resource that you want to open from the Extender Resources list.
4. Click Open or double-click on the resource.

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. This will make an exact copy of the resource and then allow you to customize them individually. Copying a resource will give you the option to copy it to the same Solution or a new Solution.

To copy an existing resource:

1. Select the Solution from the Extender Solutions list.
2. Select the Resource type from within the solution on the Extender Solutions list.
3. Select the resource that you want to copy from the Extender Resources list.
4. Click the Copy button.



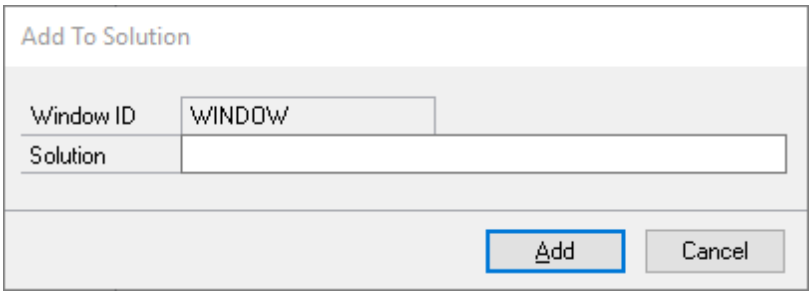
5. Enter the new resource ID in the Copy window.
6. Enter the new resource name in the Copy window.
7. Select the Solution that you want the new resource to be created in.
8. Click Copy.

Sharing Existing Resources

If you want to share a resource between Solutions, you can use the Add To Solution window. This will link the resources so that any setup changes you make on one of the resources will be reflected in the other solution as well. Any data entered into the resources is shared between the resources.

To Share an existing resource:

1. Select the Solution from the Extender Solutions list.
2. Select the Resource type from within the solution on the Extender Solutions list.
3. Select the resource that you want to copy from the Extender Resources list.
4. Click the Add button.



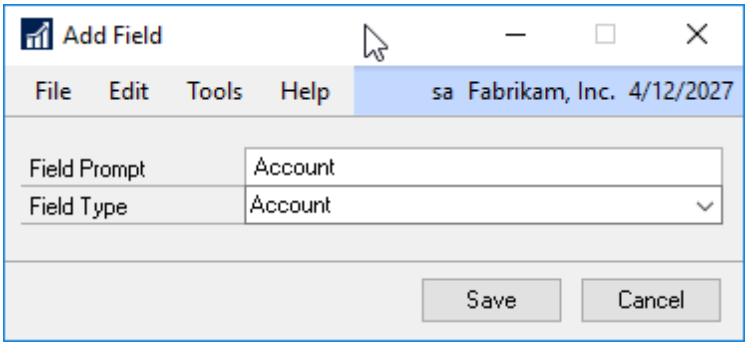
5. Select the Solution that you want the new resource to be created in.
6. Click Add.

Field Types

Enter topic text here.

Account

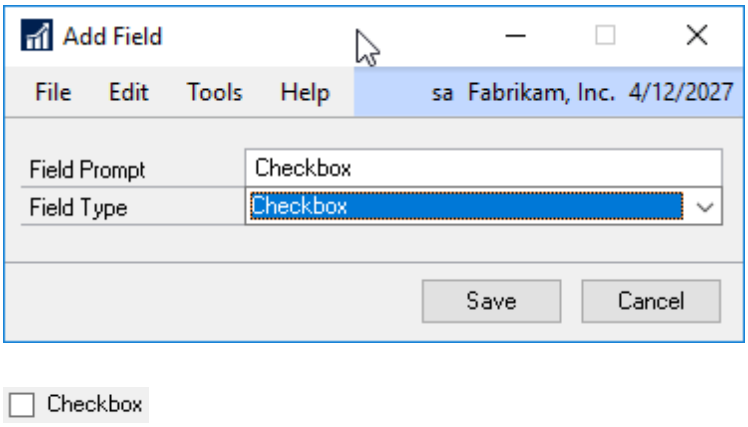
The account field is used to record an Account Number from Microsoft Dynamics GP. A lookup button is provided with the Account Number to allow you to select the account from the Chart of Accounts.





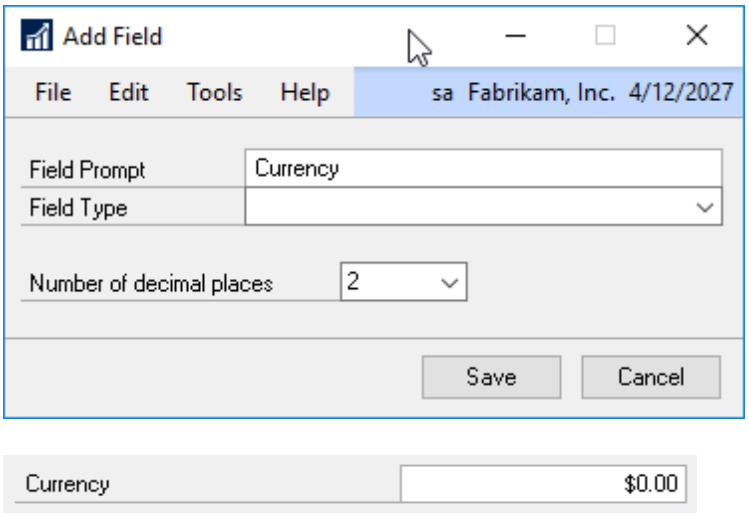
Checkbox

A checkbox field is used to record a true/false value. Mark the checkbox to indicate True and unmark the checkbox to indicate False. This stores as 1/0 in the table.



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. The Functional Currencies symbol is used on the currency. You can enter any currency amount from -$999,999,999,999.99999 to $999,999,999,999.99999.

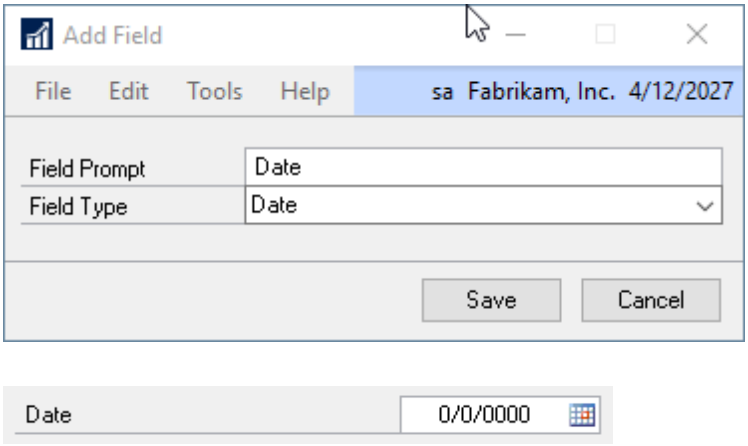


If Multicurrency Management is registered, currency fields can be displayed in functional and originating currencies. See the "Multicurrency" section for more

details of how to set up multicurrency for a form.

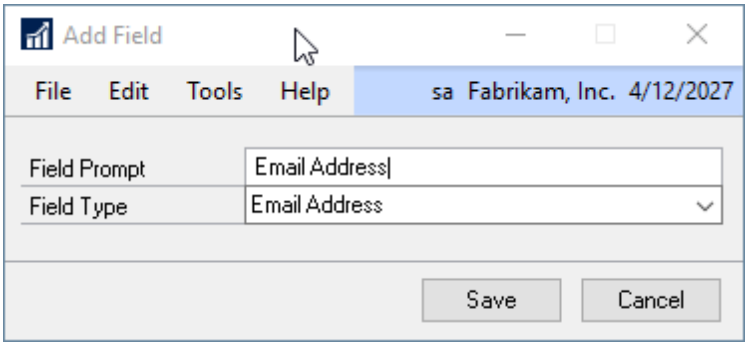
Date

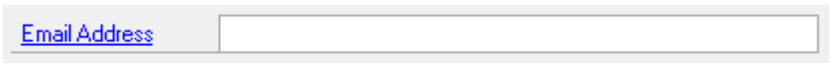
A date field allows entry and validation of a date value. There is no formatting available on dates.



Email Address

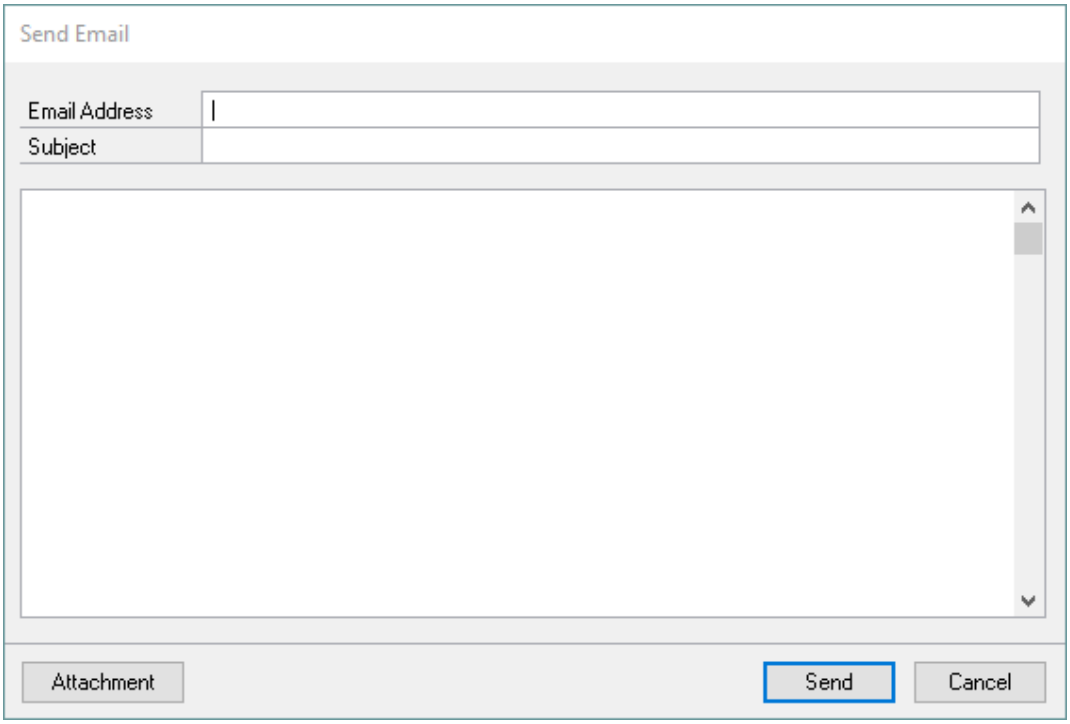
An email field allows entry of an email address. When an email field is added to an Extender resource, you can use this field to send emails. You can add up to 255 characters in this field.



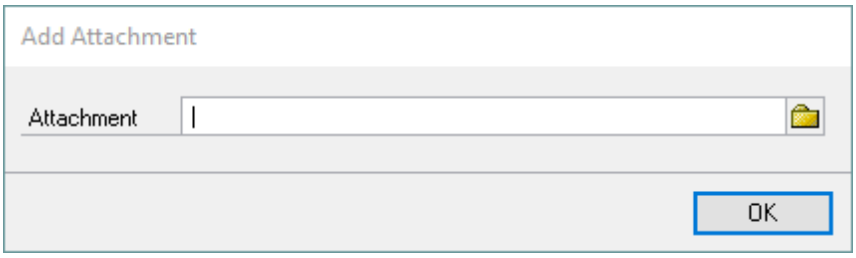


To send an email from an email field:

1. Click the Email field prompt.



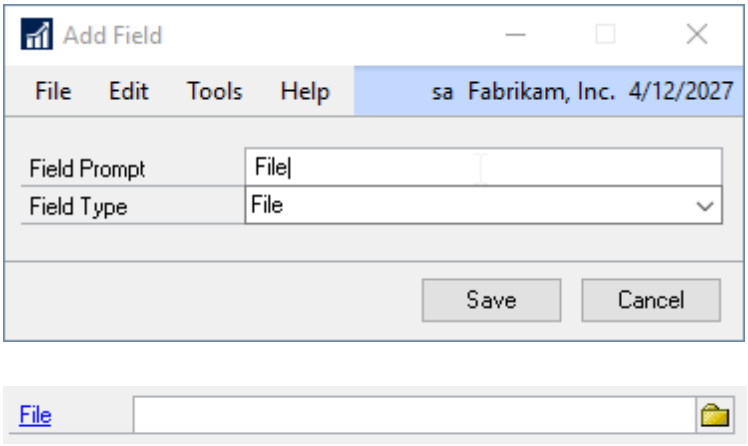
2. If the Email Address wasn't entered in the Extender previously, enter in the Address.
3. Enter the email Subject and body.
4. Click the Attachment button, enter a filename or browse to the file, and click OK if you want to add an attachment.



5. Click Send.

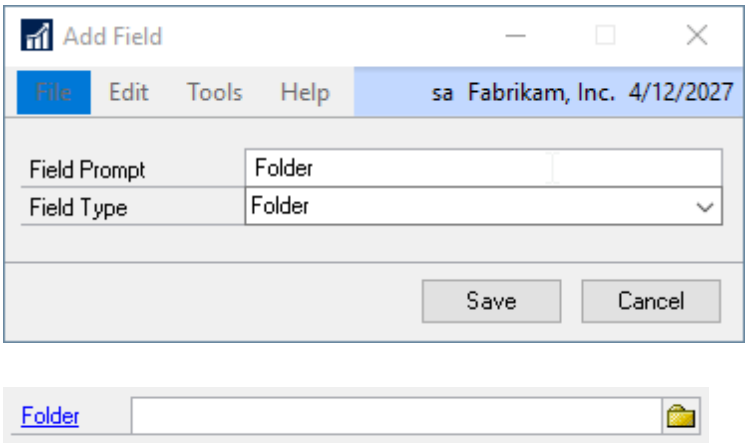
File

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. The file will be opened using the default application associated with the file extension. To open the file, simply click on the File field prompt. You can enter up to 255 characters in this field.



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. The folder field type can also be used with web addresses. If you enter a web address in a folder field, the site will be pulled up in the default web browser. You can enter up to 255 characters in this field.



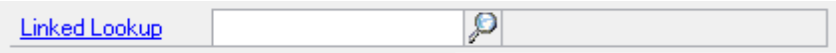
Linked Lookup

A linked lookup allows you select a lookup that is related to another lookup that is already on the Window or Form. For example, to setup the Vendor Addresses Linked Lookup, you must already have a lookup on the Window or Form for the Vendor ID. The linked lookups that are available are Customer Addresses, Vendor Addresses, Vendor Items and Item Units of Measure.

If Microsoft Lync is running on the same system as Microsoft Dynamics GP, presence

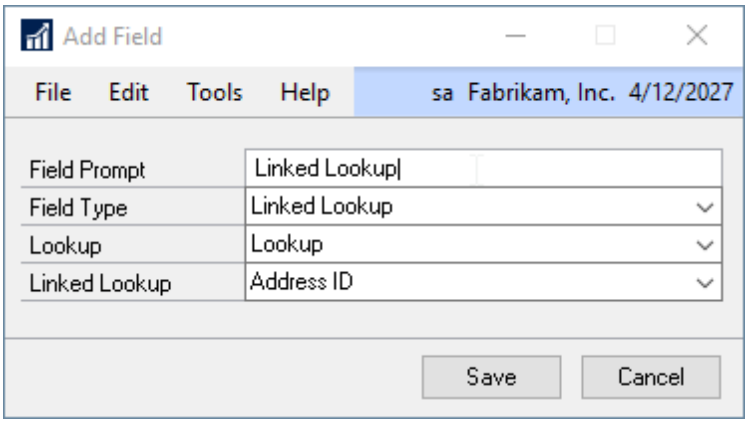
information can be displayed for the following linked lookup fields:

- Customer Address
- Vendor Address



To set linked lookup options:

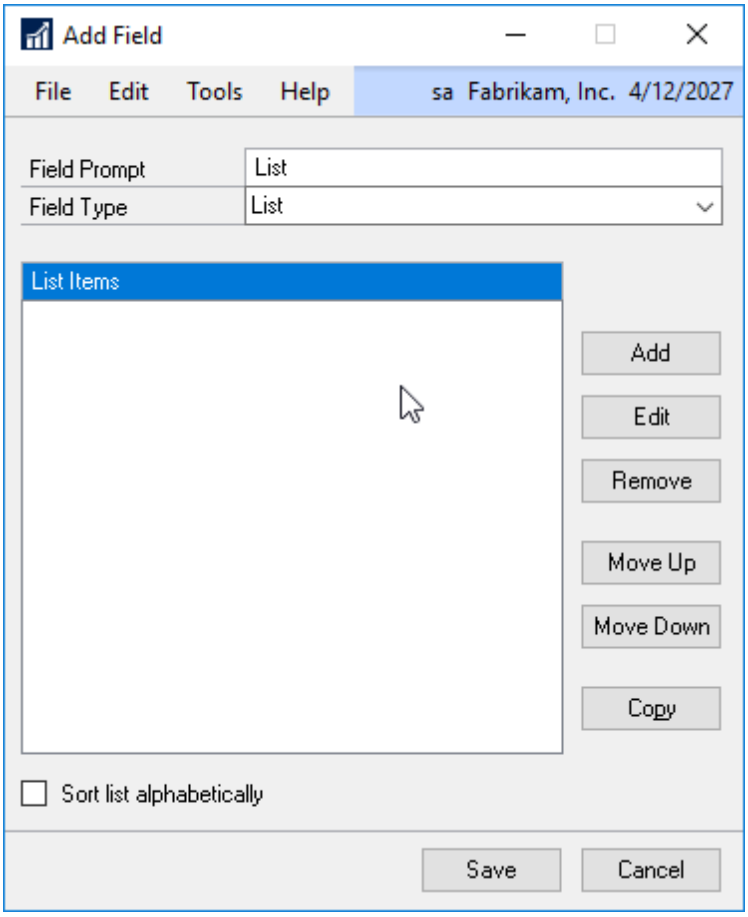
1. Add a Field to the Window or Form.



2. Enter the Field Prompt.
3. Select the Field Type of Linked Lookup.
4. Select the Lookup Field to link to.
5. Select the Linked Lookup.
6. Click Save.

List

A list field provides a drop down list of values. You can define the Items in the list in the setup of the List field.

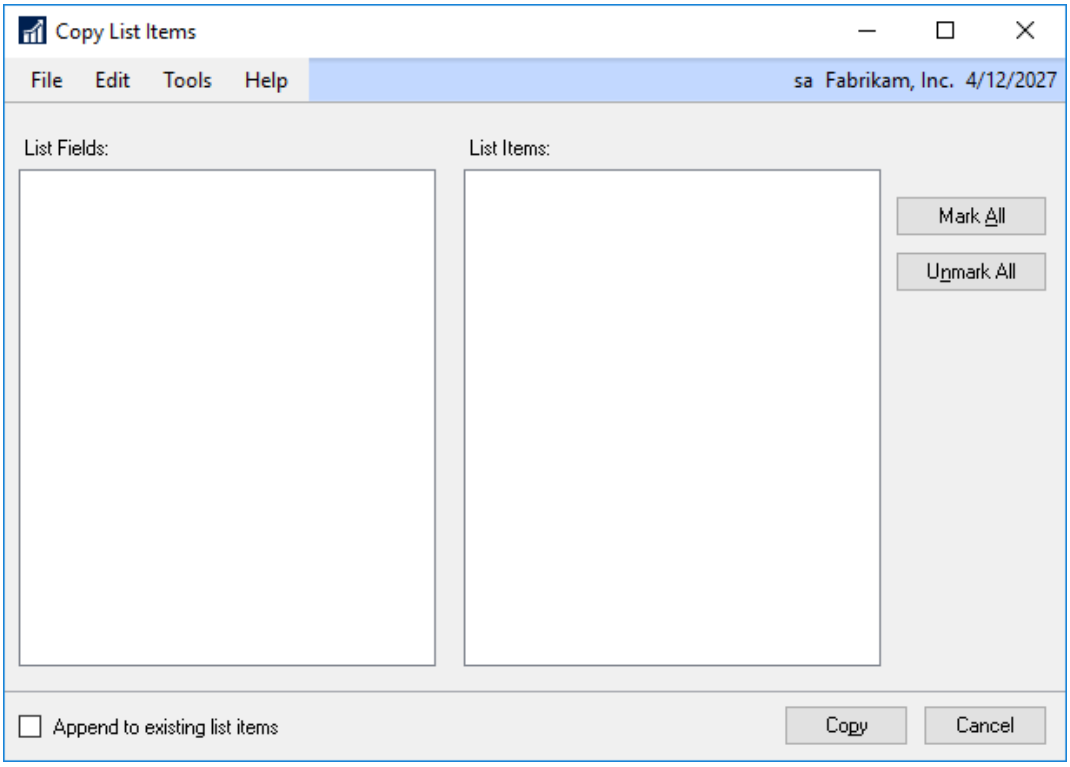


Lists items are saved as an Integer value for their place in the list. For this reason, you never want to change the list items that already exist if data has been entered. If the list items are changed, the data associated with the previous list item will now be associated to the new list item. New items should be added to the bottom of the list. Using the Move Up and Move Down buttons will allow you to move list items around and keep the data associated correctly. As you move the fields around in the list using these buttons, Extender remaps the data to them. Sorting the list doesn't affect this. It only orders them alphabetically in in the window. It doesn't change their value in the table.



To copy an existing list:

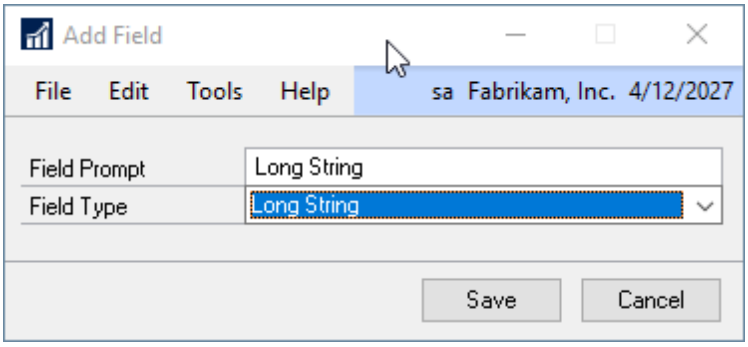
1. Click Copy.



2. Select the list that you want to copy.
3. Select the list items that you want to copy.
4. If you want to add items to an existing list, mark the “Append to existing list items” option. If this option is not marked, any existing list items will be overwritten.
5. Click Copy.

Long String

A long string field allows for up to 255 characters to be entered. There is no formatting on Long Strings. While you can enter in 255 characters, if putting this field onto a Report Writer report, it will only display the first 80 characters.

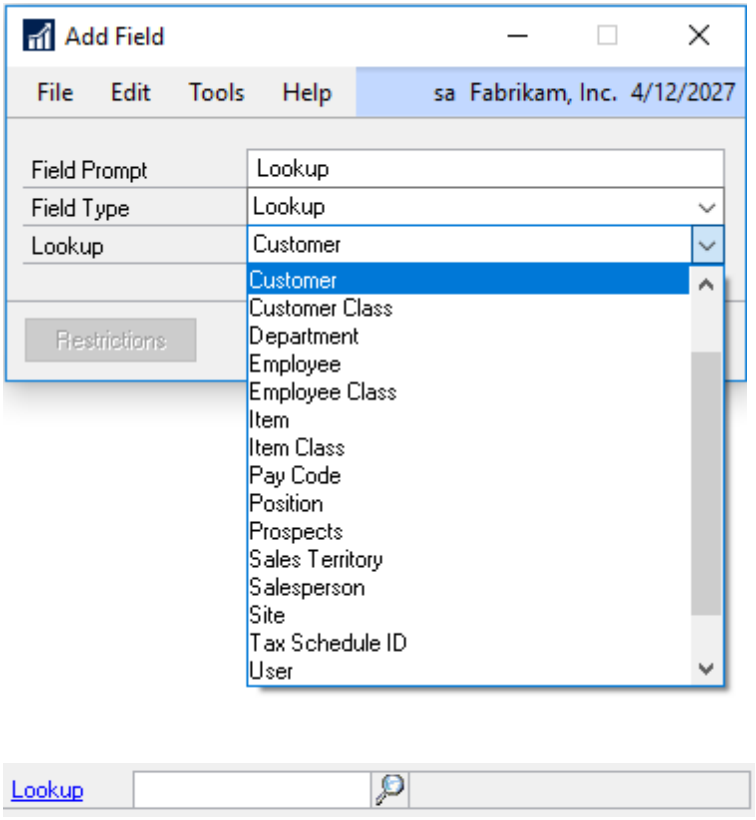




Lookup

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 Company, Currency, Customer, Customer Class, Department, Employee, Employee Class, Item, Item Class, Pay Code, Position, Prospects, Sales Territory, Salesperson, Site, Tax Schedule ID, User, User Class, and Vendor.

Lookups can also be created from Extender Forms. Restrictions can be added to the lookup if the lookup is based on an Extender Form.



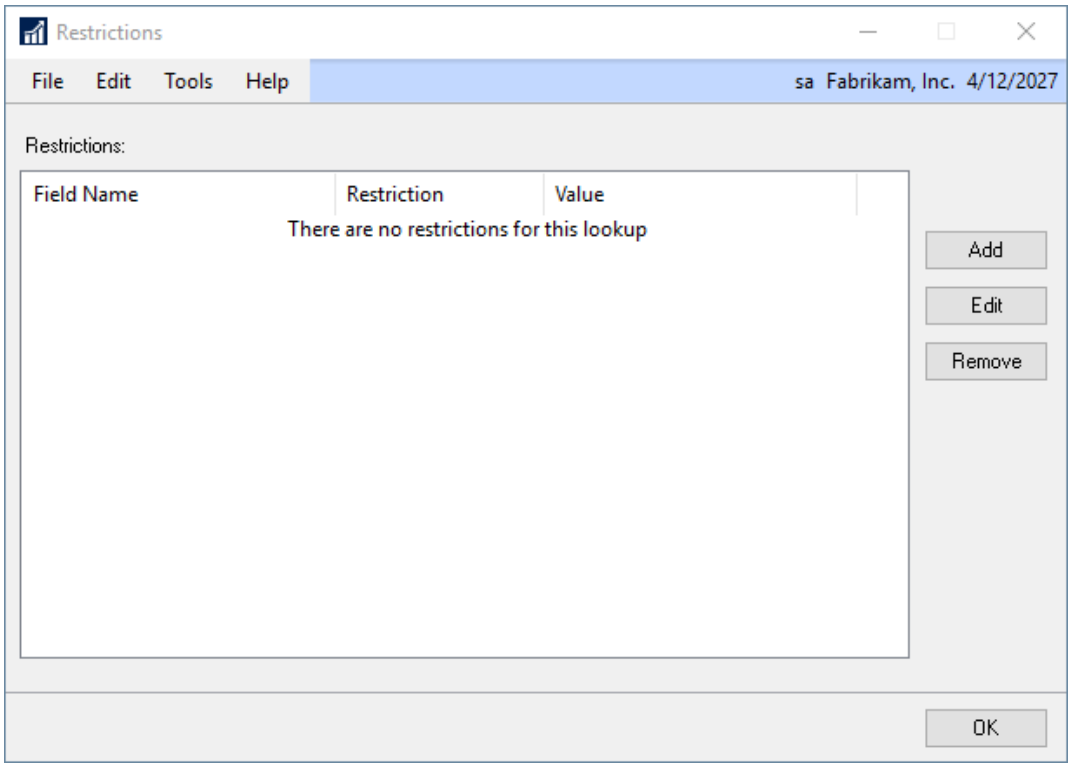
If Microsoft Lync is running on the same system as Microsoft Dynamics GP, presence information can be displayed for the following lookup fields:

- Customer
- Vendor
- Employee
- Salesperson

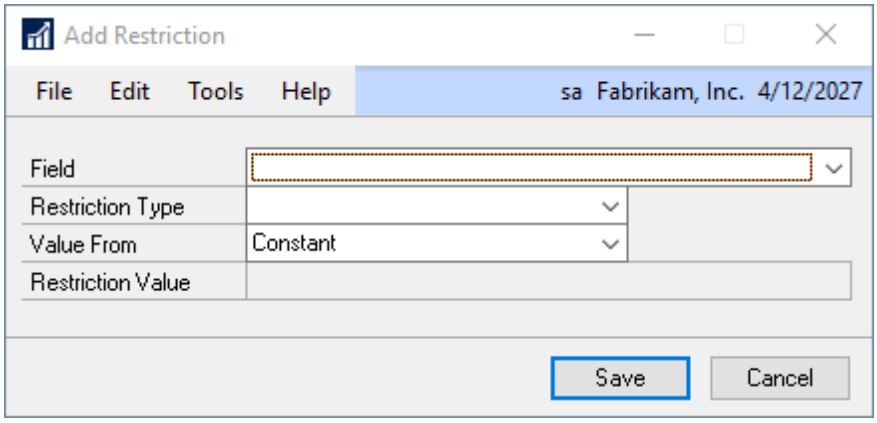
You cannot drill back on a custom lookup unless it goes back to a Form.

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.



2. Click on the Add button beside 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:

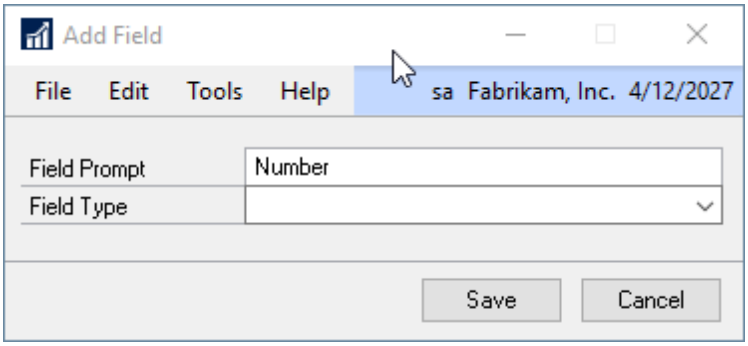
1. Select the restriction that you want to edit from the Restrictions list.
2. Click on the Edit button beside the Restrictions list.
3. Enter the new values for the restriction.
4. Click on the Save button

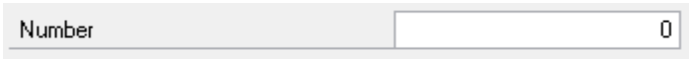
To remove a restriction:

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

Number

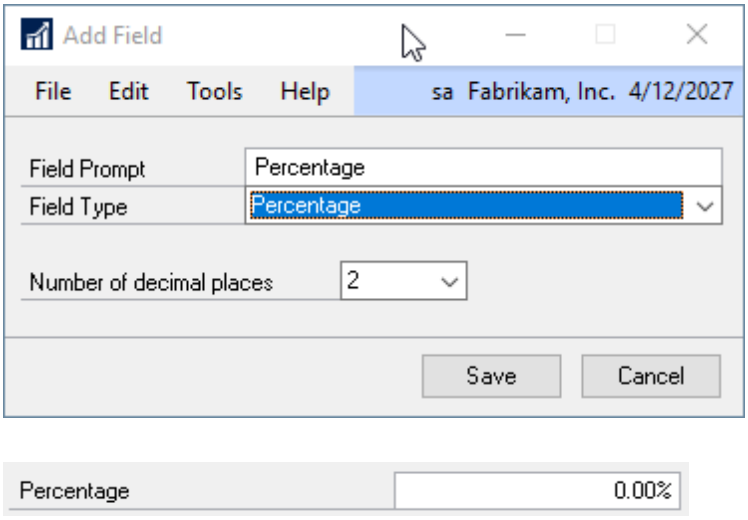
A number field is used to enter numbers with no decimal places. There is no formatting available. You can enter any number between -1,410,065,407 and 1,410,065,407. If a number outside of this range is entered, it will automatically be changed to one of these values, depending on if the value is negative or positive.





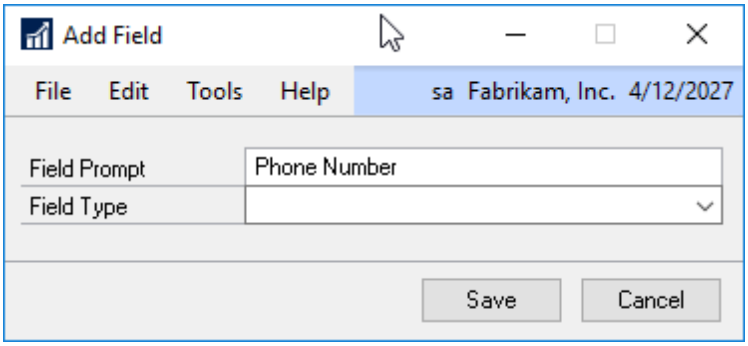
Percentage

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 -999.99999% and 999.99999%.



Phone Number

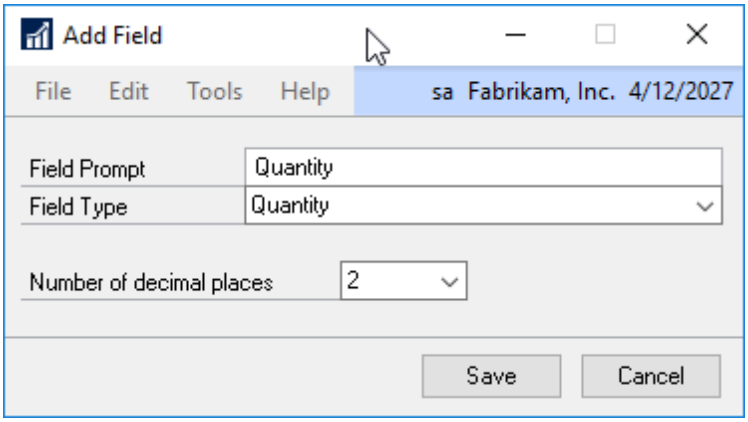
A phone number field allows for entry of a phone number formatted in your chosen Microsoft Dynamics GP phone number format.





Quantity

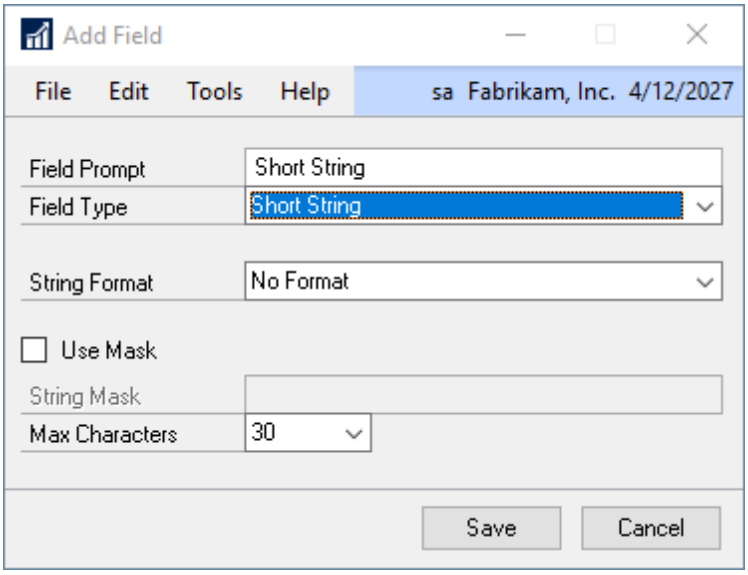
A quantity field is used to enter quantity amounts. You can select the number of decimal places for a quantity field as a number between 0 and 5. You can enter any quantity between -99,999,999,999,999.99999 and 99,999,999,999,999.99999.





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 five 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:

Mask	String	Formatted String
XXX-XXXX-XX	123456789	123-4567-89
q: XXX (X)	ABCD	q: ABC (D)

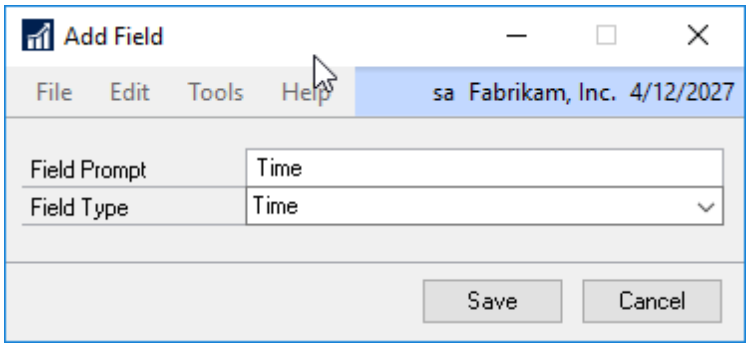
The string mask is useful when you need to format a phone number in a non-US format. The special characters in the mask don't save in the table. One the actual data is stored and the mask is applied when displaying the data.

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.



Time

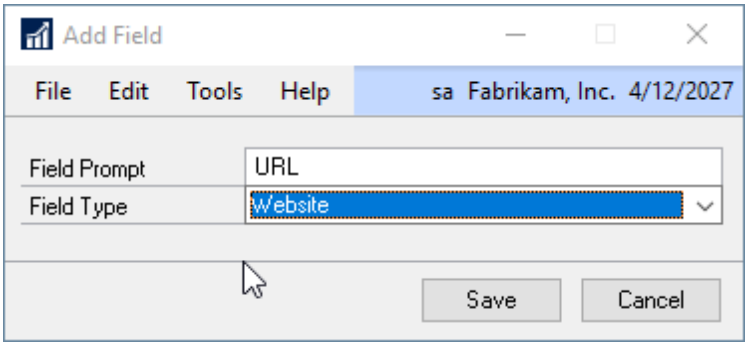
A time field allows entry and validation of a time value. The display format will be based on the settings of the workstation, but the entry format is in a 24-hour format.





Website

A Wetsite field is used to enter web addresses. If you enter a web address in a Website field, the site will be pulled up in the default web browser. You can enter up to 255 characters in this field.





Calculated Field

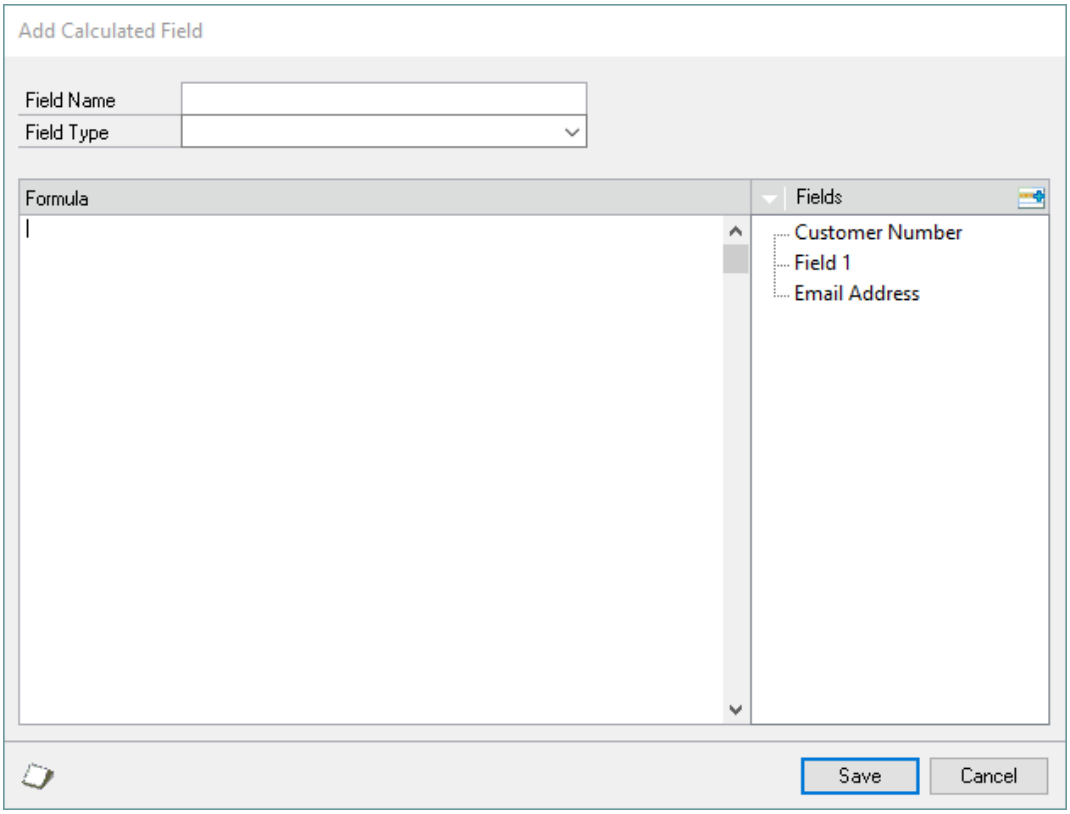
A calculated field allows the entry of a formula. Calculated fields are entered using SQL syntax.

There are 5 field types that can be used for the calculated field; Currency, Number, Percentage, Quantity, and Short String.

The calculated data is not stored. All calculations are done on the fly when the data is retrieved.

To add a calculated field:

1. Select the Field you want the Calculated field to be in.
2. Click the Add Calc button.



3. Enter a Field Name for the calculated field.
4. Select the field type. If you selected Currency, Percentage or Quantity for the Field Type, select the number of decimal places as well.
5. Enter the script for the calculation. By clicking on the drop down arrow on the header in the Fields/Functions section, you can switch back and forth between the Fields and Functions available.
    a. Add fields from the Extender Window/Form to the calculation by double-clicking on a field from the Fields list or selecting the field and clicking the Add button ( ).
    b. Add functions to the calculation by double-clicking on a function from the Functions list or by selecting the function and clicking the Add button ( ). The Functions list is displayed by selecting Functions from the View button above the Fields list.
    c. Add Constants to the calculation by clicking in the Formula section where the constant is to be placed and type in the constant.
6. Click Save.

Functions

Extender calculated fields can use all of the functions that are available in Transact-SQL. For convenience, the most common of these functions have been added to the functions list on

the Edit Calculated Field window. These functions are divided into five areas:

- Arithmetic Operators
- Date Functions
- Mathematical Functions
- System Functions
- String Functions

Removing Calculated Fields

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. Highlight the calculated field
2. Click the Remove Field Button.
3. When prompted with the message “Are you sure you want to remove this calculation?”, click Delete to remove the field.



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 the “Multicurrency” section for more details of how to set up multicurrency for a form.

While you cannot use one calculated field in another calculated field, you can copy the setup of a calculated field into another. This is especially useful when you have complex calculations that are performed in more than one location in Extender.

Field Entry Window

This section will guide you through the creation of an Extender Field Entry Window. Extender Field Entry Windows are used to link new data to existing Microsoft Dynamics GP windows. You should use an Extender Field Entry Window when an existing Microsoft Dynamics GP window does not contain all of the data that you need to track. For example, you could use Extender Field Entry Windows to create a new window to track additional information against inventory items.

An Extender Field Entry Window allows for up to 30 fields to be added. You can add up to 10 detail fields to a Field Entry Window as well. Adding detail fields to a Field Entry Window will allow you to track multiple records against an existing Microsoft Dynamics GP record. For example, you could use the Detail fields to create a new window to track multiple contracts against an individual customer or vendor.

Window templates are available to default data into these fields. Once setup, the fields can be linked to existing SmartLists as well as Views can be created to allow for reporting on the additional data that is being collected.

Basic Setup

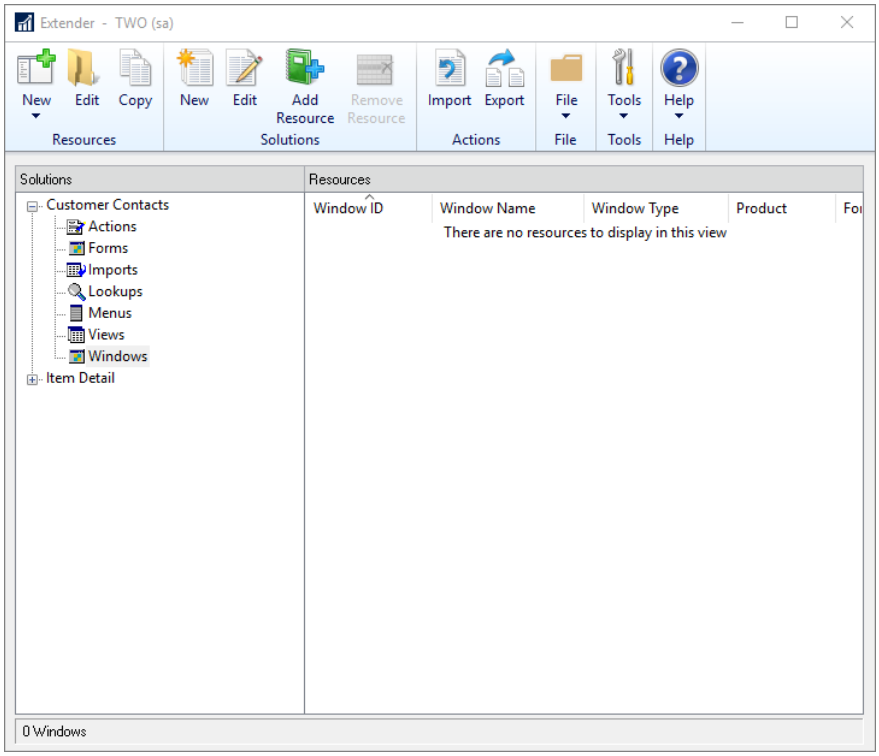
This module will walk you through the basic setup of a Field Entry Window.

Adding a New Window

Use the Extender Windows window to define new Windows.

To add a new Window:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Create a new window.
    a. Option 1:
        I. Expand the Solution that the window is to be added too.
        II. Select Windows from within the solution.
        III. Click New.

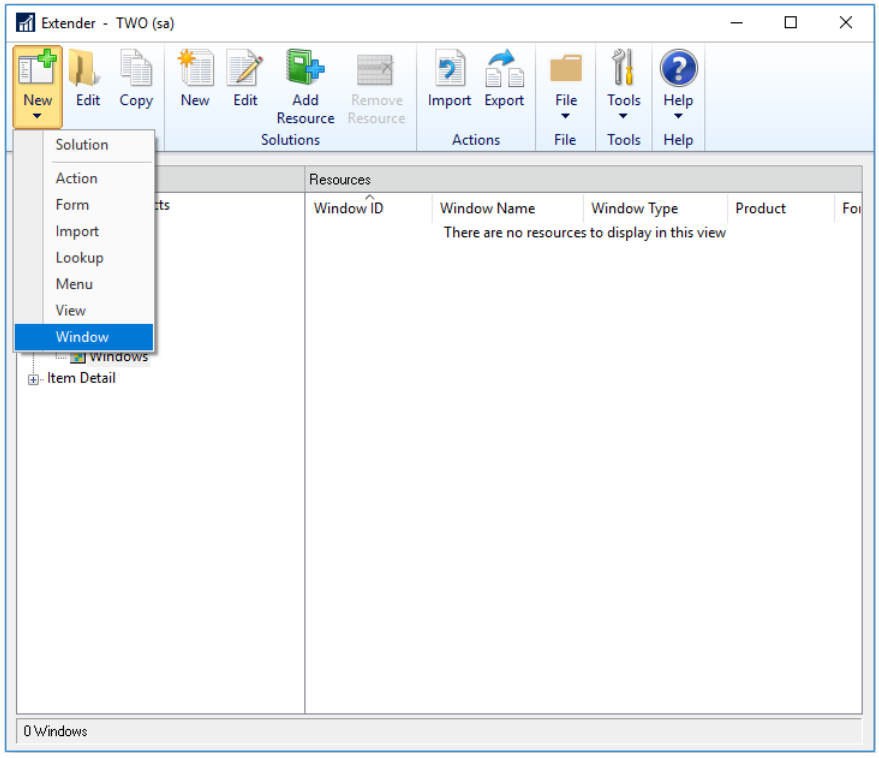


b. Option 2:

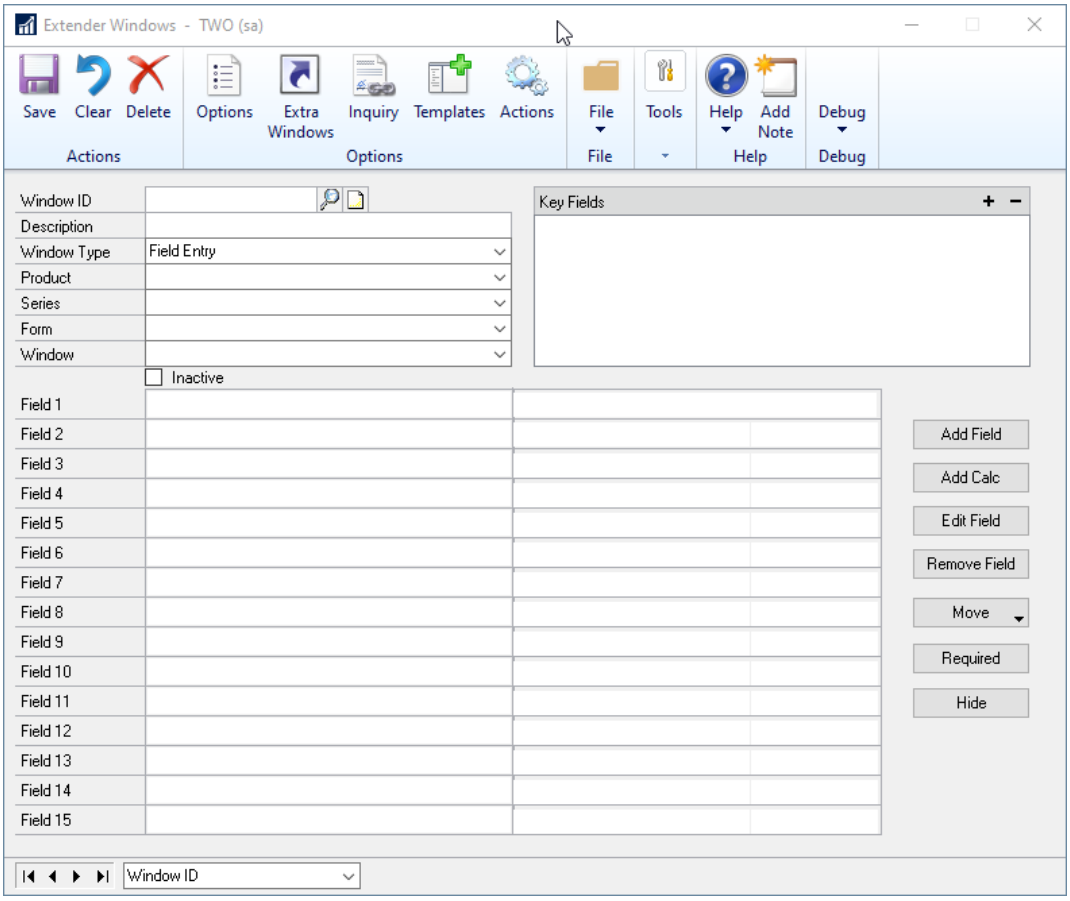
I. Select the Solution that the window is to be added too.

II. Click the drop down arrow next to the New button.

III. Select Window.



3. Enter an ID for the Window. This ID will only be referenced in Extender and needs to be Unique.



4. Enter a Description for the Window. The Description is what will be shown on the menus when you access the Window as well as on the title of the window.
5. Select the Window Type of Field Entry for a standard window.
6. Select the Product the window you are linking the Extender Window to is from. If you have additional or third party products installed with Microsoft Dynamics GP, make sure you know which product the window you are trying to link to comes from. Many times, the additional products can “replace” the standard Microsoft Dynamics GP window and you would need to pick that products window instead of Microsoft Dynamics GP.
7. Select the Series the window you are going to link to is in. Generally this will be the same as the Series that you would select from the menus to access the window.
8. Select the Form that the window you are going to link to belongs to. Many times, this is going to be the name of the window you are actually linking to, but if you have to open a window to get to the window you want to link to, then the Form would be the first window you have to open.
9. Select the Window to link the Extender Window to. This will generally be the same

as the Form you selected, but if you are opening a window to then open the window you want to link to, the Form would be the first window and the window would be the window you actually want to link to.

10. Add the appropriate key fields. See the next topic on Key Fields for more information on which fields you would want to use.
11. Enter prompts and select field types for fields 1 to 15 in rows 1 and 2.
12. Click Save.



You can add more than one window to a single Microsoft Dynamics GP form. Dexterity will only show the first few windows on the Additional menu list though.

Key Fields

Key fields are used to assign a unique identifier from a Microsoft Dynamics GP window to an Extender record. This is generally the required fields for the window. For example, the Key Field on the Customer Maintenance form is the Customer Number. There may be more than one key field required to create a unique identifier. For example, the Key Fields on the Customer Address Maintenance form would be the Customer Number and Address ID.

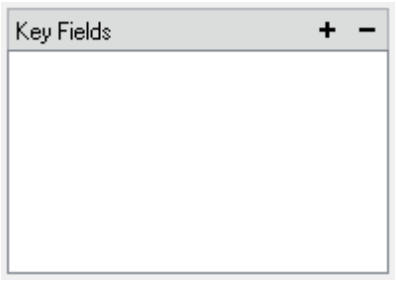
You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll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

When selecting the key fields the best thing to keep in mind is that this needs to be a unique identifier for the records and not something that might change. For example, using a Description or Name might not be a good key as that may change for a record. If you use a field that changes as the key field, when that record changes, the Extender data will no longer be linked. Likewise, if you have setup the window and entered data into the window and then change the key fields, the existing data will no longer be accessible through the window as the key it is looking for will not match any of the data.

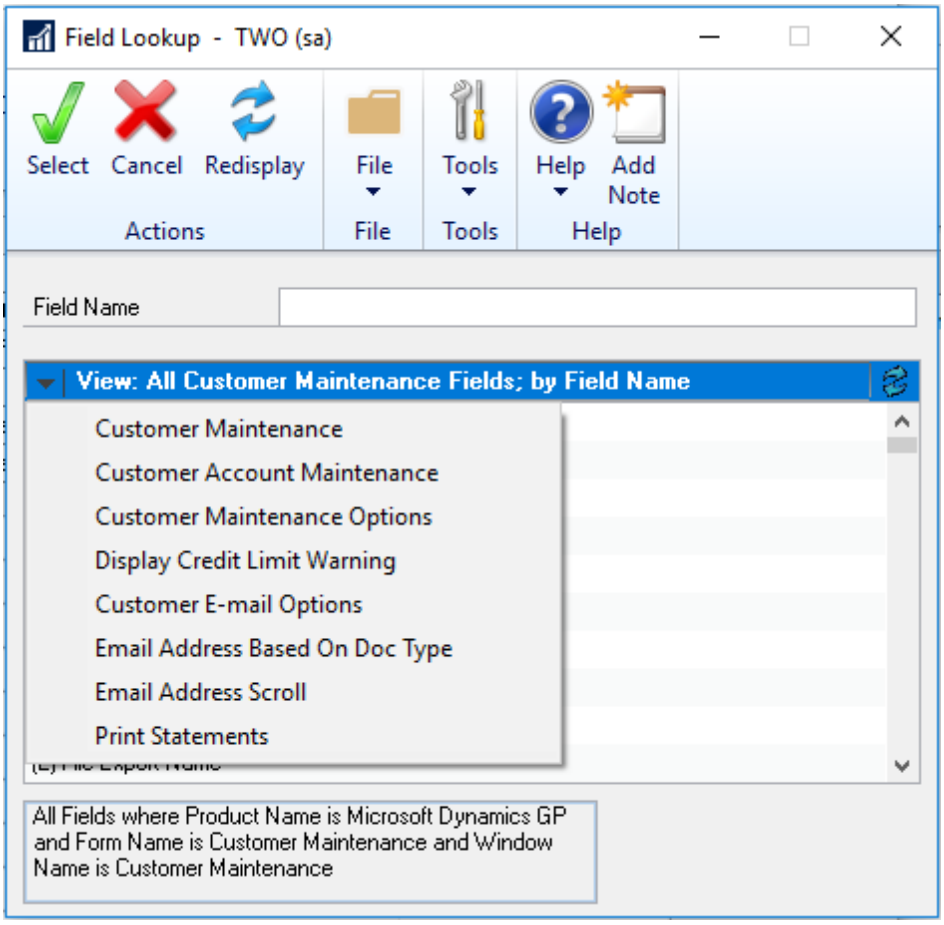
There are many forms that the Key Fields will default in automatically for you. It will set them to the default keys for that particular form. You can always edit these key fields if needed.

To add a key field:

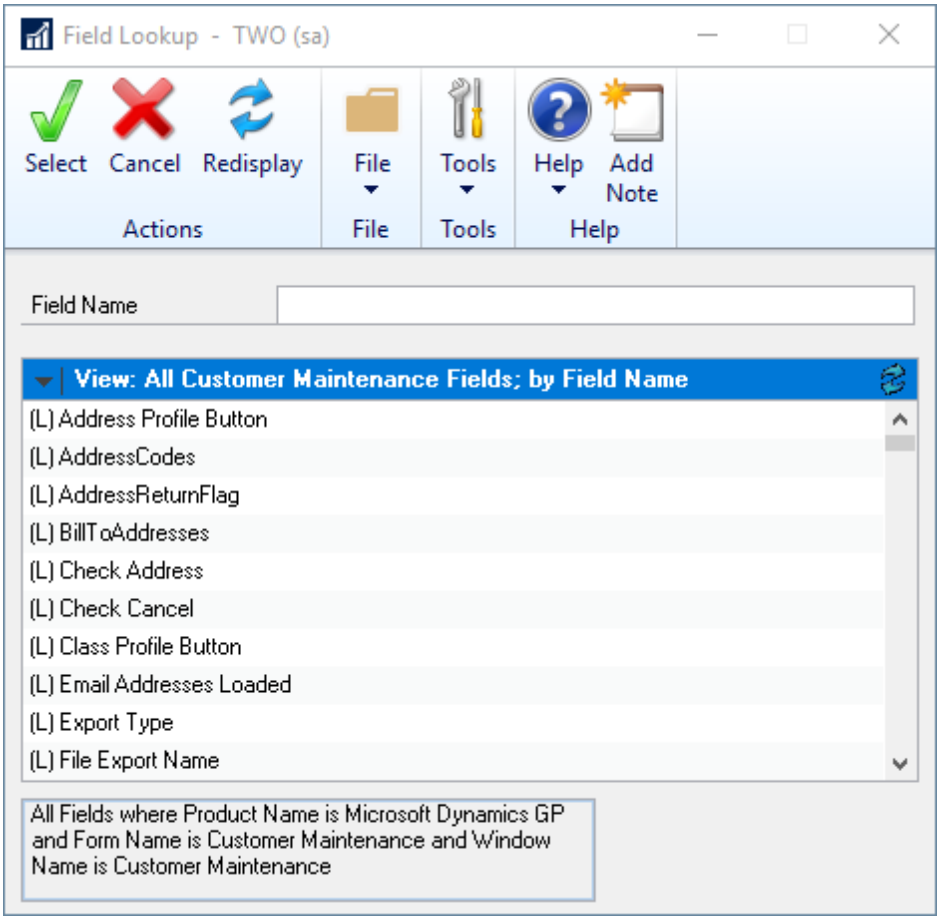
1. Click the Add button above the Key Fields list to open the Field Lookup window.



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.



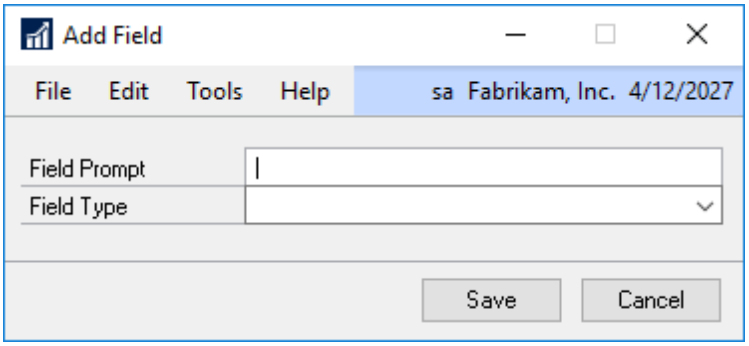
4. Click Select to add the selected field to the key fields for the Extender Window.

Adding Fields

On the window, you can add up to 30 fields using any of the data types discussed previously.

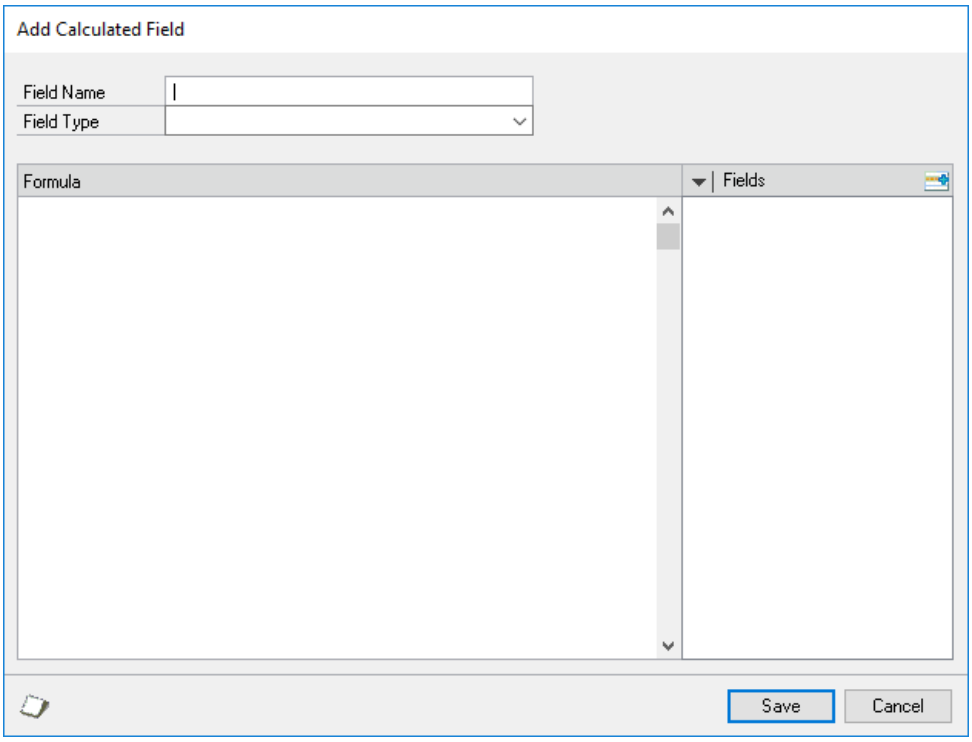
To add fields to an Extender Window:

a. Click in the field where you want to add the field.
b. Data Entry Field:
    a. Click the Add Field button to add a date entry field.



b. Enter the Field Prompt. This is what will be displayed on the window as the field description.
c. Select the Field Type for the field. Depending on the type selected, you may need to select additional information such as the number of decimal places.
d. Click Save.

c. Calculated Field
   a. Click the Add Calc button to add a calculated field.



   b. Enter the Field Name. This is what will be displayed on the window as the field description.
   c. Select the Field Type for the calculated field.
   d. Enter the Formula you want to use for the calculated field.
   e. Click Save.

Using Windows

A window can be immediately accessed for data entry as soon as it has been saved via the Additional menu on the Form that the window was linked to. The user interface of this new window is the same as any other window in Microsoft Dynamics GP.

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, or the field is not available, you will receive the error message “Not all required fields have been entered” when trying to use the Extender window.

3. Select the Extender Window from the Additional menu.
4. Enter values for each Extender Window field.
5. Click Save.

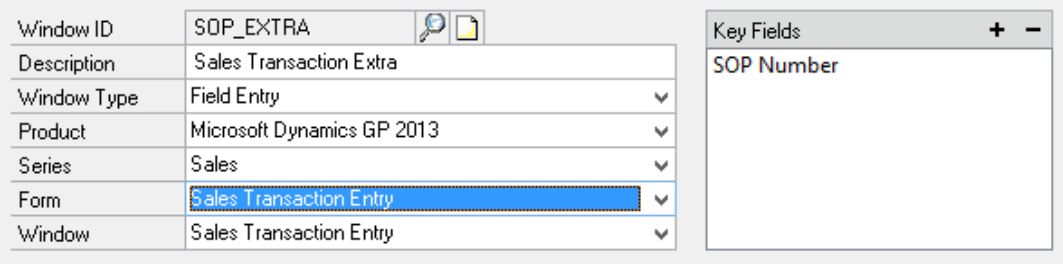
Special Cases

There are a number of Dynamics GP forms that have additional functionality when Extender Windows are linked to them:

- Sales Transaction Entry - transfers Extender Window records when sales transactions are transferred through the sales cycle. For example, when an order is transferred to an invoice, the Extender information entered on the order is duplicated on the invoice
- Item Maintenance - duplicates records from an Extender Window when an item is copied to a new item
- General Ledger Transaction Entry - duplicates records from an Extender Window when transactions are copied

To set up a sales transaction special case:

1. Open the Extender Windows window and enter a Window ID and Description.

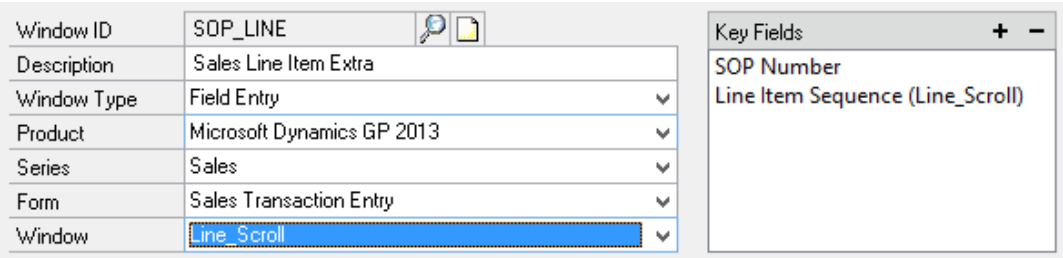


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Transaction Entry as the Form and Window.
5. Add SOP Number as the Key Field.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred with the document.

To set up a sales transaction line special case (method 1):

1. Open the Extender Windows window and enter a Window ID and Description.

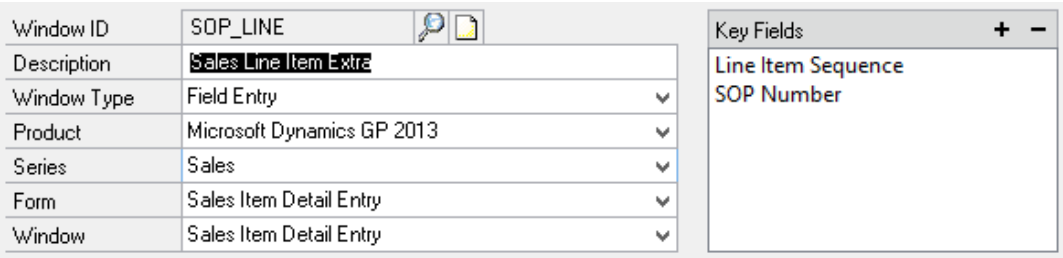


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Transactions as the Form.
5. Select Line_Scroll as the Window.
6. Add SOP Number from the Sales Transaction Entry window and Line Item Sequence from the Line_Scroll window as the Key Fields.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred with the document.

To set up a sales transaction line special case (method 2):

1. Open the Extender Windows window and enter a Window ID and Description.

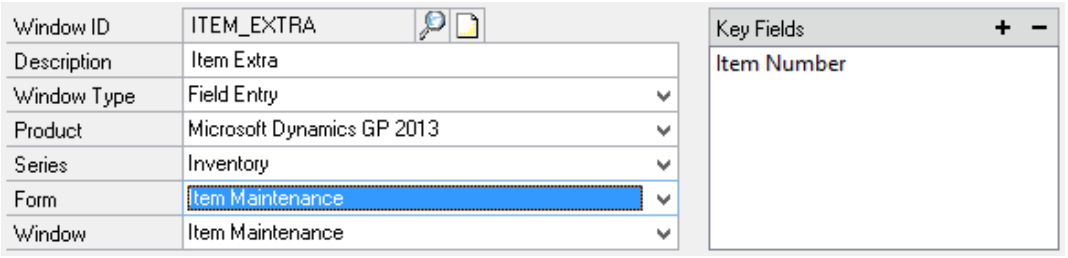


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Item Detail Entry as the Form and Window.
5. Add SOP Number and Line Item Sequence as the Key Fields.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred with the document.

To set up an item maintenance special case:

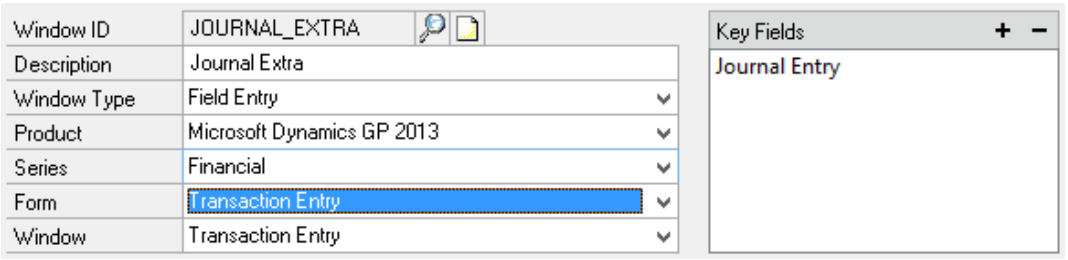
1. Open the Extender Windows window and enter a Window ID and Description.



2. Select Microsoft Dynamics GP as the Product.
3. Select Inventory as the Series.
4. Select Item Maintenance as the Form and Window.
5. Add Item Number as the Key Field.

To set up a general ledger transaction special case:

1. Open the Extender Windows window and enter a Window ID and Description.



2. Select Microsoft Dynamics GP as the Product.
3. Select Financial as the Series.
4. Select Transaction Entry as the Form and Window.
5. Add Journal Entry as the Key Field.

Modifying an Existing Window

You can make changes toaWindowusingtheExtenderWindows window.

To modify an existing Window:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Windows from the Extender Objects list.
3. Click Open or double-click on the resource.
4. Enter new information for the Window.
5. Click Save.

Setting Required and Hidden Fields

Setting a field to be required means that the field must be populated before the data can be saved, those fields must be populated. If a field isn't marked to be required, the user does not have to enter data into the field before saving the data.

To set required fields for a Window:

1. Select the Field you would like to make required.
2. Click the Required button. The text in the field should turn bold to indicate it is marked required.

Setting a field to be hidden means that the field will not appear on the window. It can still be used in the Calculations, Actions, etc.

To set hidden fields for a Window:

1. Select the Field you would like to make required.
2. Click the Required button. The text in the field should turn bold to indicate it is marked required.

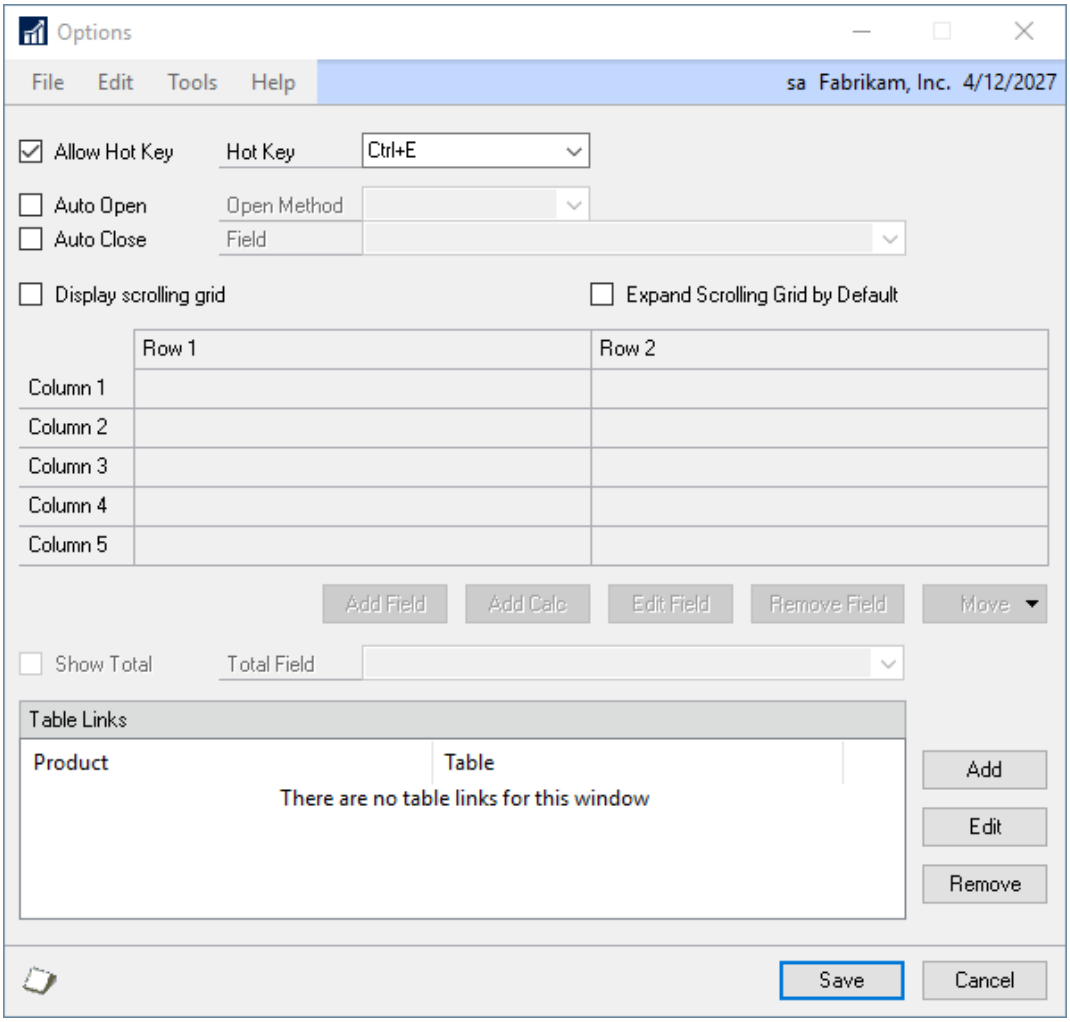
Setting Window Options

Use the Extender Windows Options window to assign a hot key and set auto open and close options for the Extender Window.

Hot Keys allow a user to open a window by using a set combination of key strokes, for example, CTRL+E. Once a Hot Key is set for a window, that combination is removed from the list of available hot keys.

To set a Hot Key for a Window:

1. Click Options.
2. Mark the Allow Hot Key option.



3. Select the Hot Key from the Hot Key list.
4. Click Save.
5. You will then need to re-launch Microsoft Dynamics GP for the Hot Key to work.

Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. 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.

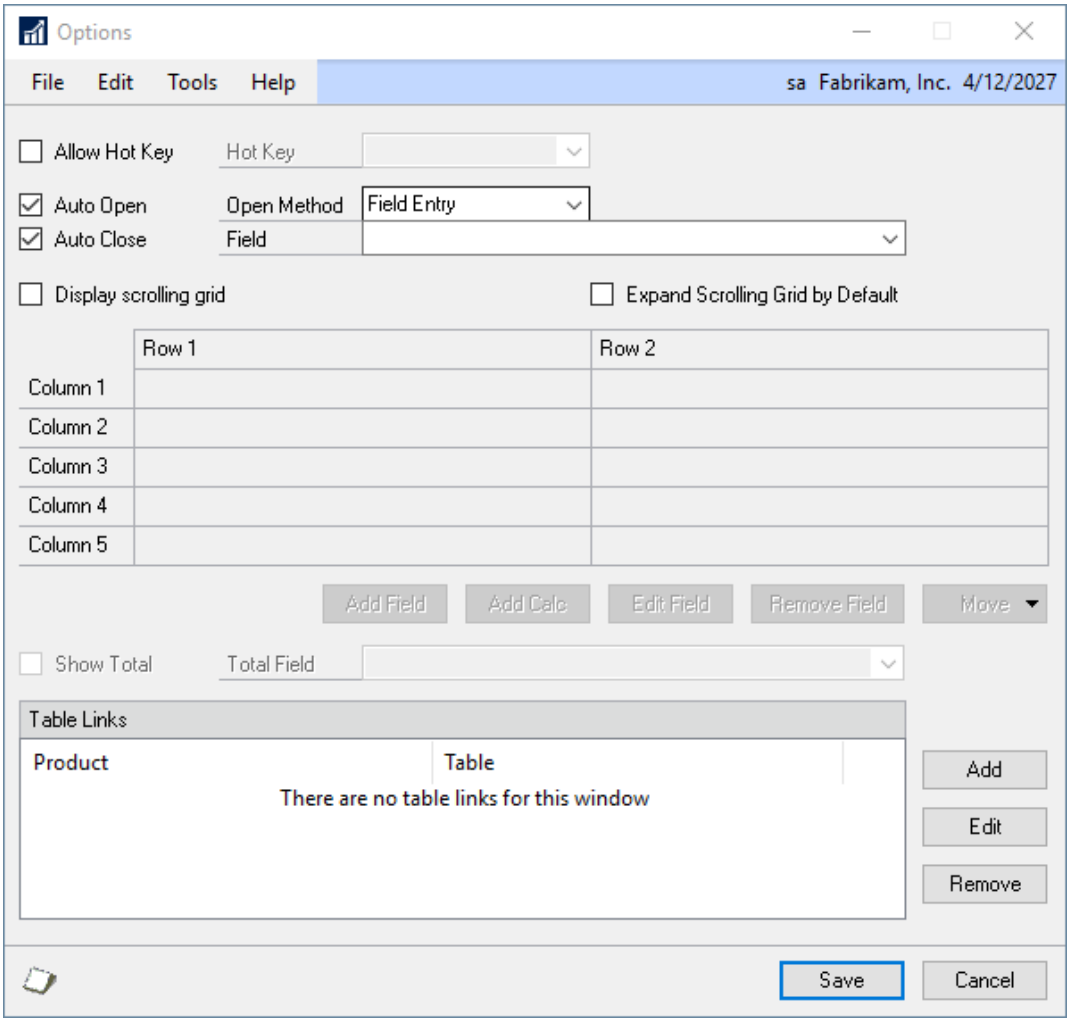


You should not use any of the key fields to trigger an auto open.

To set Auto Open and Auto Close options:

1. Click Options.

2. Mark the Auto Open option.



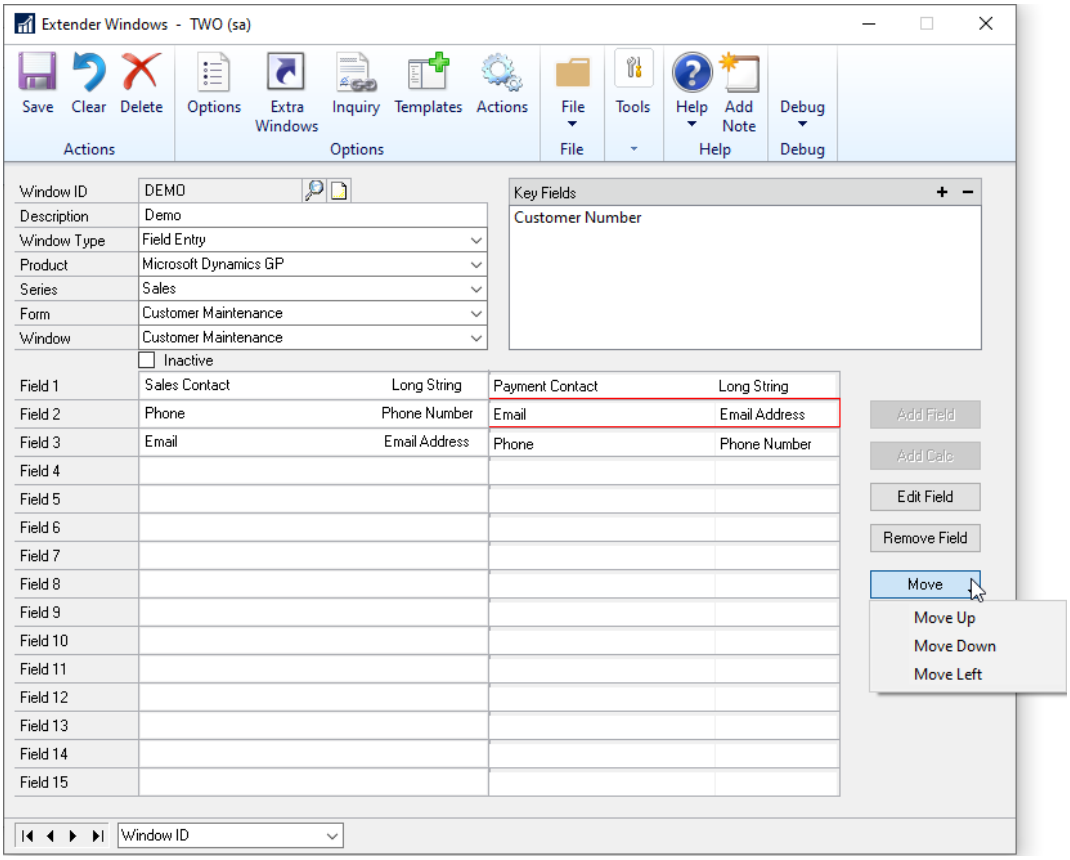
3. Select the Open Method. The three options are Field Entry, Field Exit, and Line Change. The Field Entry will trigger when you enter the field specified, whereas, the Field Exit will trigger when you exit the field specified. The Line Change option is to be used when you have detail on the window using the scrolling grid option. This will trigger when you move to the next line in the scrolling window.
4. Select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position in the Microsoft Dynamics GP window.
5. Click Save.
6. You will then need to re-launch Microsoft Dynamics GP to enable to Auto Open functionality.

Moving Fields

Once data has been entered into an Extender Window, the positions of the fields can be moved using the Move Fields button. This will move the data with it.

To move a field on the main Window a new position:

1. Open the Extender window that you want to move fields for.
2. Select the field you wish to move.



3. Click Move button and select the Move Up / Move Down / Move Left / Move Right options to the right of the Field List to move the field. If you move a field and another field already exists in that position, it will swap the two fields positions.

To move a field on the detail scrolling grid to a new position:

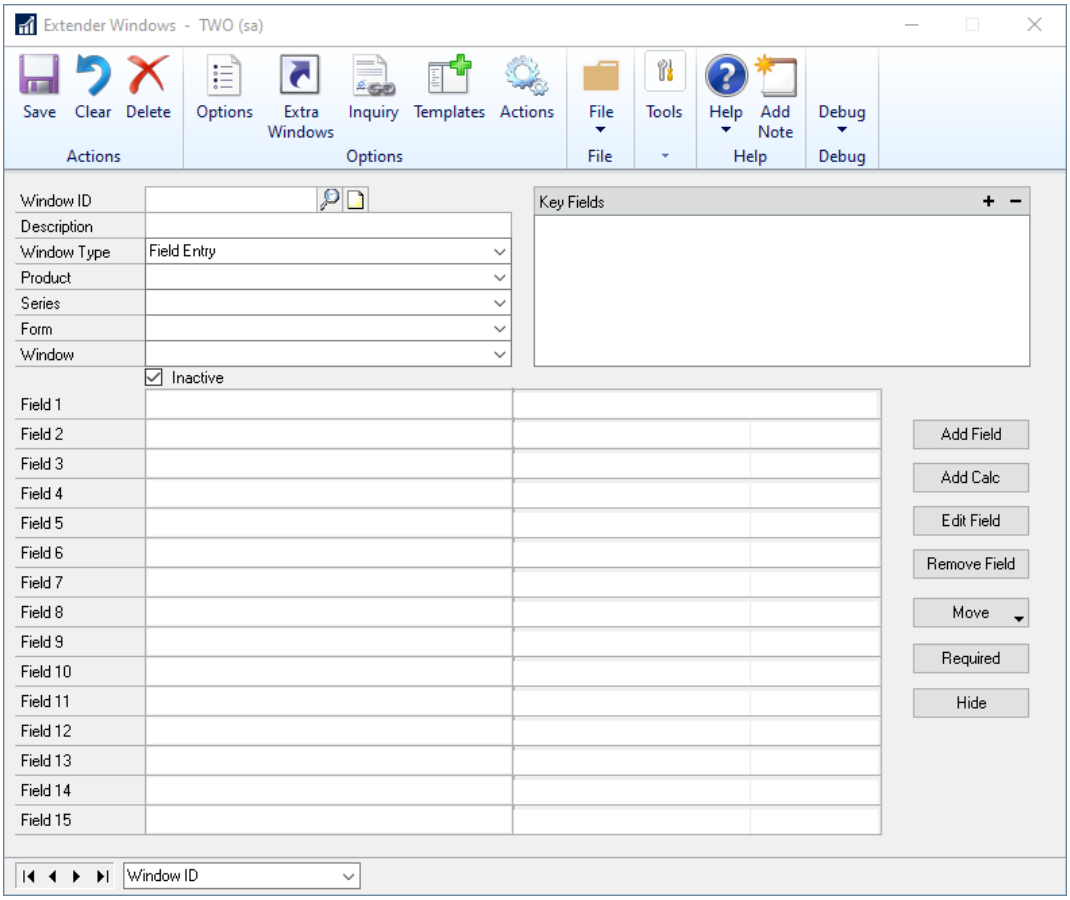
1. Open the Extender window that you want to move fields for.
2. Click the Options Button
3. Select the field that you want to move to a new position
4. Click the Move Drop down box below the Scrolling Grid fields and select the option that will move the field where you want to move it to. Depending on where the field is to be moved to, you may have to move the field several times to get it there.

Inactive Field Entry Window

If a there is a need to inactivate a window so that it isn't available from a Microsoft Dynamics GP window without removing the window, the Inactive check box can be used to do so.

To set a Field Entry window as Inactive:

1. Open the Extender window that you want to set as Inactive.
2. Mark the Inactive check box.



3. Save the Extender window.

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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Windows resource type under the Solution that the Window exists in.
3. Select the Window that you want to remove in the Extender Resources list.
4. Click Open.
5. Click Delete.
6. Click Delete when prompted to verify the deletion.

If you don't need the detail scrolling grid on a Window, you can remove it using the Extender Windows Option window.If you have already entered data into the scrolling grid, the data will also be deleted.

To remove the detail in the scrolling grid:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Windows resource type under the Solution that the Window exists in.
3. Select the Window that you want to remove in the Extender Resources list.
4. Click Open.
5. Click the Options button.
6. Uncheck the Display Scrolling Grid checkbox.
7. Click Save.
8. Click Save.

Detail

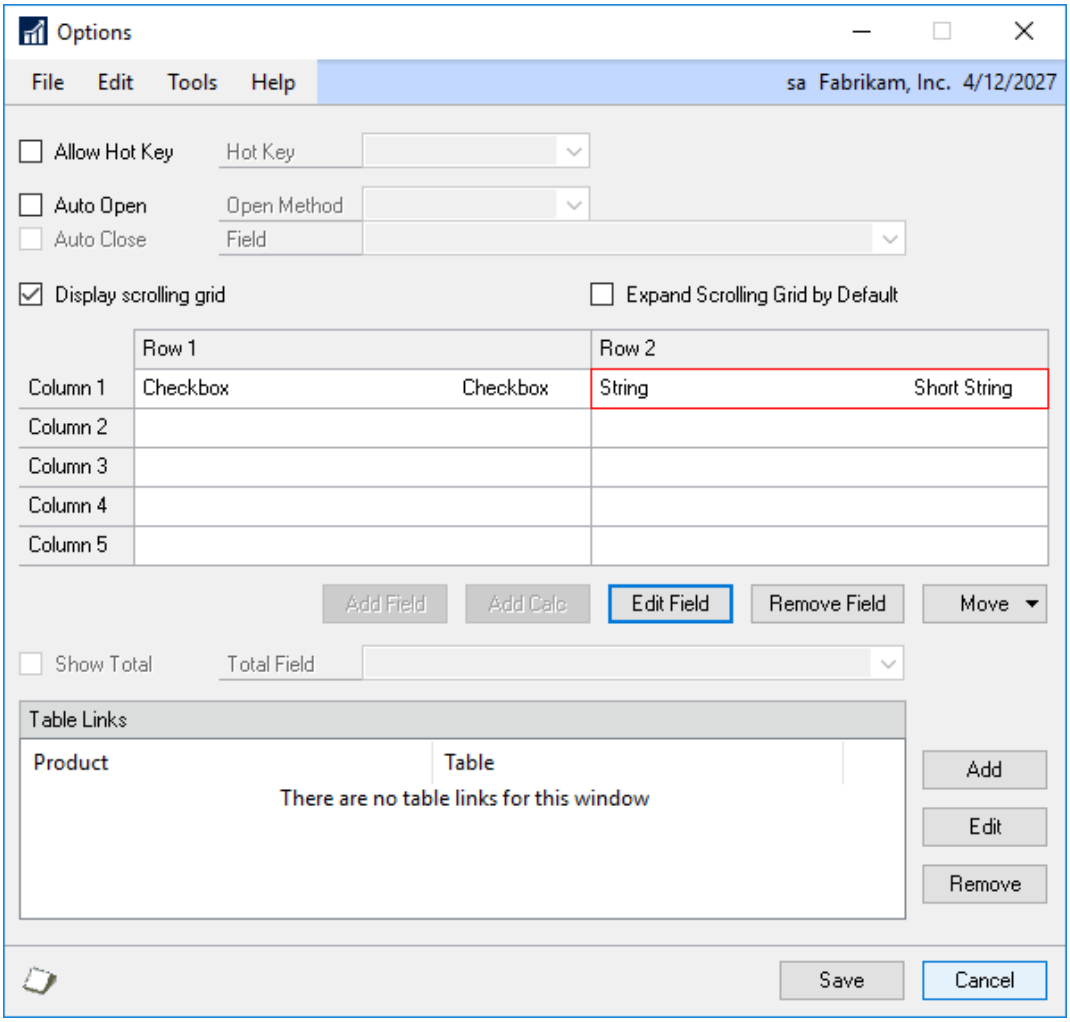
This module will walk you through adding detail fields to a Field Entry Window.

Add Detail Fields to a Window

Use the Extender Window Options window to define new Detail Fields. Adding Detail fields to an Extender windows adds a scrolling window portion to the window. This allows you to enter multiple records that correspond to the Key Field from the Microsoft Dynamics GP window. When adding detail to a window, it is not required that you have fields on the main Window setup. The Fields entered in the Window will be in the header portion of the window and the detail fields will be added to a scrolling window in the main Window.

To add Detail Fields to a Window:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Windows from within the Solution the Window exists in.
3. Select the Window you want to add the Detail Fields to.
4. Click Open or right click and select Open.
5. Click the Options Button.



6. Mark the Display scrolling grid checkbox.
7. Enter the fields you want in the detail in the same manner as you would on the main window. There are two rows for the detail. By default, the first row will display. As with most scrolling windows, you can expand it to view the second row.
8. If you want Row 2 to automatically be displayed, mark the Expand Scrolling Grid by Default checkbox.
9. Click Save.

Show Totals on Detail Field

When Detail Fields are added to a Window, the option to select a field to Show Totals on becomes available. The Show Total option will create a totaling field below the scrolling window based on the field selected. Only Number, Currency, Percentage and Quantity fields can be totaled. If there are no fields with these types, the Show Total option will not become available.

To select a field to be totaled:

1. Mark the Show Total check box. This check box will be enabled only if there are numeric (Number, Currency, Percentage and Quantity) fields on the window.
2. Select the field that you want to be totaled.
3. Click Save.

Table Links

This module will walk you through adding Table Links to a Field Entry Window.

Table Links

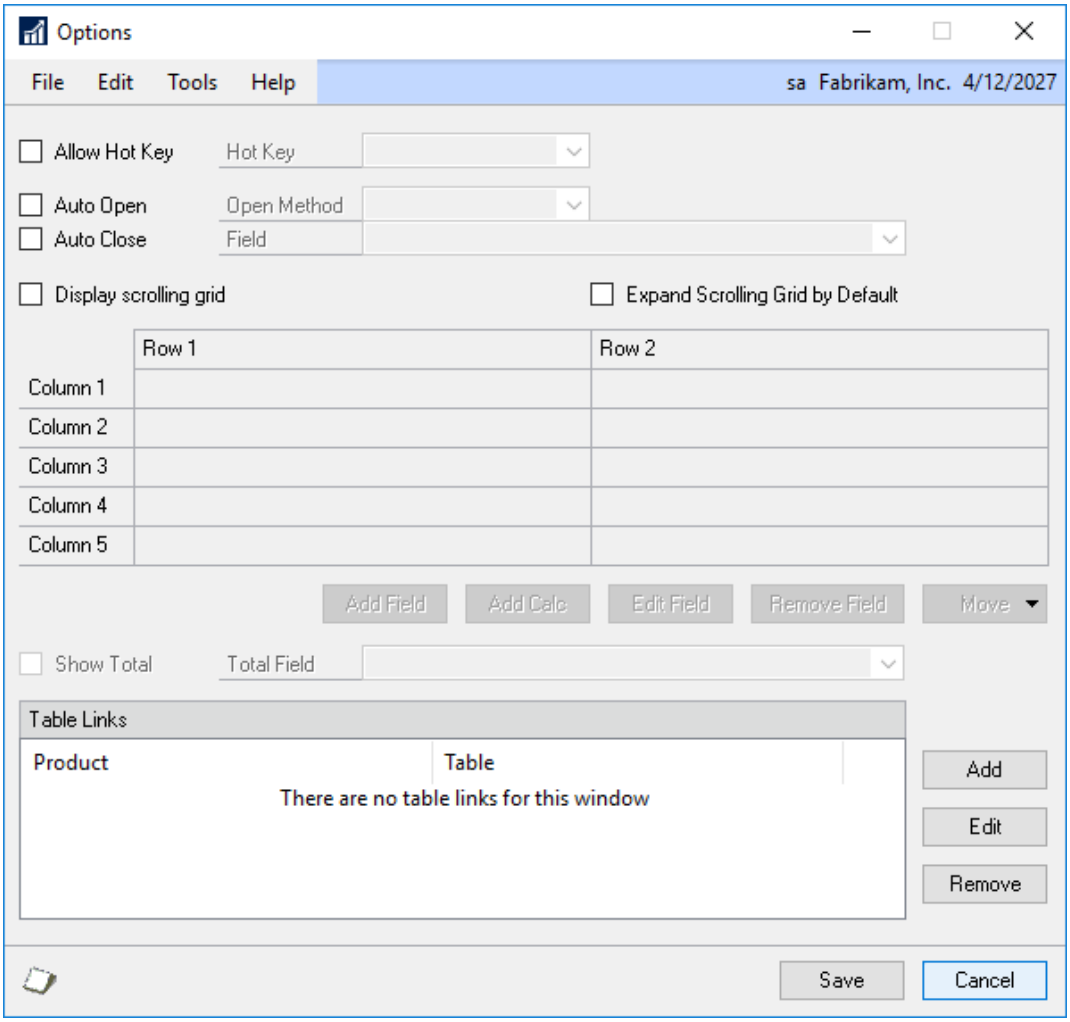
Linking an Extender Window to a table ensures that the Extender Window data is deleted when the corresponding table record is removed. A window can be linked to more than one table. When linked to more than one table, the Extender Window data will only be deleted when there is not a corresponding record in any of the linked tables.



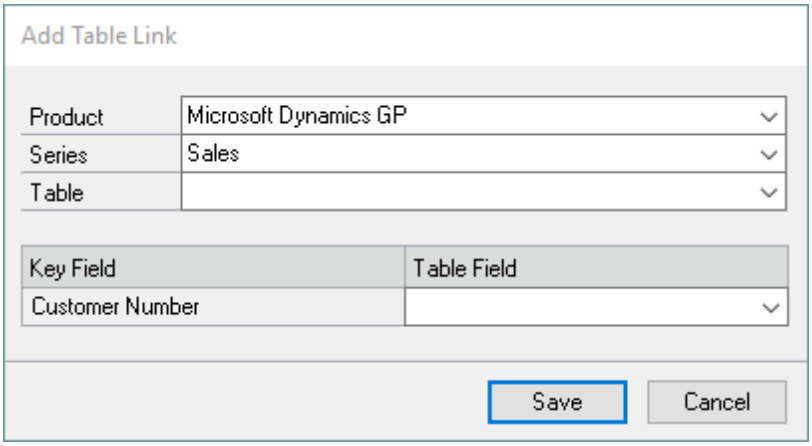
If you link an Extender Window to a work table and not the corresponding history table, the Extender data will be deleted when the record is posted because the data is removed from the work table during posting.

To link a window to a table:

1. Open the Extender Window that you want to link.
2. Click the Options button.



3. Click the Add button to the right of the Table Links list at the bottom of the Options window.



4. Select the Product, Series and Table that you want to link to.
5. Match the Key Fields on the window to fields in the Table.

6. Click Save.
7. Re-launch Microsoft Dynamics GP so that the Table Links work.

Extra Windows

This module will walk you through adding Extra Windows to an Extender Window.

Adding Extra Windows to a Window

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 Window.

There are 3 types of Extra Windows, Standard, Note, and Note List. A Standard extra window allows you to define 15 additional data entry fields. 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. If you are using Extender Enterprise, an additional Extra Window type will be available called Run Actions. The Run Action Window Type will allow you to add Extender Actions to the Extra Window button.

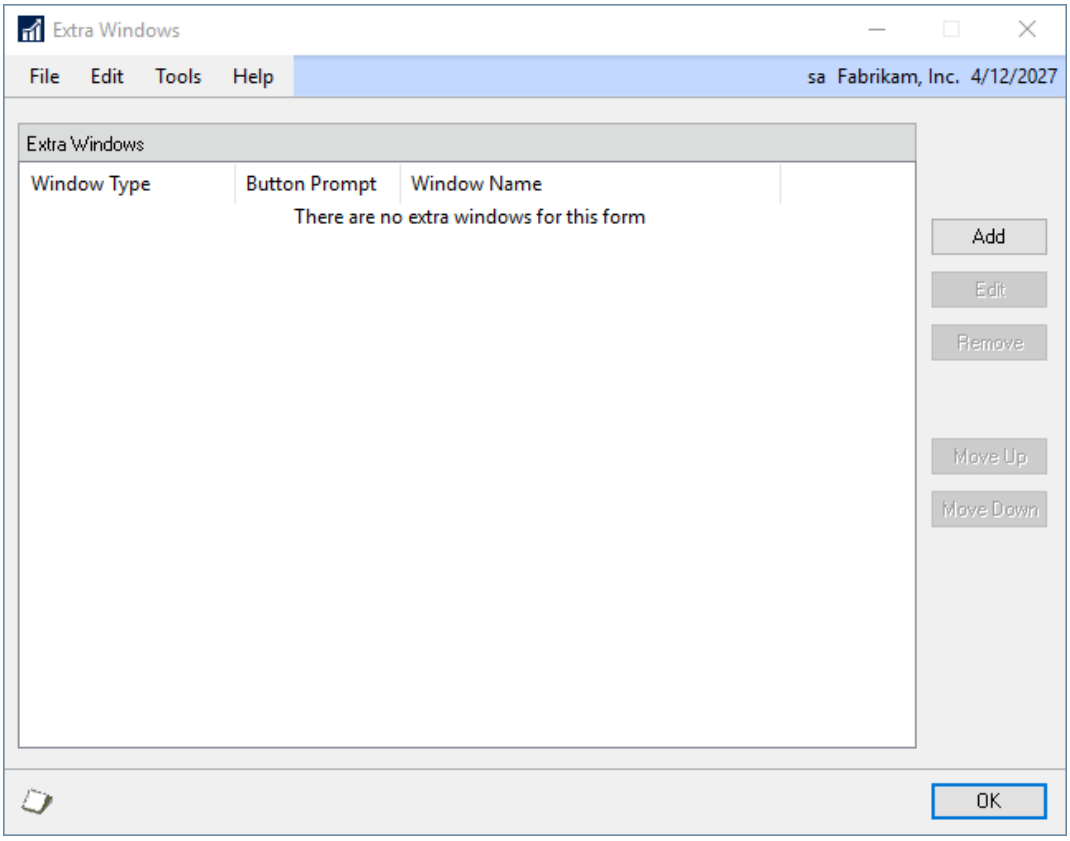
When an extra window is added to a Window, a button is added to the bottom of the Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the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



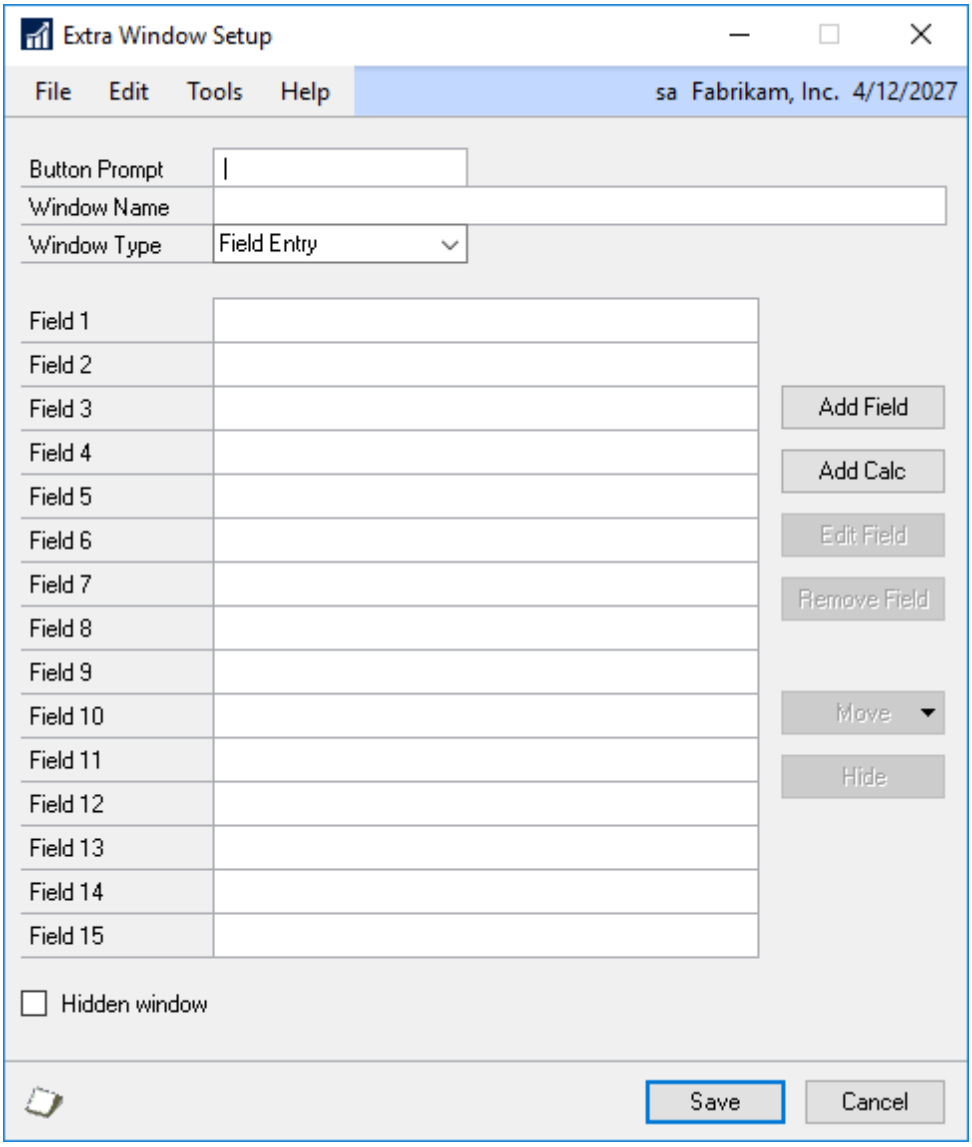
You can have a maximum of 50 extra windows on a Window. Only 8 of these windows are displayed on the main window. Other extra windows are accessible from the Extras menu.

To add an extra data entry window:

1. Click Extra Windows.



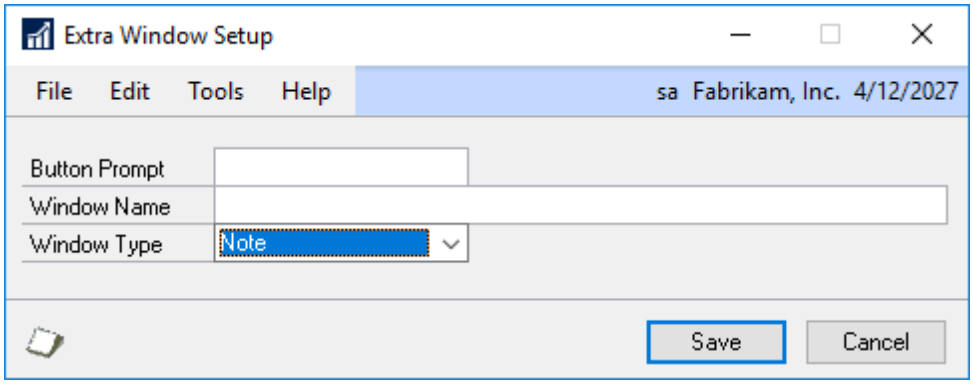
2. Click the Add button next to the Extra Windows list.



3. Enter a Button Prompt and Window Name.
4. Select Field Entry as the Window Type.
5. Enter prompts and select field types for fields 1 to 15.
6. Click Save.

To add a notes window:

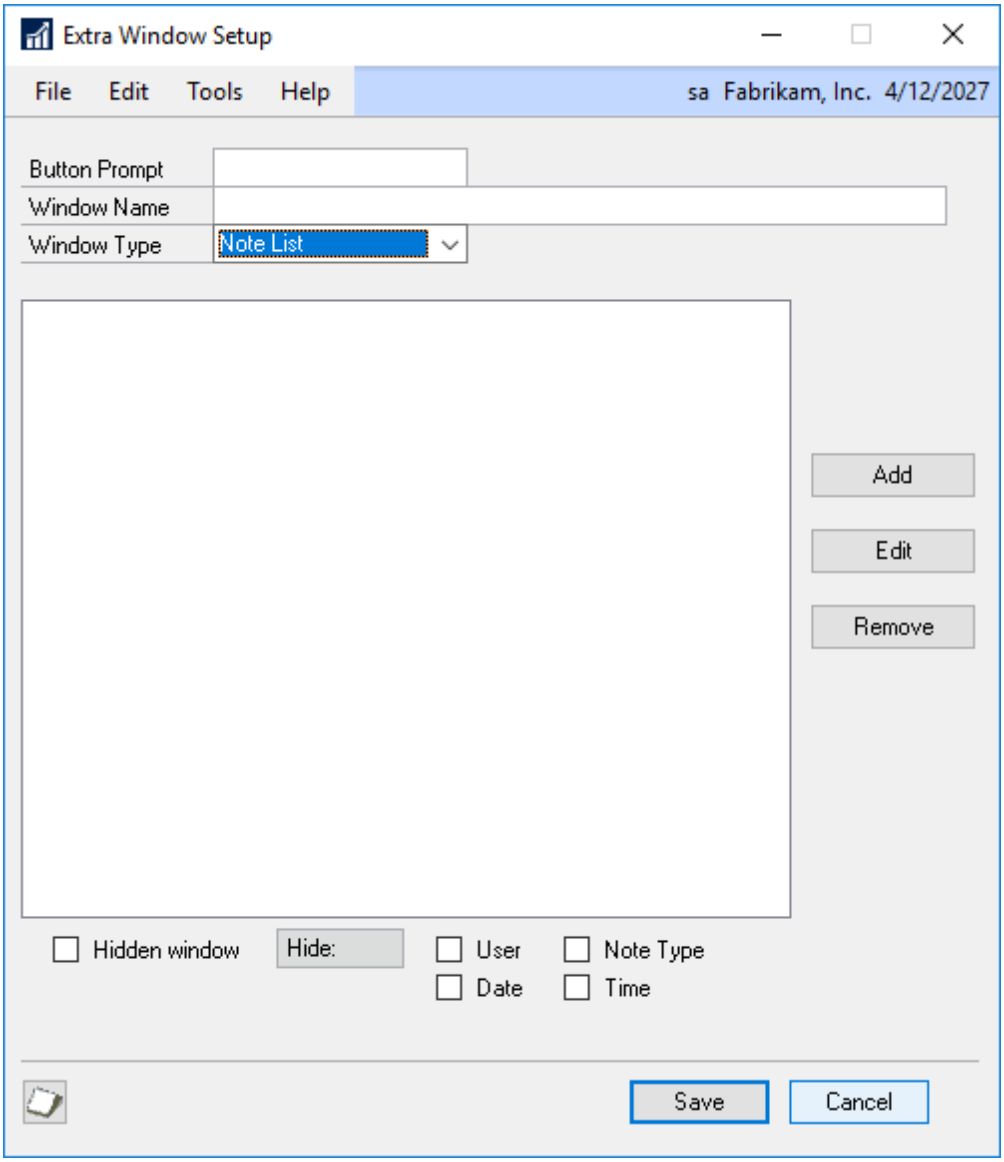
1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



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

To add a note list window:

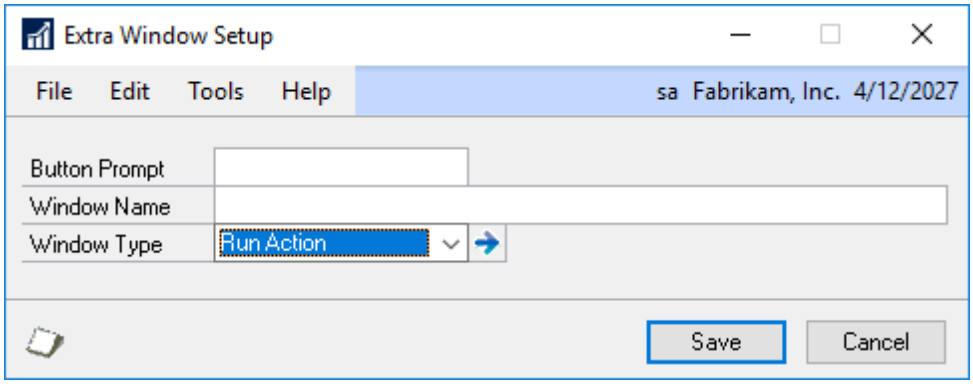
1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



3. Enter a Button Prompt and Window Name.
4. Select Note List as the Window Type.
5. Click Add to enter Note Types.
6. Click Save to save the Note Types.
7. Click Save.

To add an Run Action window (Enterprise Only):

1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



1. Enter a Button Prompt and Window Name.
2. Select Run Action as the Window Type.
3. Click the expansion arrow to add the action you would like the Extra Window to run.
4. Click Save.

Inquiries

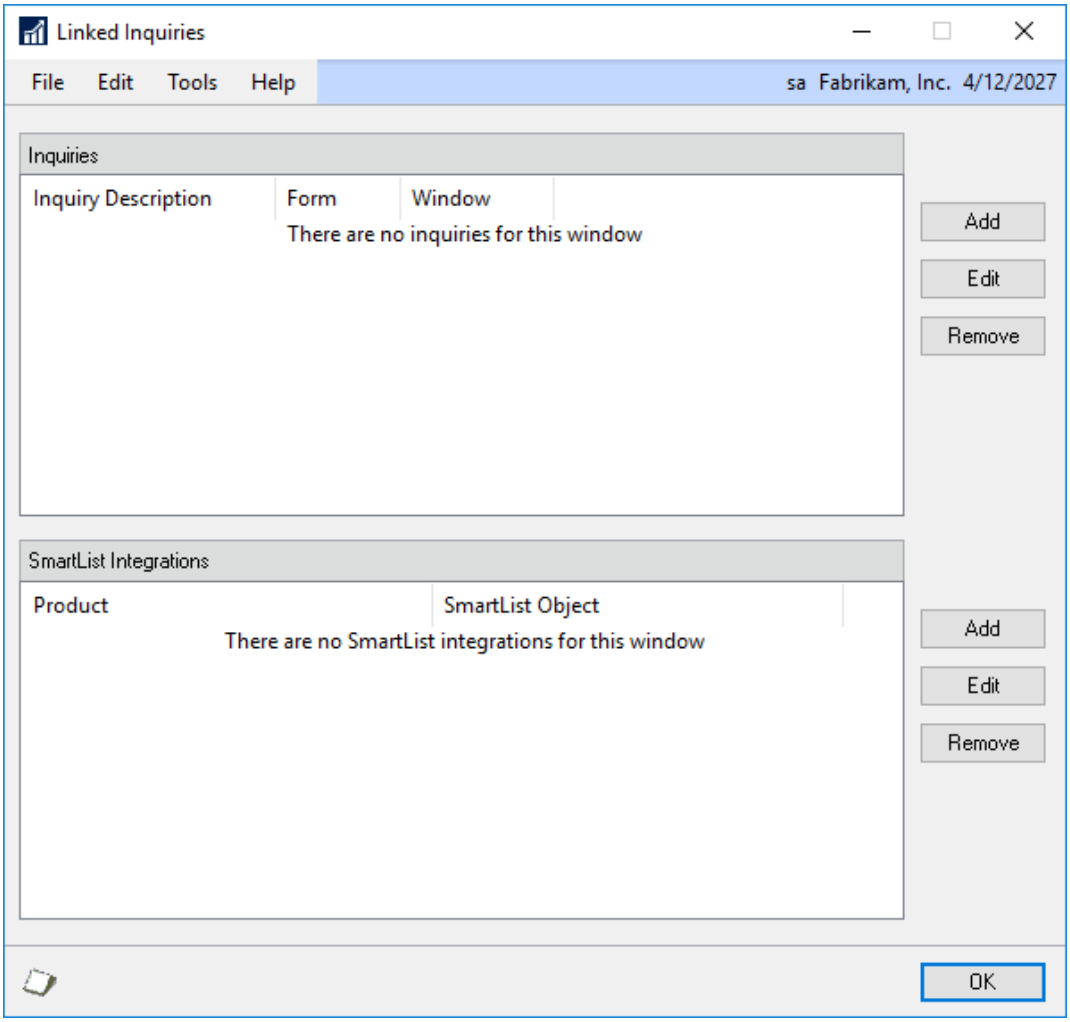
This module will guide you through the creation of an Extender Inquiry. An Extender Inquiry is used to display data entered on an Extender Field Entry Window from another Microsoft Dynamics GP form. You should use an Extender Inquiry when you have attached an Extender Window to a Microsoft Dynamics GP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

Adding a New Inquiry

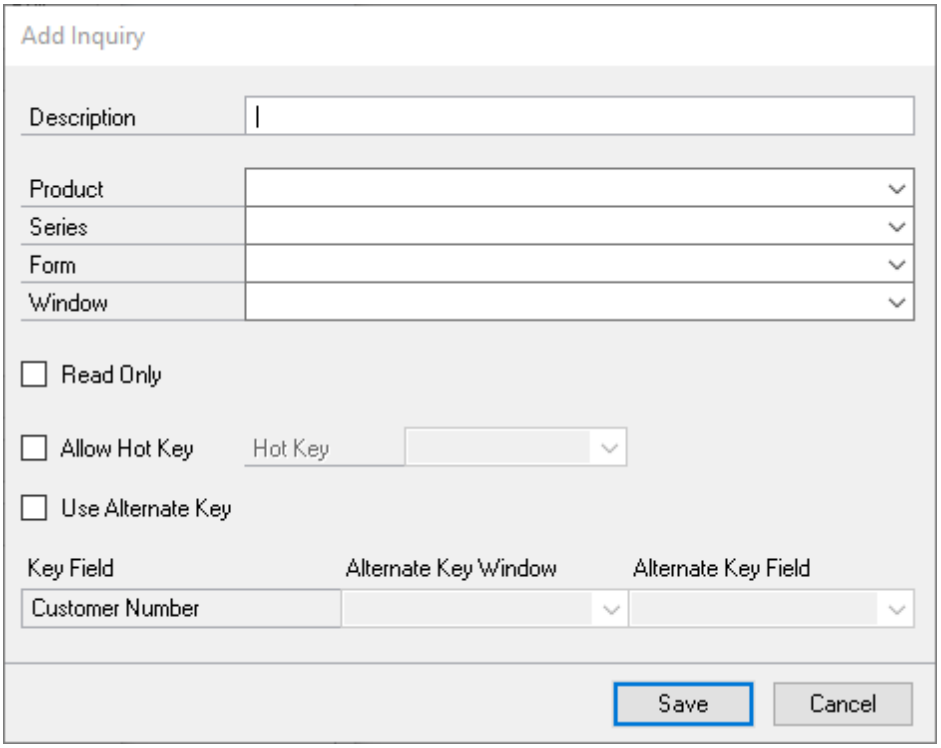
Use the Extender Inquiries window to define new Inquiries.

To add a new Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Window that you would to add the Inquiry to.
3. Click the Inquiry button to open the Linked Inquiries window.



4. Click Add next to the Inquiries list.



5. Enter a Description for the Inquiry. This will be the name you see on the Additional Menu of the form you add it to.
6. Select the Product, Series, Form and Window to link the Extender Inquiry to.
7. You can set the window to Read Only and put a Hot Key on it if you would like.
8. 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.

Modifying an Existing Inquiry

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

To modify an existing Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Window that you added the Inquiry too.
3. Click the Inquiry button.
4. Select the Inquiry that you wish to Modify and click the Edit button next to the Inquiries list.
5. Enter new information for the Inquiry.
6. Click Save and OK.

Removing Inquiries

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

To remove an Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Window you wish to remove the Inquiry from.
3. Click the Inquiry button.
4. Select the Inquiry that you want to remove from the Inquiries list.
5. Click the Remove button next to the Inquiries list.

SmartLists

This module will walk you through adding the fields from a Field Entry Window to SmartList.

Adding Window Fields to SmartList

Use the Linked Inquiries window to add your Extender Window fields into an existing SmartList. In addition to the SmartLists created with SmartList Builder, Extender Window fields can be added to the following Dynamics GP SmartLists.

- Accounts
- Customers
- Vendors
- Items
- Employees
- Sales Transactions
- Purchase Orders
- Receivables Transactions
- Payables Transactions
- Payroll Transactions
- Customer Addresses
- Vendor Addresses
- Prospects
- Customer Items
- Vendor Item

When an Extender Resource is added to one of the above SmartLists, the fields are added to the available columns list. The user will need to open the SmartList and select the Extender columns to display using the Columns button and, if desired, save the new view as a Favorite. The Extender fields will not be added to any of the current Favorites. It becomes available as a column to add to any favorite, however.

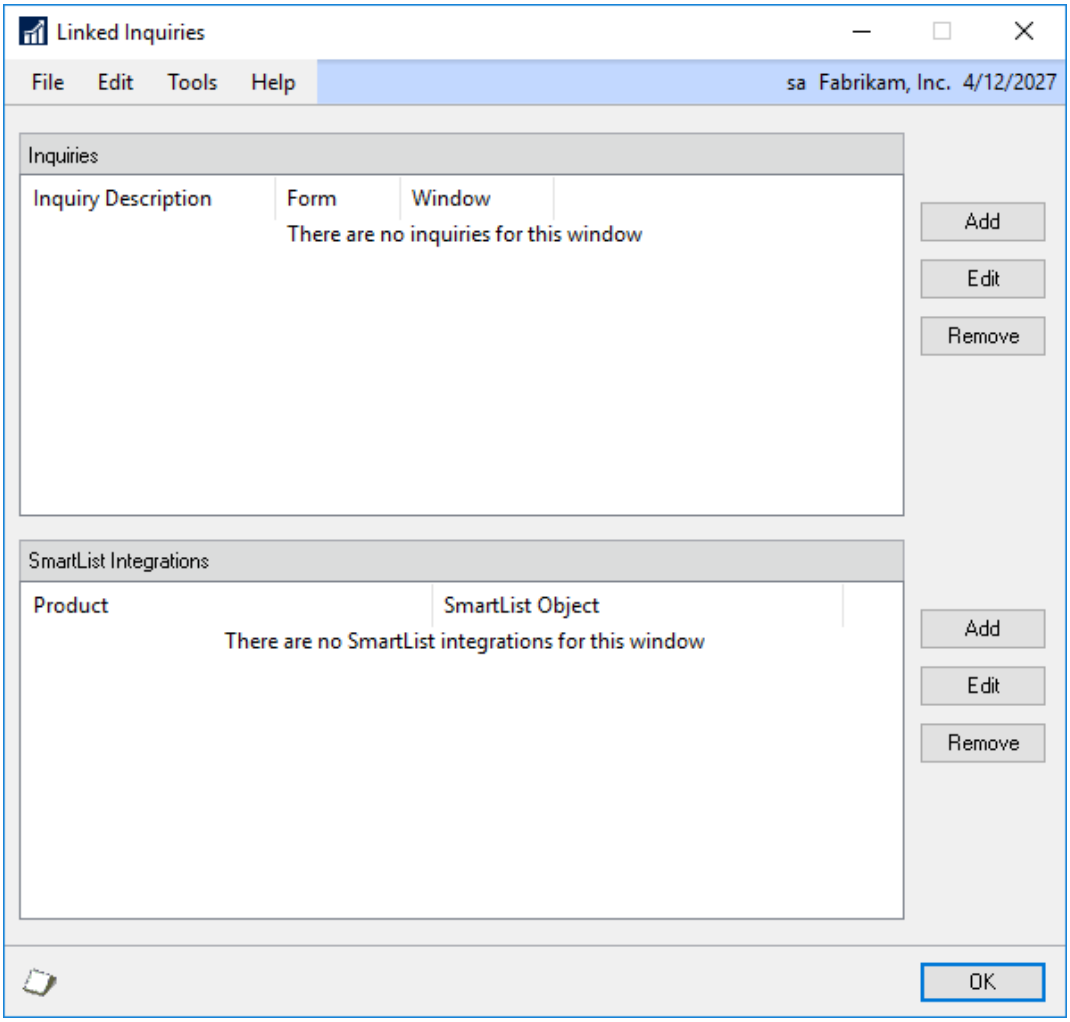
Although Extender windows are specific to a company, no fields are available to make SmartList specific to a company. Therefore, any Extender updates to a SmartList list affect the SmartList lists in all the companies. Therefore, conflicts in SmartList may occur when you create an Extender window in multiple companies. Extender fields from one or more of the other companies may not appear. The fields may also appear as Undefined in the SmartList list.

When you add fields to SmartList from Extender, consider the following guidelines:

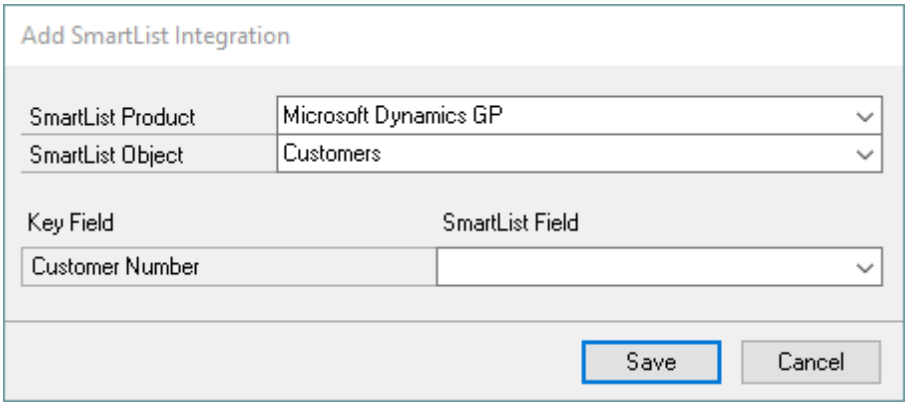
- If you add an Extender window to a SmartList list, the same Extender window must appear in all the companies. Any difference in the name of a field or of a data type in the Extender windows in the companies will cause conflicts in SmartList. Any difference in the name of the Extender window will also cause conflicts in SmartList. The easiest way to prevent these conflicts is to use the Extender export function to export the window. Then, use the import feature in another company. This guideline guarantees that the fields and the data types are identical in the Extender windows and in the SmartList lists.
- Select one company as the main company, and then do all your Extender development work in this main company. After you select a company as the main company, verify that SmartList lists are automatically updated by that company. To do this, click Tools, click Extender, and then click Options. In the main company, the Auto-update SmartLists check box is already selected. By default, all the Auto-update SmartLists check boxes are selected.
- For the other companies, click to clear the Auto-update SmartLists check box. When you click to clear the check box for the other companies, this action guarantees that only the main company updates the SmartList lists. Because SmartList lists are global, SmartList lists only have to be updated one time.
- After you set up the Extender window for the main company, export the window from the main company, and then import the window into the other companies.
- The information from the SmartList Integrations window will not appear when Extender imports the window. After Extender imports the window, open the Extender window in another company, and then click the SmartList button. Set up the SmartList Integrations window by using the same Key field and the same SmartList field that you used in the original Extender window. The original Extender window is the window that you set up for the main company.

To add Window fields to a SmartList:

1. Click the Inquiry button.
2. Click the Add button to the right of the SmartList Integrations list.



3. Select the SmartList Product and SmartList Object.



4. Match the Extender Window Key Field(s) to the SmartList field(s).
5. Click Save.



You can add a window to more than one SmartList.

To remove Window fields from a SmartList:

1. Click the Inquiry button.
2. Select the SmartList from the SmartList Integrations list.
3. Click the Remove button to the right of the SmartList Integrations list.
4. Click Delete to confirm the deletion when prompted.

Templates

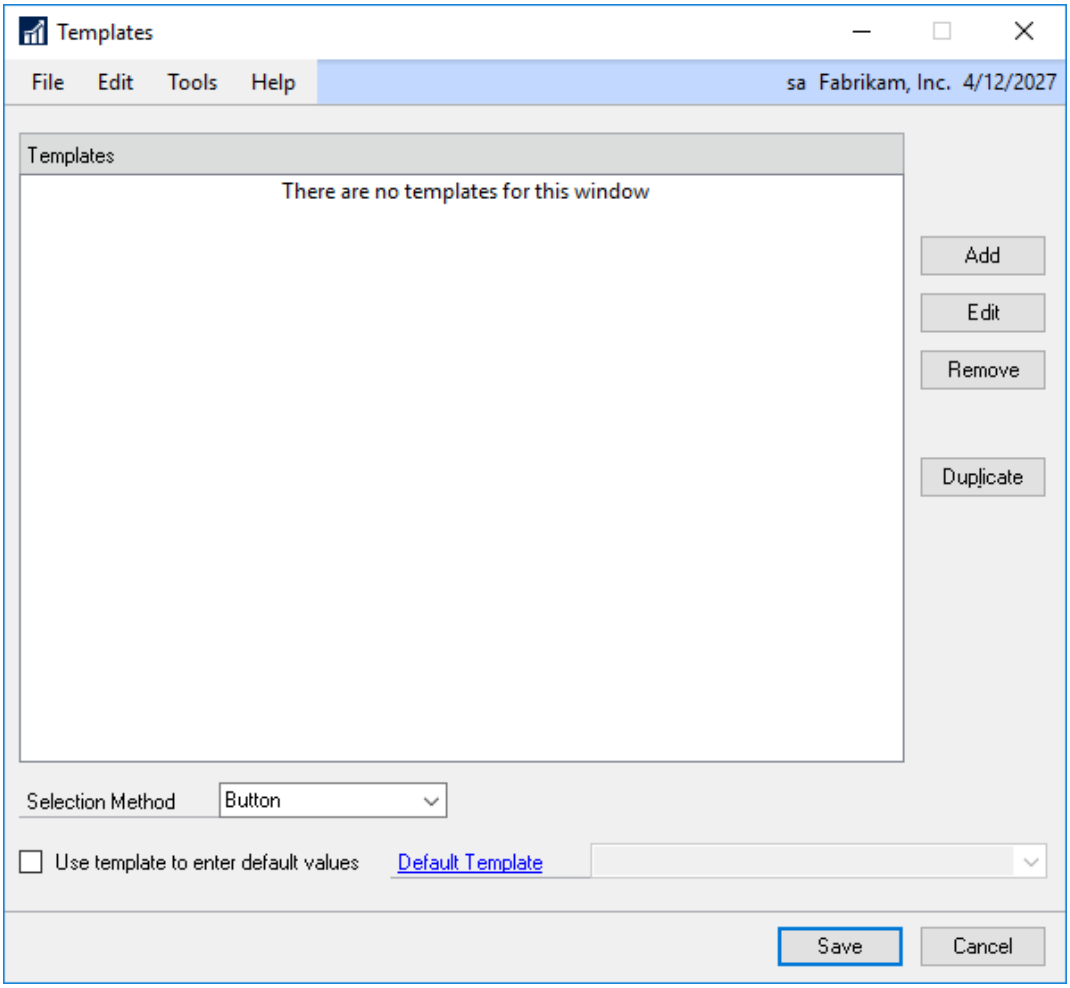
This module will walk you through adding Templates to a Field Entry Window. A Field Entry Window template is a set of default values for fields on the Window. They can be used to enter data more quickly by automatically assigning values.

Creating Window Templates

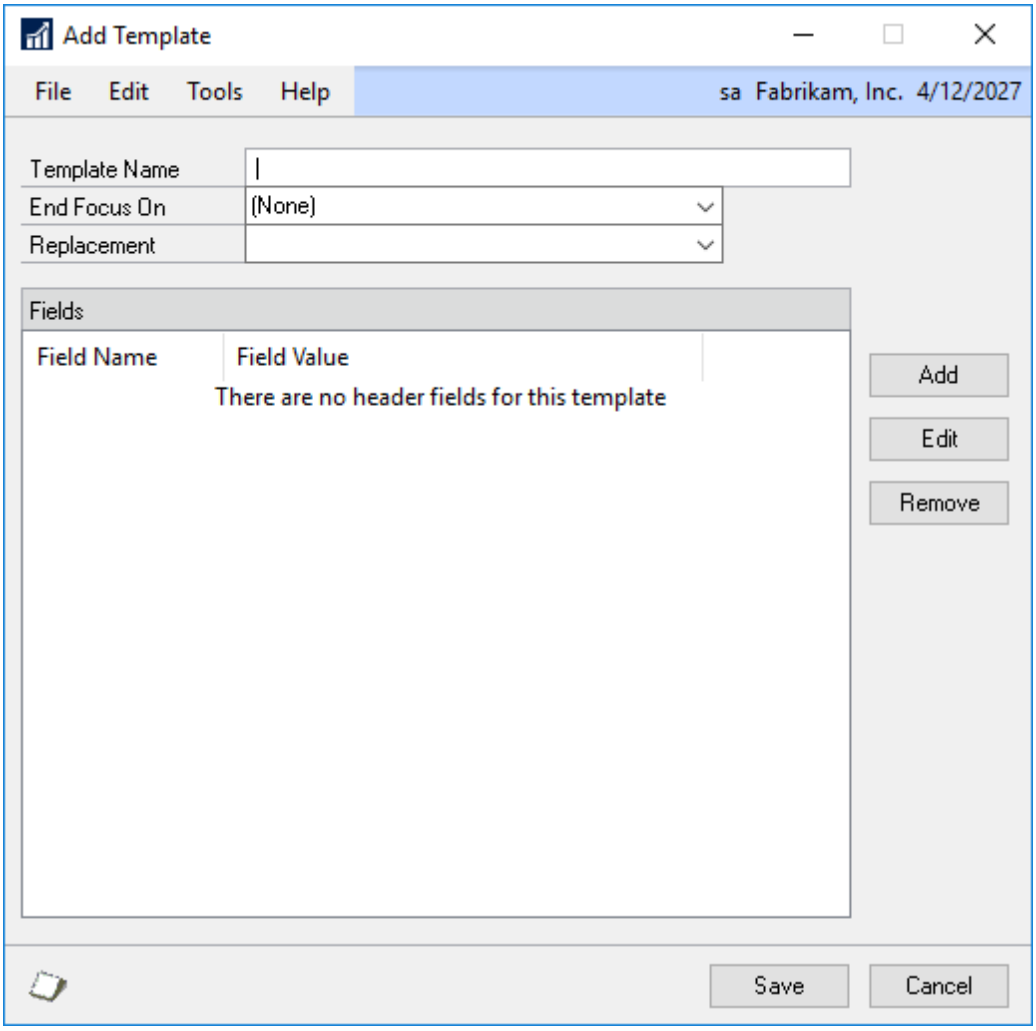
Use the Templates window to add new Window templates.

To create a new Window template:

1. Click Templates.



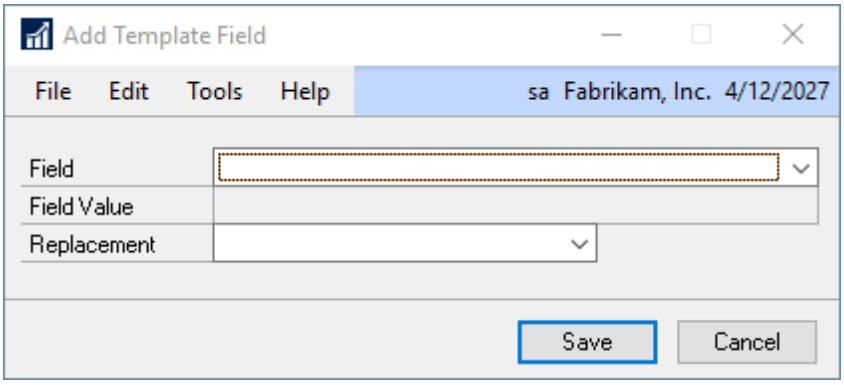
2. Click the Add button to the right of the Templates list.



3. Enter a name 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 the Add button to the right of the Fields list.



2. Select the field that you want to default.
3. Select the Field Value.
4. Select the Replacement option.



If you select to Always Replace then any existing values in these fields will be replaced by the template values. If you select to replace when empty, then only the fields without current values will be updated by the template.

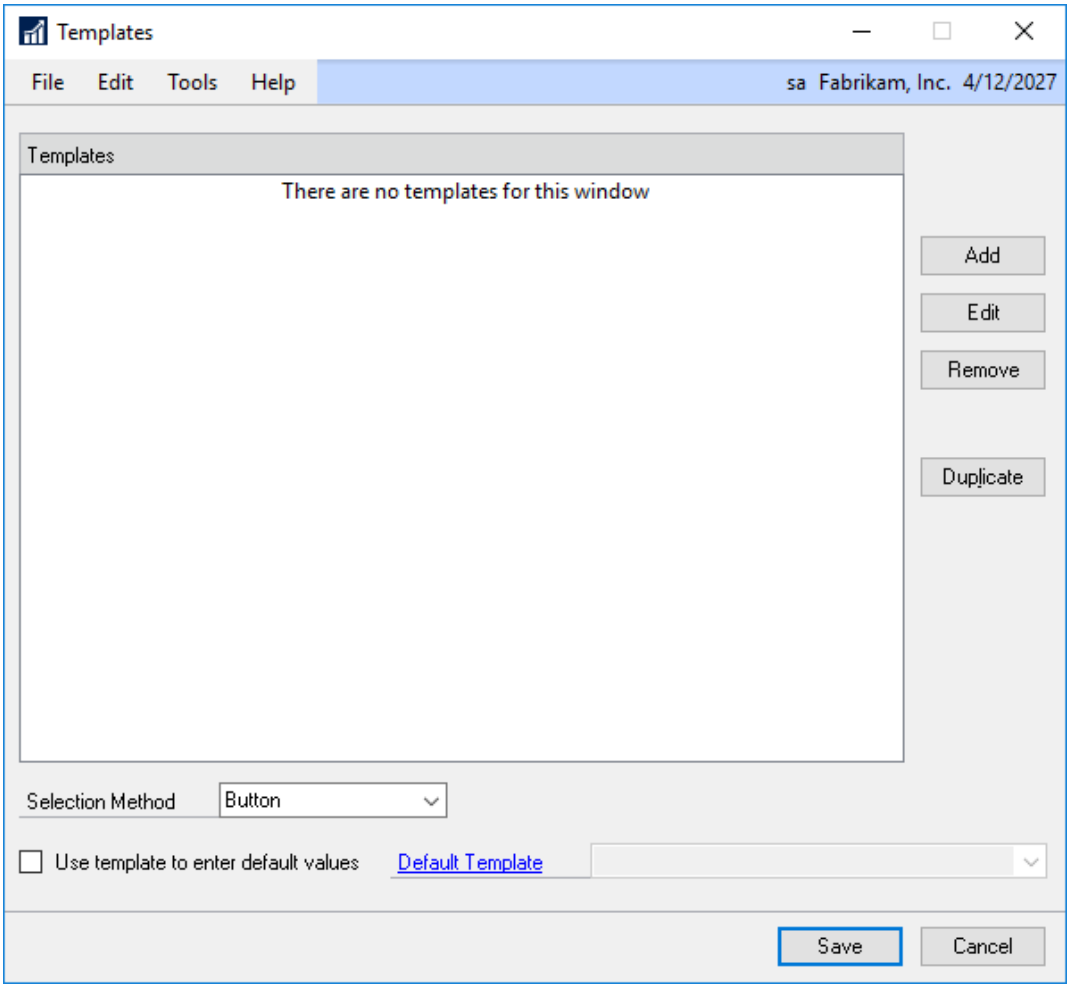
5. Click Save.

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 Templates.



2. Select the Selection Method.
3. Check the Use template to enter default values checkbox and enter the Default Template.
4. Click Save.

Using Window Templates

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

- If the Button selection method is chosen, there will be a template button on the bottom of the window if an Extender Window is being used. The button will be next to the ID on an Extender Form. The button looks similar to a folder icon with an * on it. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled on the top of the window. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will automatically open

prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the Extender Window.
2. Click Templates.
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 window.

Actions

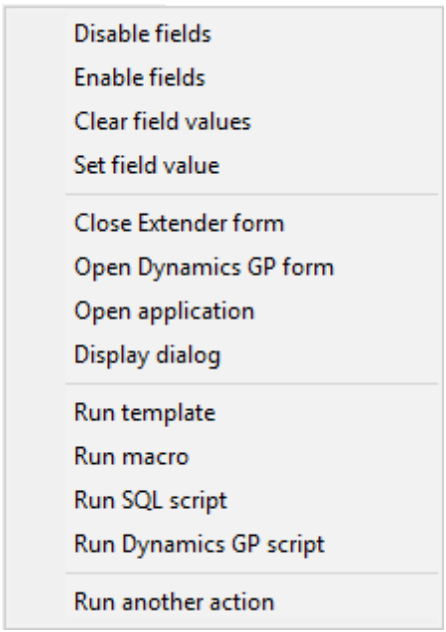
This module will walk you through adding Actions to a Field Entry Window.

Actions

Extender Actions allow a window to perform specific actions based on user input. There are fourteen actions that can be performed.



Extender Standard



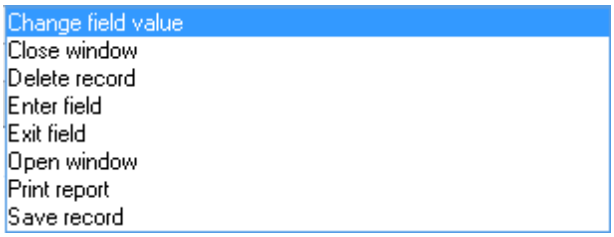
Extender Enterprise

- Disable Field: will disable the selected Extender field. This will allow data to be displayed, but not entered or changed
- Enable Fields: can be used to enable fields that were previously disabled using the Disable Field Action. When a field is enabled, the data in it can be added or changed
- Clear field values (Enterprise Only): can be used to clear the value entered in field
- Set field value (Enterprise Only): can be used to enter a specific value into a field
- Close Extender form (Enterprise Only): can be used to close an Extender form
- Open Dynamics GP form (Enterprise Only): can be used to open a Dynamics GP form
- Open application (Enterprise Only): will run an external application
- Display dialog (Enterprise Only): can be used to display an Extender Dialog
- Run Template: can be used to run a specific Window Template when the action is triggered. The templates need to be exist before they can be selected using an Action
- Run macro (Enterprise Only): will run a recorded Microsoft Dynamics GP macro
- Run SQL script (Enterprise Only): can be used to run a SQL script
- Run Dynamics GP script (Enterprise Only): can be used to run a Dexterity script
- Run another action (Enterprise Only): will call another Run Dynamics GP script action that is already setup

There are eight events in an Extender Window that Actions can be added to. 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 Actions window, all events for the Extender resource are displayed.

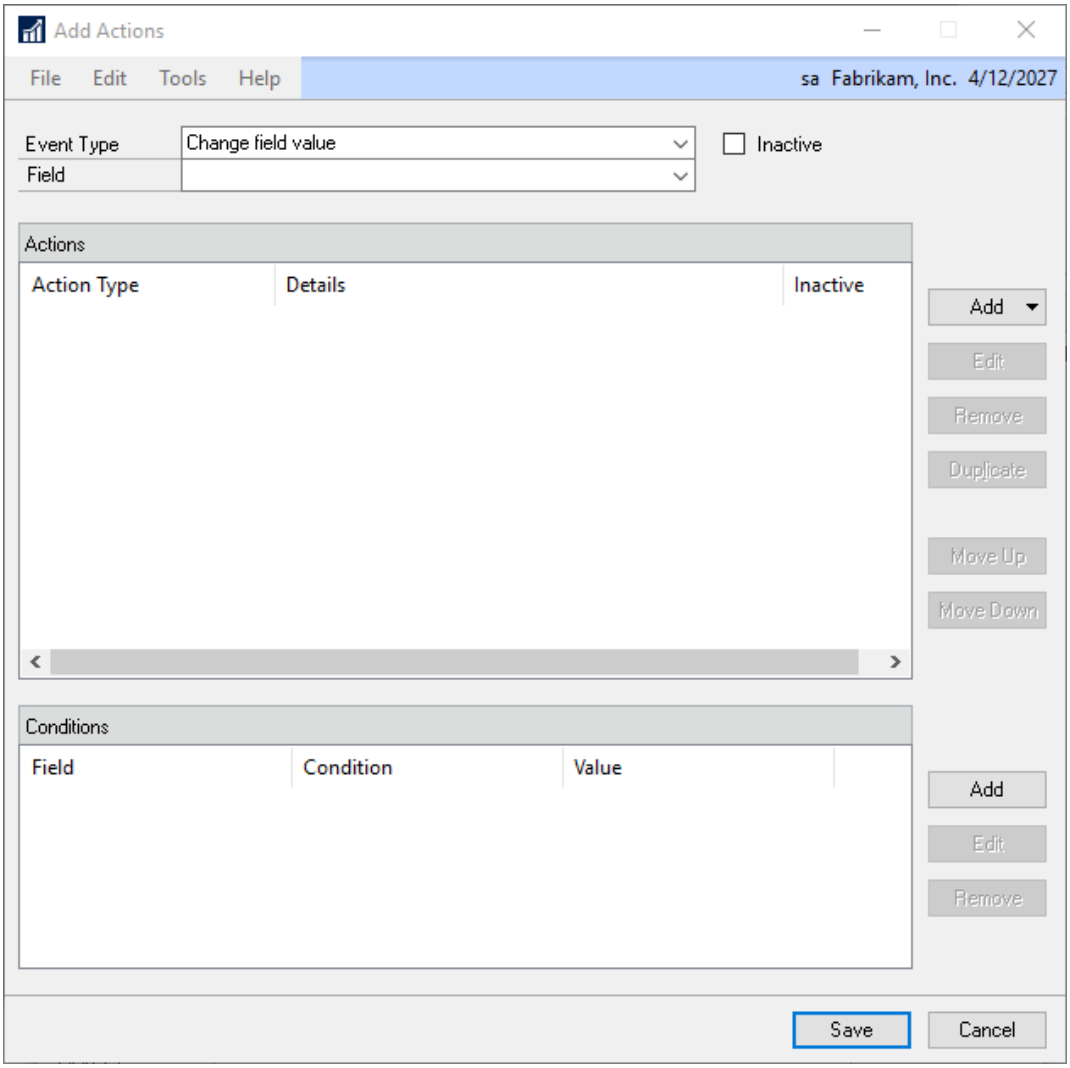
Conditions can also be added to conditionally perform any of the above actions.



- Change Field Value: triggers when the specified field has been changed in an Extender Window. The action runs after focus has been lost from the selected field.
- Close Window: triggers when the window is closed
- Delete Record: triggers when an existing record is deleted
- Enter Field: triggers whenever a specific field receives focus in an Extender Window.
- Exit Field: triggers whenever a specific field loses focus in an Extender Window.
- Open Window: triggers when the window is opened
- Print Report: triggers when the Print button is clicked or Print is selected from the File menu
- Save Record: triggers when a new record is created or an existing record is updated

To add an Extender Action to a Window:

1. Open the Extender Windows window and select the Window that you want to add an Action to.
2. Click on the Actions button to open the Extender Actions window
3. Click on the Add button to create a new Action



4. Select the Event Type from the Event Type drop down list.
5. Select the Field you want to trigger the event in the Field drop down list if available for the Event Type selected.
6. Click on the Add button in the Add Actions window.
7. Select your Action Type from the drop down list.

To modify an existing action type:

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

To duplicate an existing action type:

1. Select the action type that you want to duplicate from the Actions list.
2. Click on the Duplicate button next to the Actions list.

To inactivate an existing action type:

1. Select the action type that you want to inactivate from the Actions list.
2. If you want to inactivate the action as a whole, mark the Inactive checkbox at the top of the Extender Actions window.
3. If you want to inactivate a specific action in the main action, highlight the specific action and then click the Edit button. Mark the inactive icon and save the action.
4. Save the main action.

If you no longer want an action type on an action, it can be removed.

To remove an existing action type:

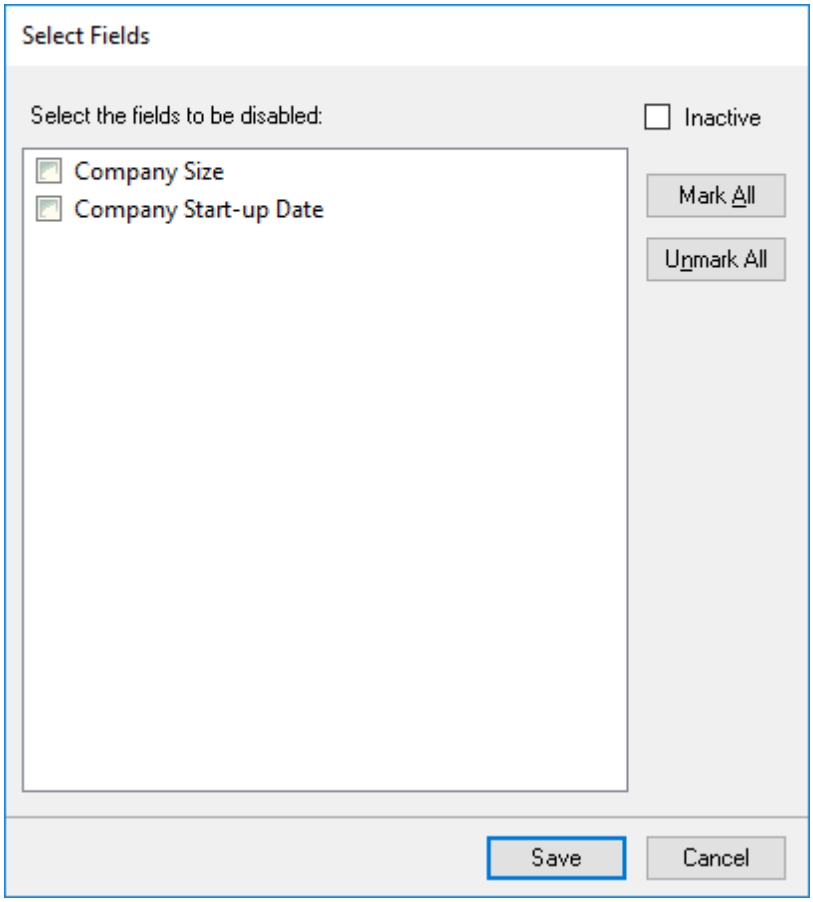
1. Select the action type that you want to remove from the Actions list.
2. Click on the Remove button next to the Actions list.

Disable Fields

A Disable Fields action type disables a number of fields on the Extender resource.

To add a Disable Fields action type:

1. Select the event from the Events list that you want to add a Disable Fields action type to
2. Click on the Add button next to the Actions list and select Disable Fields from the drop-down list



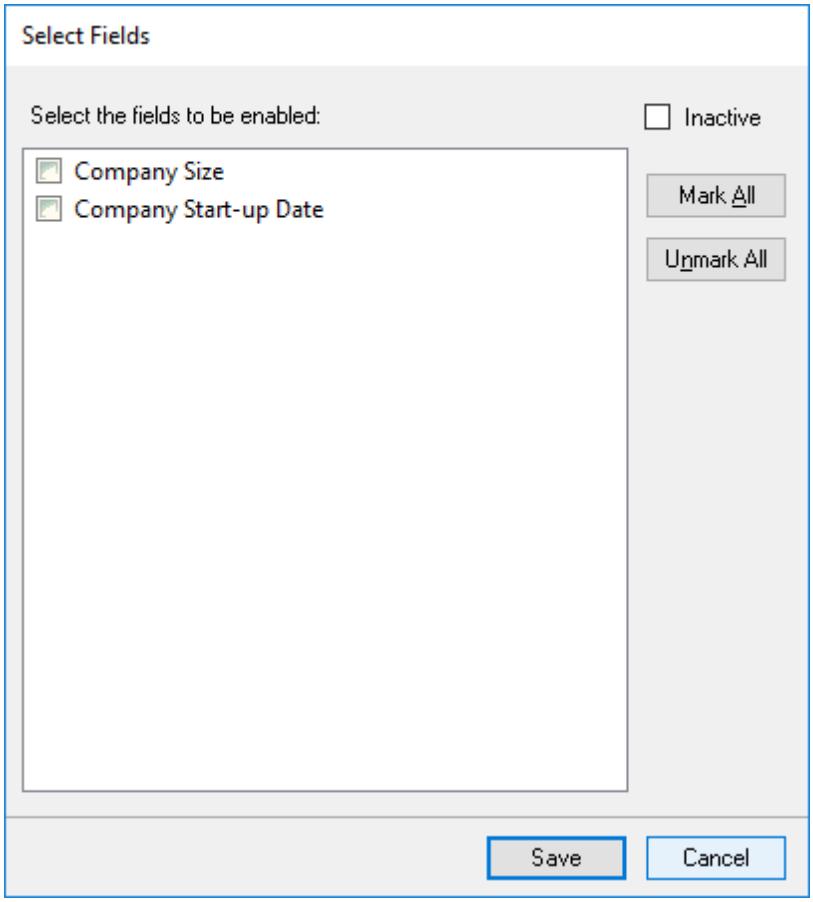
3. Mark the fields that you want to disable.
4. Click on the Save button.

Enable Fields

An Enable Fields action type enables a number of fields on the Extender resource.

To add an Enable Fields action type:

1. Select the event from the Events list that you want to add an Enable Fields action type to
2. Click on the Add button next to the Actions list and select Enable Fields from the drop-down list



3. Mark the fields that you want to enable.
4. Click on the Save button.

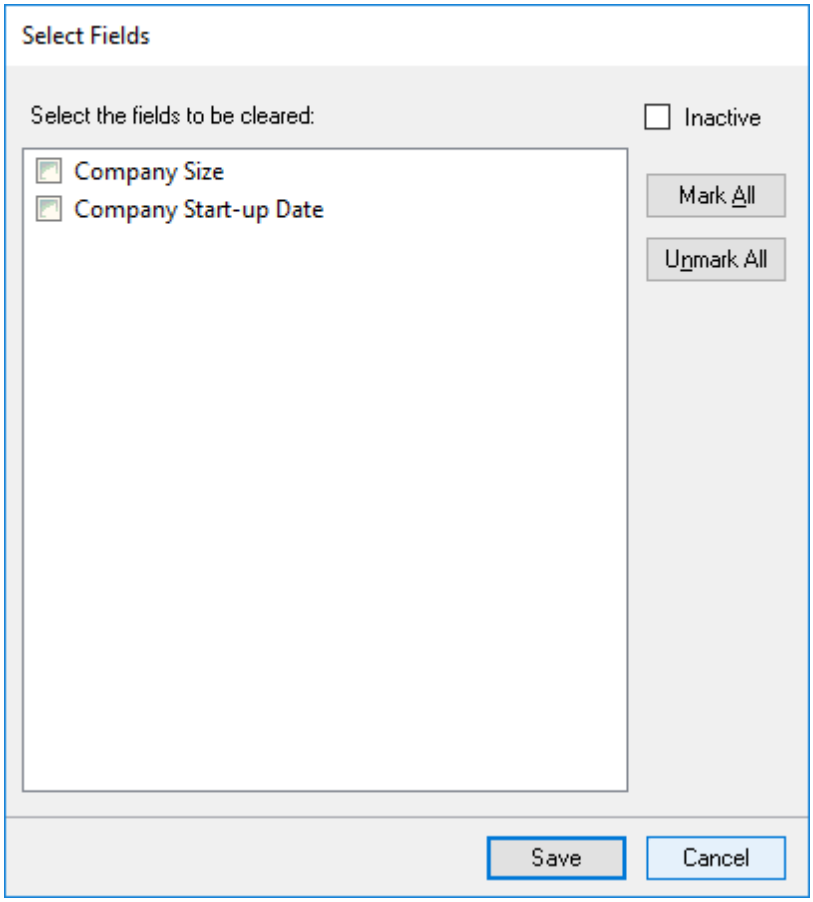
Clear Field Values (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Clear Values action type clears a number of fields on the Extender resource.

To add a Clear Values action type:

1. Select the event from the Events list that you want to add a Clear Values action type to
2. Click on the Add button next to the Actions list and select Clear Values from the drop-down list



3. Mark the fields that you want to clear.
4. Click on the Save button.

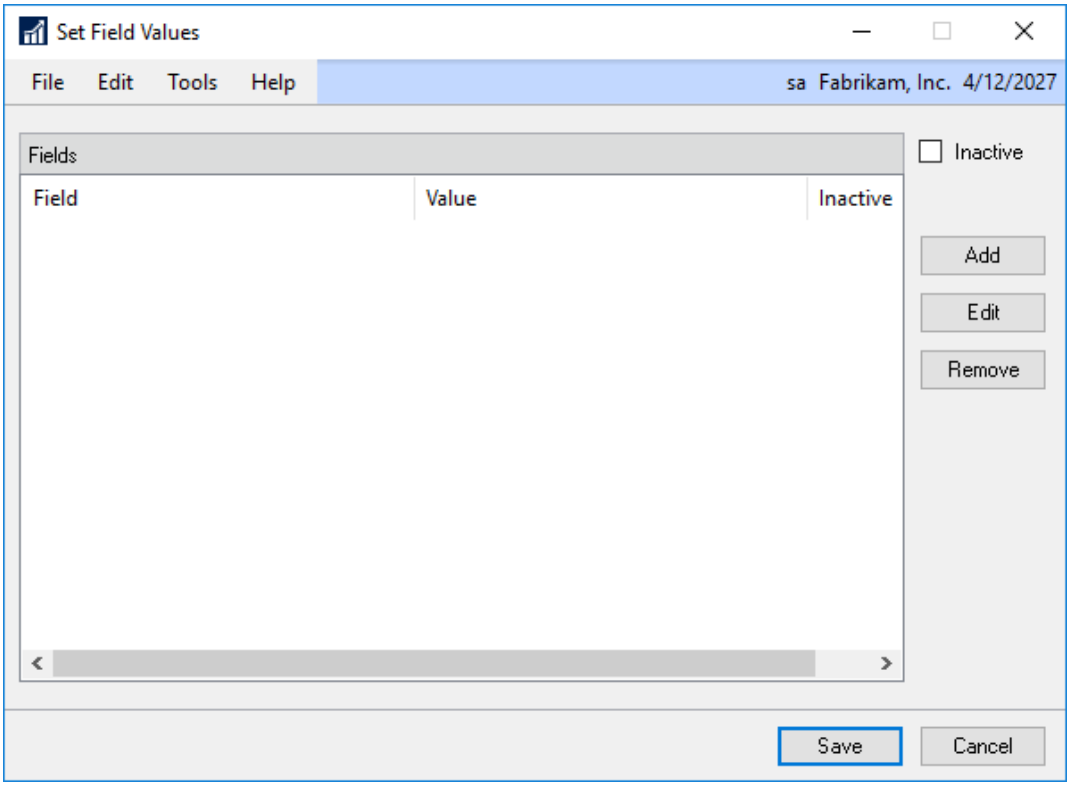
Set Field Values (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

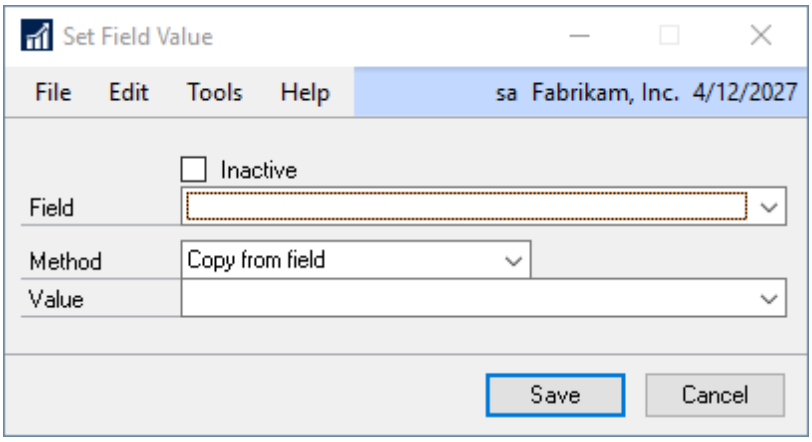
A Set Value action type sets the value of a single field on the Extender resource. You can always set the value or only set the value when the field is empty.

To add a Set Value action type:

1. Select the event from the Events list that you want to add a Set Value action type to
2. Click on the Add button next to the Actions list and select Set Field Value from the drop-down list



3. Select Add to add a field to set the value for.



4. Select the field that you want to set the value of.
5. Select the method to use to set the value.
6. Enter the value that you want to set the field to.
7. Click on the Save button.

Close Extender Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Close Extender Form action type closes the current Extender Window.

To add a Close Extender Form action type:

1. Select the event from the Events list that you want to add a Close Extender Form action type to
2. Click on the Add button next to the Actions list and select Close Extender Form from the drop-down list. It will automatically create the action.

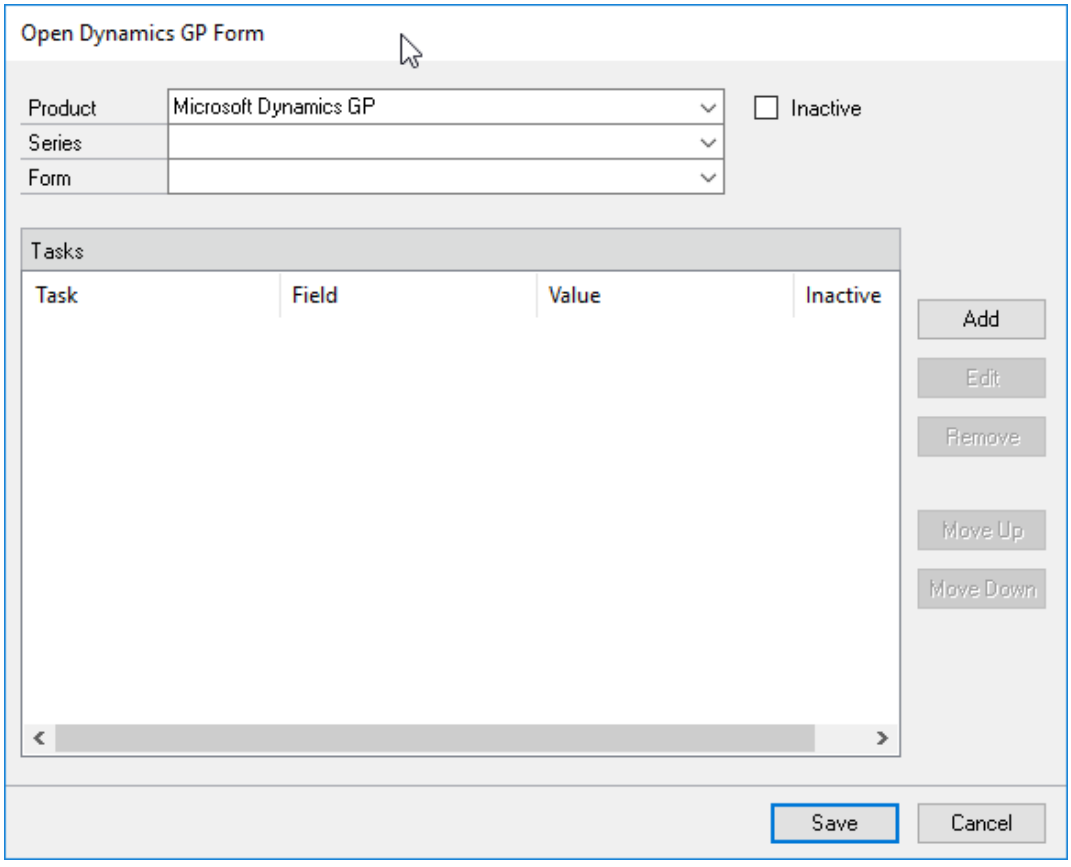
Open Dynamics GP Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

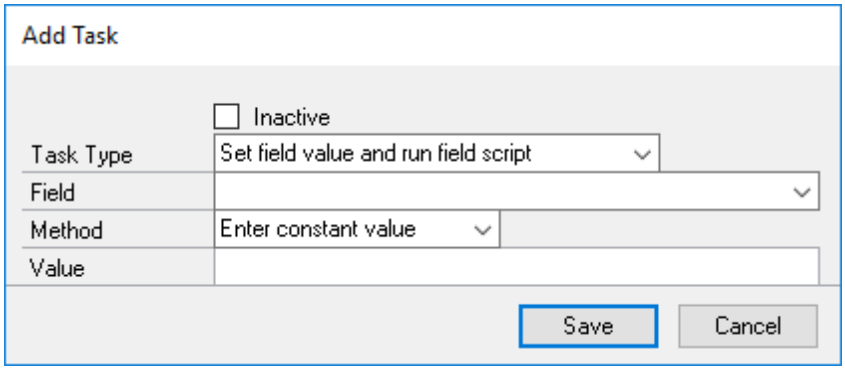
An Open Dynamics GP Form action type opens a Dynamics GP Window when run. You can open the window for a new record or pass data to the window.

To add an Open Dynamics GP Form action type:

1. Select the event from the Events list that you want to add a Set Value action type to
2. Click on the Add button next to the Actions list and select Open Dynamics GP Form from the drop-down list



3. Select the Product, Series, and Form for the Dynamics GP form to be opened.
4. To add a task to pass data to the window, click Add.



5. Select the Task type to use to pass the data to the window
6. Select the Field to pass data to, the Method to populate it, and the value to use.
7. Click on the Save button.
8. If additional Tasks need to be added, repeat steps 4-7.
9. Click Save.

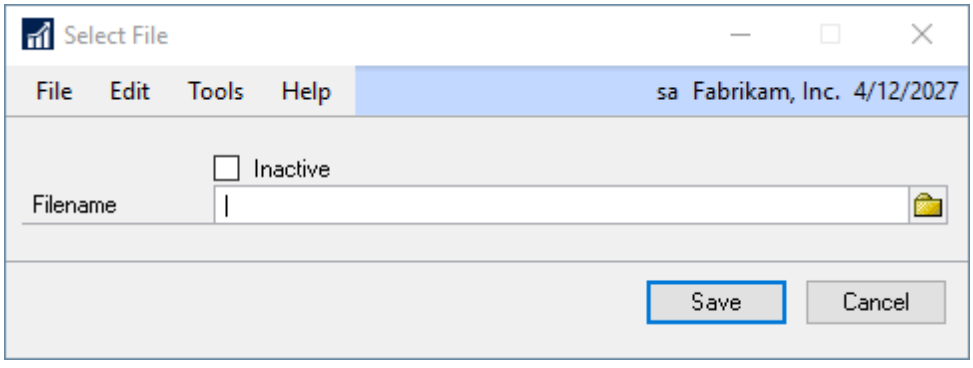
Open Application (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add an Open Application action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Open Application from the drop-down list



3. Enter the filename of the application that you want to run.
4. Click on the Save button.

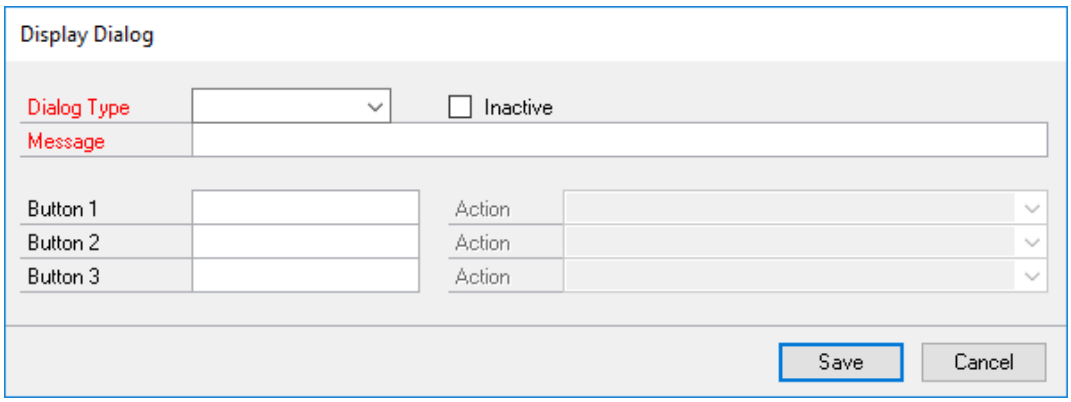
Display Dialog (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Display Dialog action type presents the end user with a message window. The window can display a message, ask a question, or request input.

To add a Display Dialog action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Display Dialog from the drop-down list



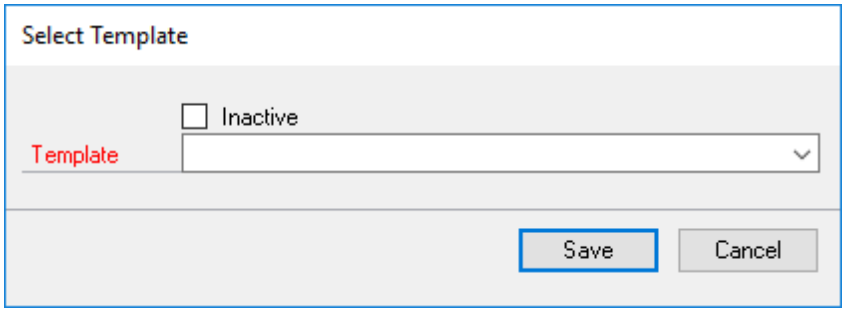
3. Select the Dialog Type.
4. If the Dialog Type is Ask, enter a question and values for the answer buttons. Actions can also be added for each button.
5. If the Dialog Type is Input, enter a question.
6. If the Dialog Type is Message, enter a Message to display.
7. Click on the Save button.

Run Template

A Run Template action type applies a template from the Extender resource. This action type is only displayed if there are Extender resources added to the Extender resource.

To add a Run Template action type:

1. Select the event from the Events list that you want to add an Apply Templates action type to
2. Click on the Add button next to the Actions list and select Run Template from the drop-down list



3. Select the Template that you want to apply.
4. Click on the Save button.

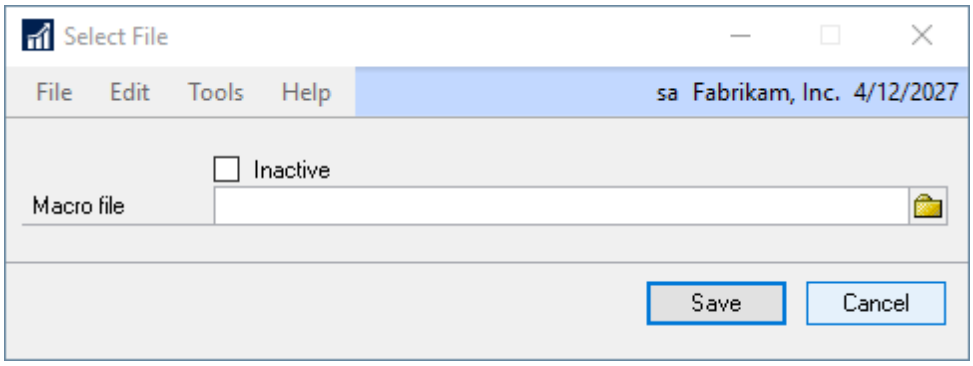
Run Macro (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Run Macro action type runs a Microsoft Dynamics GP macro.

To add a Run Macro action type:

1. Select the event from the Events list that you want to add a Run Macro task to
2. Click on the Add button next to the Actions list and select Run Macro from the drop-down list



3. Enter the filename of the macro that you want to run.
4. Click on the Save button.

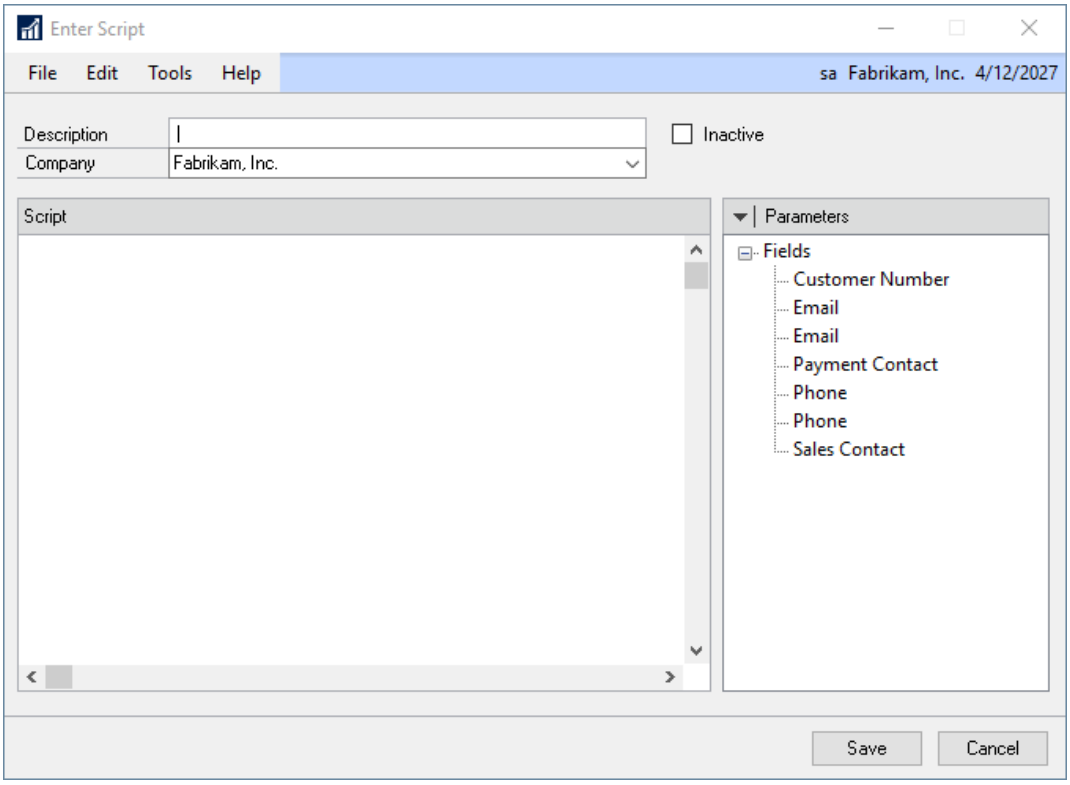
Run SQL Script (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add a Run SQL Script action type:

1. Select the event from the Events list that you want to add a Run SQL task to
2. Click on the Add button next to the Actions list and select Run SQL Script from the drop-down list



3. Enter a Description for the action type.
4. Select the Company that you want run the SQL script in. This can be a Microsoft Dynamics GP company or the system database.
5. Enter the SQL script that you want to run. Parameters and Tables can be selected from the list on the right.
6. Click on the Save button.

Run Dynamics GP Script (Enterprise Only)

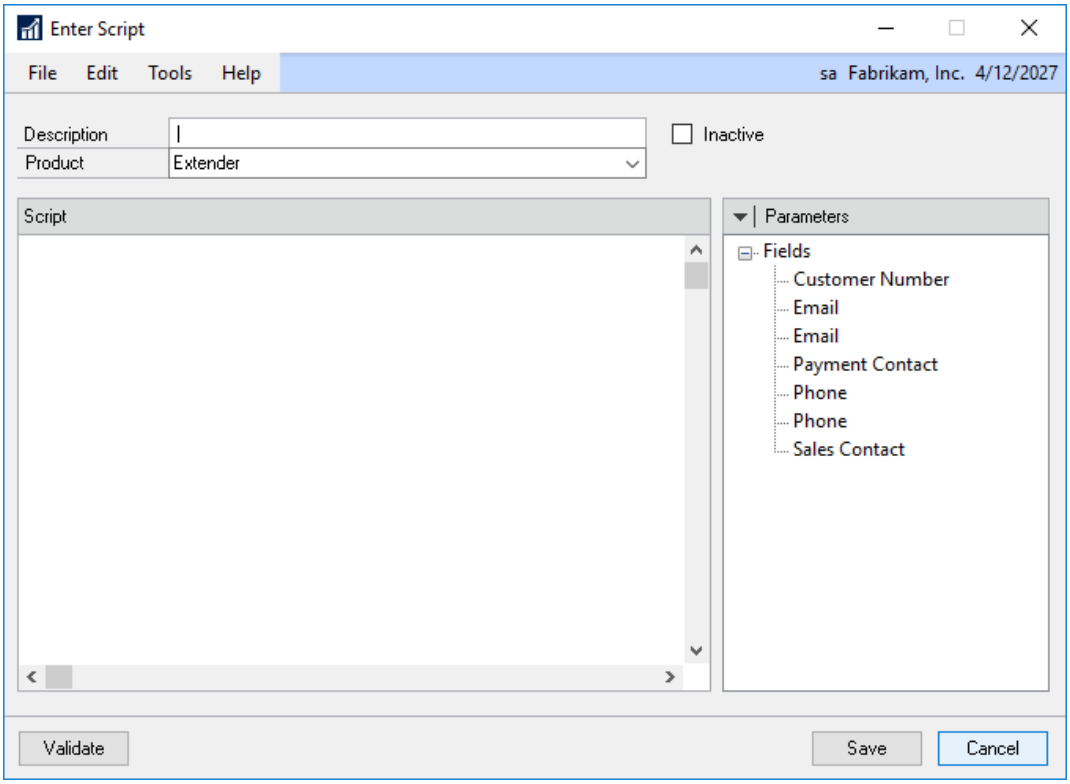
*** This feature is only available in Extender Enterprise. ***

An Execute Script action type 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 action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Run Dynamics GP Script

from the drop-down list



3. Enter a Description for the action type.
4. Select the product that you want to execute the script in.
5. Enter the script that you want to execute. Parameters, Forms, Tables, Sanscript Commands, and Function Library Commands
6. Click on the Save button.

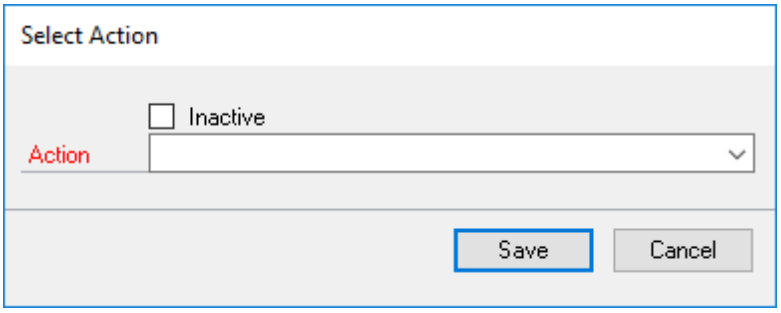
Run Another Action (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

The Run another action type allows you to execute another Run Dynamics GP script action.

To add Run another Action action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Run Dynamics GP Script from

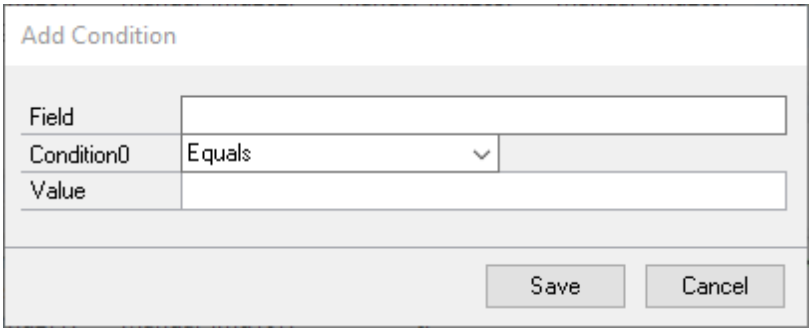


Conditions

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

To add a condition:

1. Select the action from the actions type list to add a condition to
2. Click on the Add button next to the Conditions List



3. Select the field to base the condition on.
4. Select the condition type.
5. Enter the value of the field.
6. 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 button next to 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 an existing condition:

1. Select the action type from the Actions list that the condition is on.
2. Select the condition that you want to remove from the Conditions list.

3. Click on the Remove button next to the Conditions list.

Note List Window

This section will guide you through the creation of an Extender Note List. 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. For example, you could use an Extender Note to record correspondence details against a customer or vendor. Note types can be setup to allow for grouping of the notes based on the topic of the note. 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.

Basic Setup

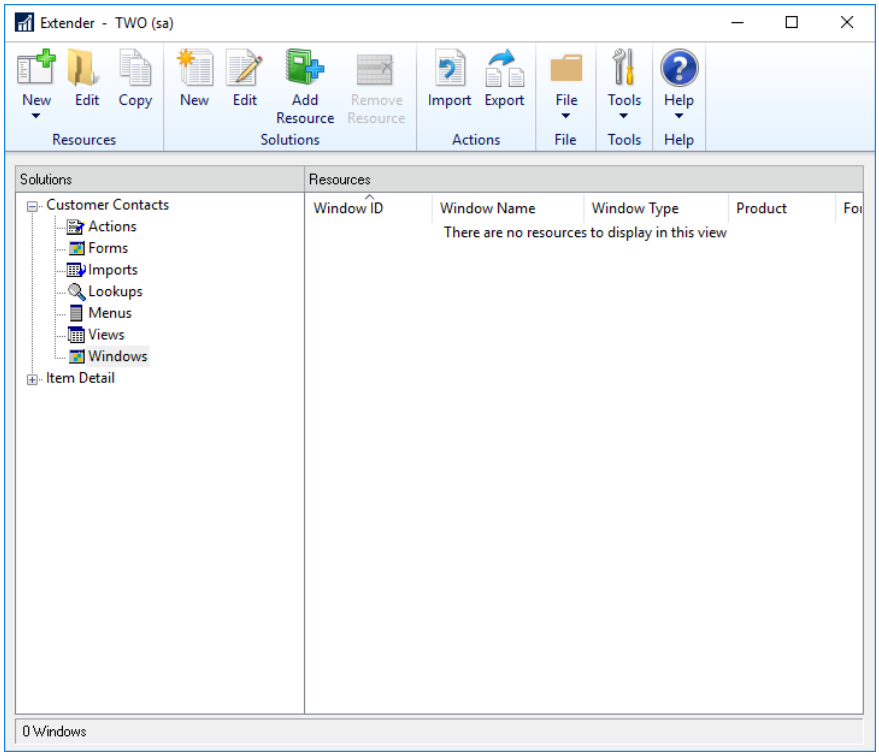
This module will walk you through the basic setup of a Note List Window.

Adding a New Note Window

Use the Extender Windows window to define new Notes Windows.

To add a new Window:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Create a new window.
    a. Option 1:
        i. Expand the Solution that the window is to be added too.
        ii. Select Windows from within the solution.
        iii. Click New.

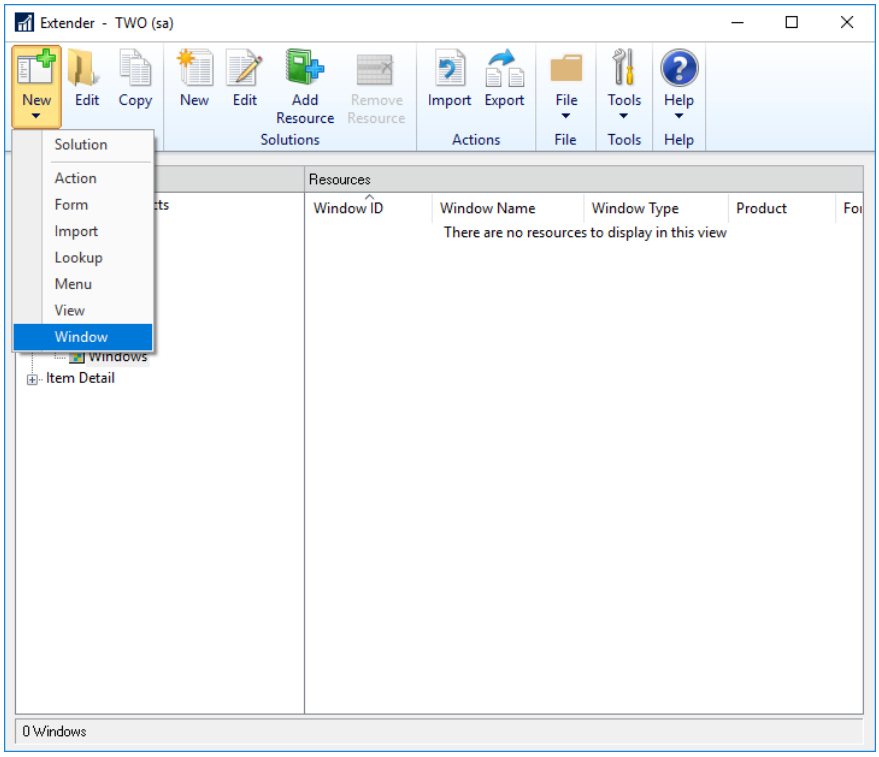


b. Option 2:

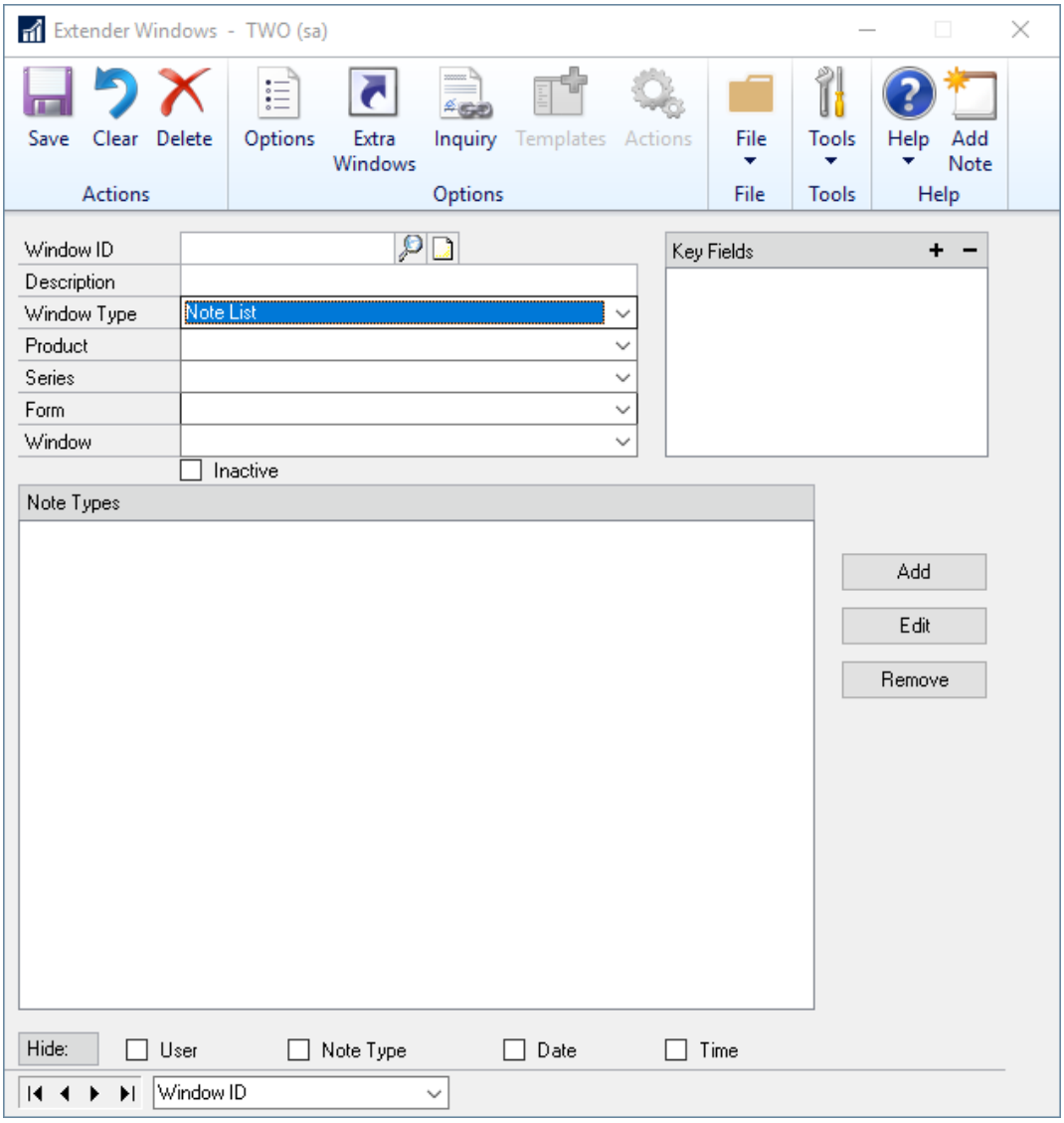
i. Select the Solution that the window is to be added too.

ii. Click the drop down arrow next to the New button.

iii. Select Window.



3. Enter an ID for the Window. This ID will only be referenced in Extender and needs to be Unique.



4. Enter a Description for the Note Window. The Description is what will be shown on the menus when you access the Note Window as well as on the title of the window.
5. Select the Window Type of Note List for a note window.
6. Select the Product the note window you are linking the Extender Window to is from. If you have additional or third party products installed with Microsoft Dynamics GP, make sure you know which product the window you are trying to link to comes from. Many times, the additional products can “replace” the standard Microsoft Dynamics GP window and you would need to pick that products window instead of Microsoft Dynamics GP.

7. Select the Series the note window you are going to link to is in. Generally this will be the same as the Series that you would select from the menus to access the window.
8. Select the Form that the note window you are going to link to belongs to. Many times, this is going to be the name of the window you are actually linking to, but if you have to open a window to get to the window you want to link to, then the Form would be the first window you have to open.
9. Select the Window to link the note window to. This will generally be the same as the Form you selected, but if you are opening a window to then open the window you want to link to, the Form would be the first window and the window would be the window you actually want to link to.
10. Add the appropriate key fields. See the next topic on Key Fields for more information on which fields you would want to use.
11. Click Add to add the Note Types you want available for the Note. Note Types allow you to group notes based on the topic. If you don't want any Note Types to be available, it is not required to enter them.
12. By default, the Note List Window will include the User, Note Type, Date, and Time fields along with the note. If you want to hide any of them mark the checkbox next to the Hide option for that field.
13. Click Save.



You can add more than one window to a single Microsoft Dynamics GP form. Dexterity will only show the first few windows on the Additional menu list though.

Key Fields

Key fields are used to assign a unique identifier from a Microsoft Dynamics GP window to an Extender record. This is generally the required fields for the window. For example, the Key Field on the Customer Maintenance form is the Customer Number. There may be more than one key field required to create a unique identifier. For example, the Key Fields on the Customer Address Maintenance form would be the Customer Number and Address ID.

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.

When selecting the key fields the best thing to keep in mind is that this needs to be a unique identifier for the records and not something that might change. For example, using a Description or Name might not be a good key as that may change for a record. If you use a

field that changes as the key field, when that record changes, the Extender data will no longer be linked. Likewise, if you have setup the window and entered data into the window and then change the key fields, the existing data will no longer be accessible through the window as the key it is looking for will not match any of the data.

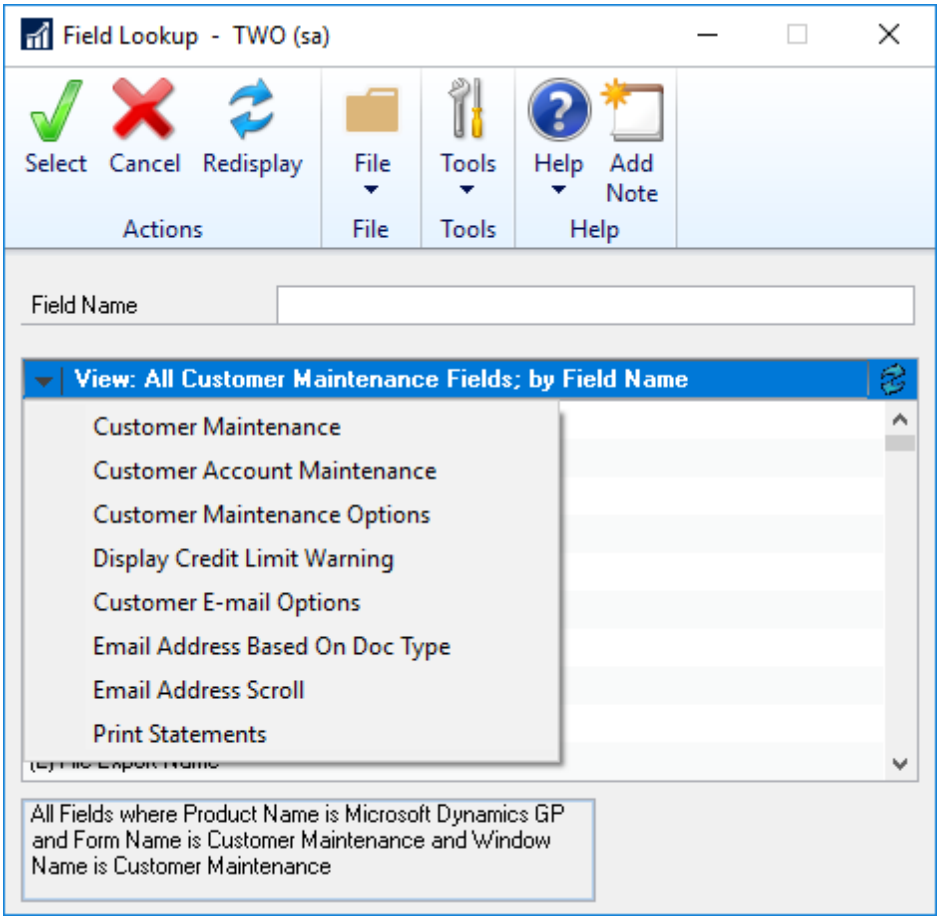
There are many forms that the Key Fields will default in automatically for you. It will set them to the default keys for that particular form. You can always edit these key fields if needed.

To add a key field:

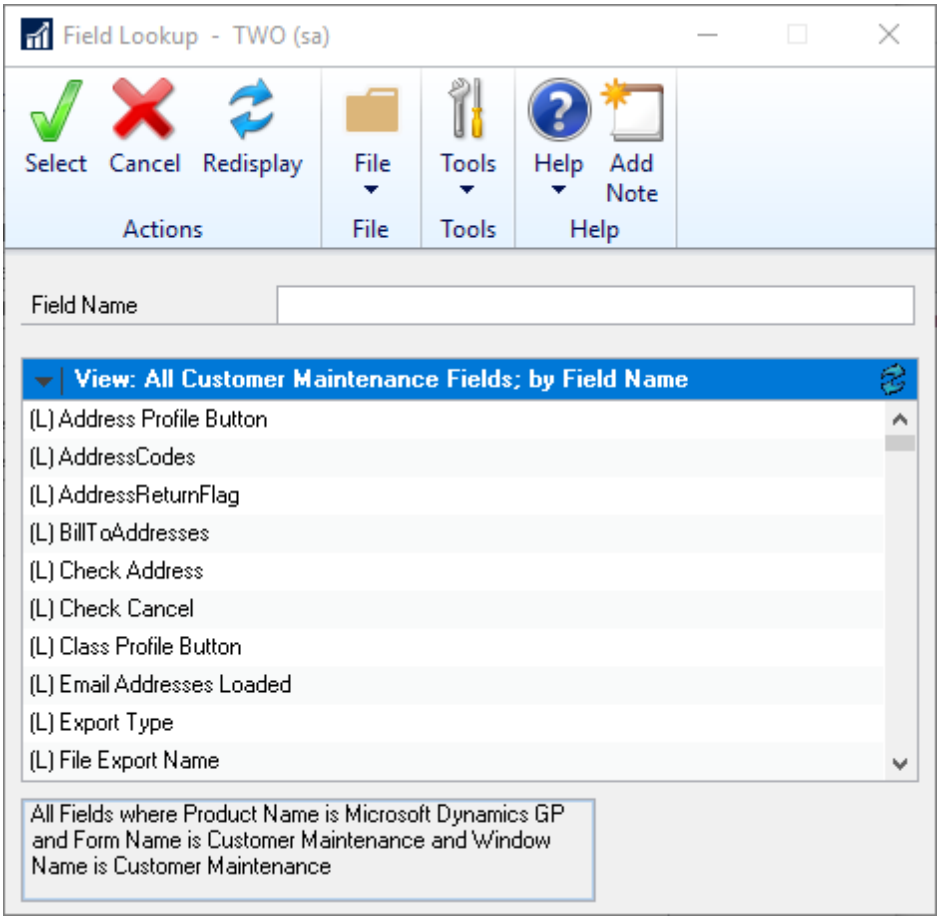
1. Click the Add button above the Key Fields list to open the Field Lookup window.



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 Select to add the selected field to the key fields for the Extender Window.

Using Notes Windows

A note window can be immediately accessed as soon as it has been saved.

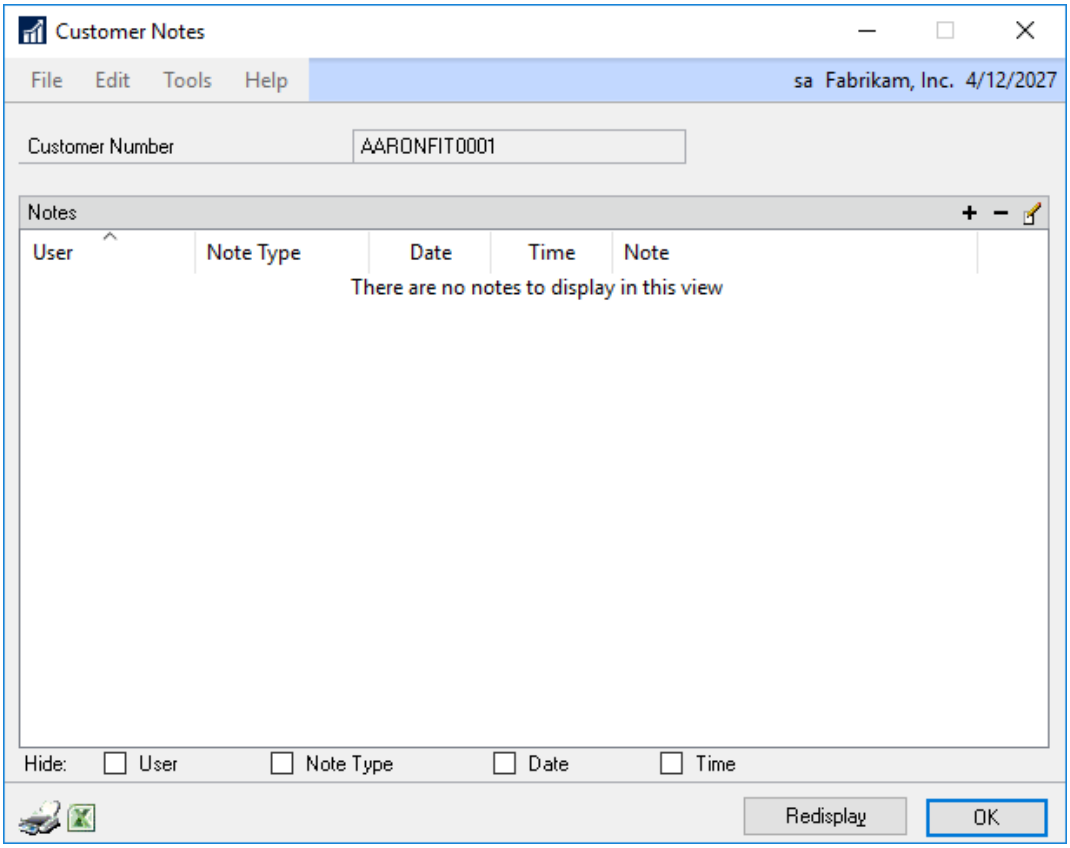
To open a Notes window:

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, or the field is not available, you will receive the error message “Not all required fields have been entered.”

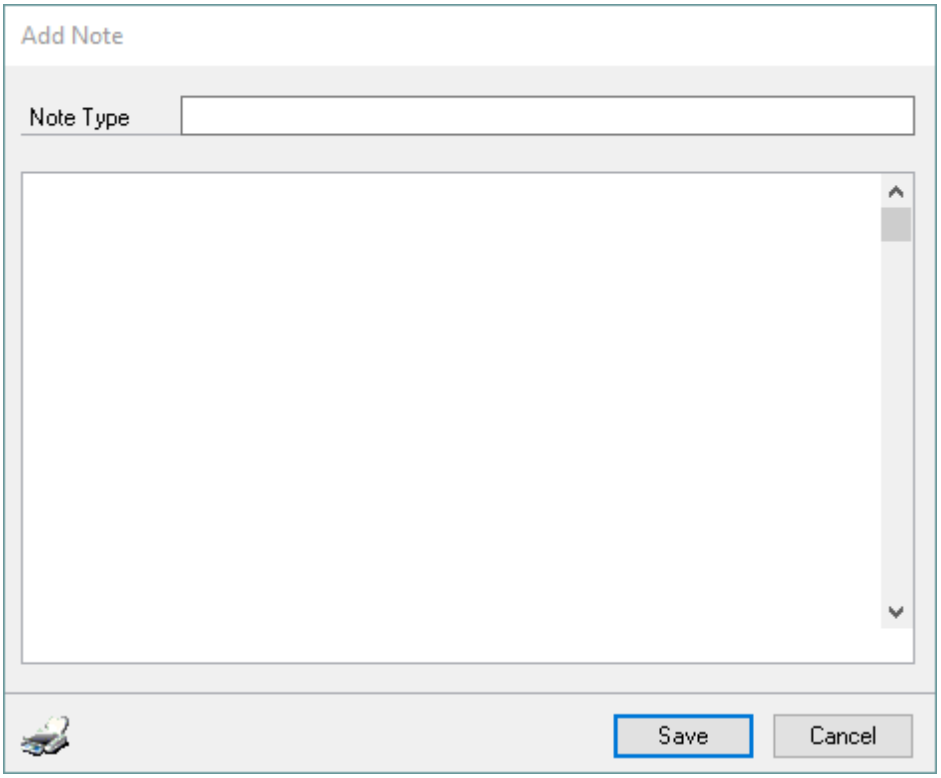
3. Select the Extender Note from the Additional menu or enter the Hot Key for the

Notes window if one was setup.



To add a note:

1. Open the Notes window.
2. Click 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 Save.

To edit an existing note:

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

To remove a note:

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

To print a Notes list:

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

To export a Notes list to Microsoft® Excel®:

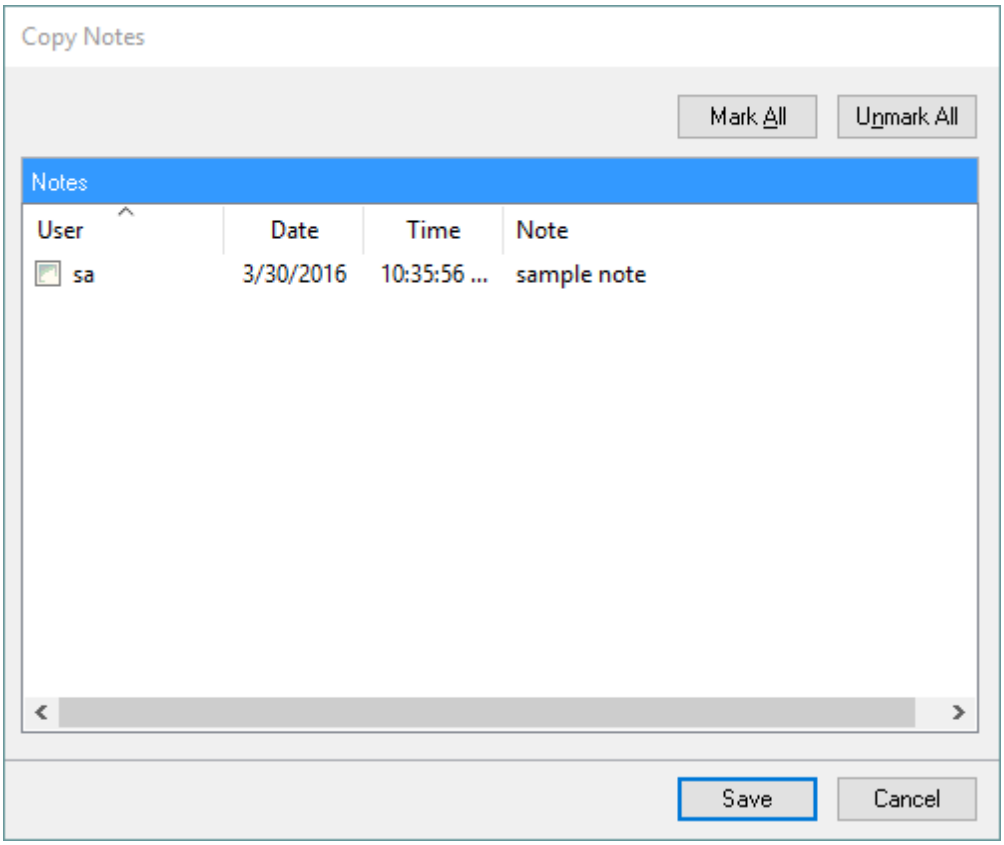
1. Open the Notes window.
2. Click the Excel button .

Special Cases

There are a number of Dynamics GP forms that have additional functionality when Extender Notes are linked to them:

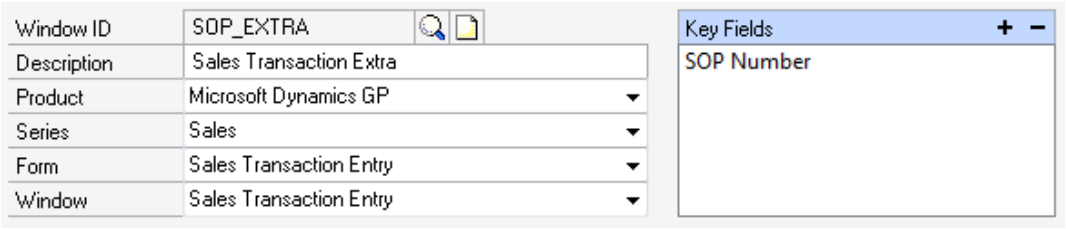
- Sales Transaction Entry - transfers Extender Notes when sales transactions are transferred through the sales cycle. For example, when an order is transferred to an invoice, the Extender information entered on the order is duplicated on the invoice
- Item Maintenance - duplicates notes from an Extender Note when an item is copied to a new item
- General Ledger Transaction Entry - duplicates notes from an Extender Note when transactions are copied

When the Item Maintenance and General Ledger Transaction notes are copied, a window is displayed that allows you to select which notes you want to copy. All Sales Transaction notes are copied.



To set up a sales transaction special case:

1. Open the Extender Windows window and enter a Window ID and Description.

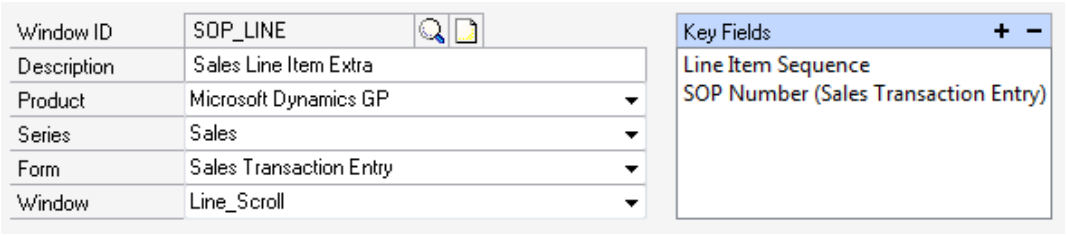


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Transaction Entry as the Form and Window.
5. Add SOP Number as the Key Field.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred.

To set up a sales transaction line special case (method 1):

1. Open the Extender Windows window and enter a Window ID and Description.

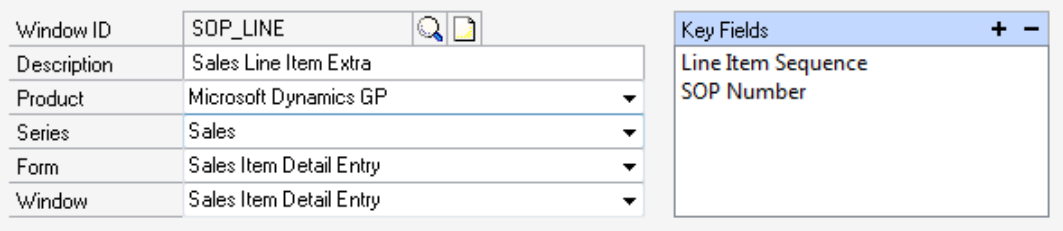


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Transactions as the Form.
5. Select Line_Scroll as the Window.
6. Add SOP Number from the Sales Transaction Entry window and Line Item Sequence from the Line_Scroll window as the Key Fields.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred.

To set up a sales transaction line special case (method 2):

1. Open the Extender Windows window and enter a Window ID and Description.

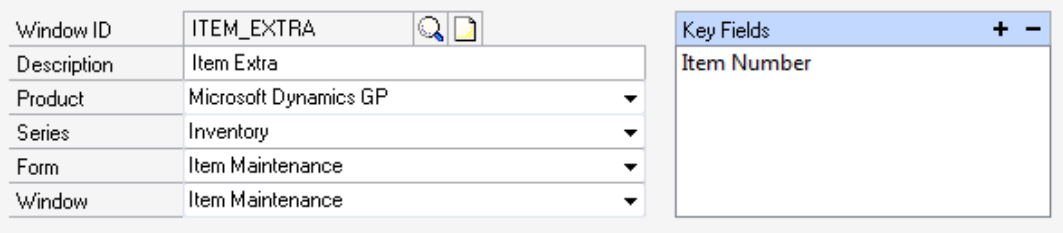


2. Select Microsoft Dynamics GP as the Product.
3. Select Sales as the Series.
4. Select Sales Item Detail Entry as the Form and Window.
5. Add SOP Number and Line Item Sequence as the Key Fields.

SOP Type should not be added as a key field. If SOP Type is added, the Extender information will not be transferred.

To set up an item maintenance special case:

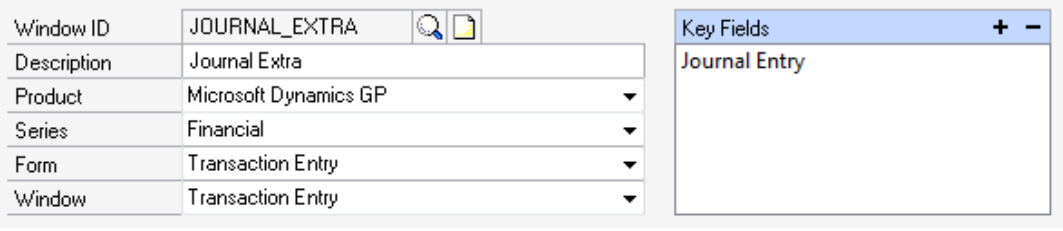
1. Open the Extender Windows window and enter a Window ID and Description.



2. Select Microsoft Dynamics GP as the Product.
3. Select Inventory as the Series.
4. Select Item Maintenance as the Form and Window.
5. Add Item Number as the Key Field.

To set up a general ledger transaction special case:

1. Open the Extender Windows window and enter a Window ID and Description.



2. Select Microsoft Dynamics GP as the Product.
3. Select Financial as the Series.
4. Select Transaction Entry as the Form and Window.

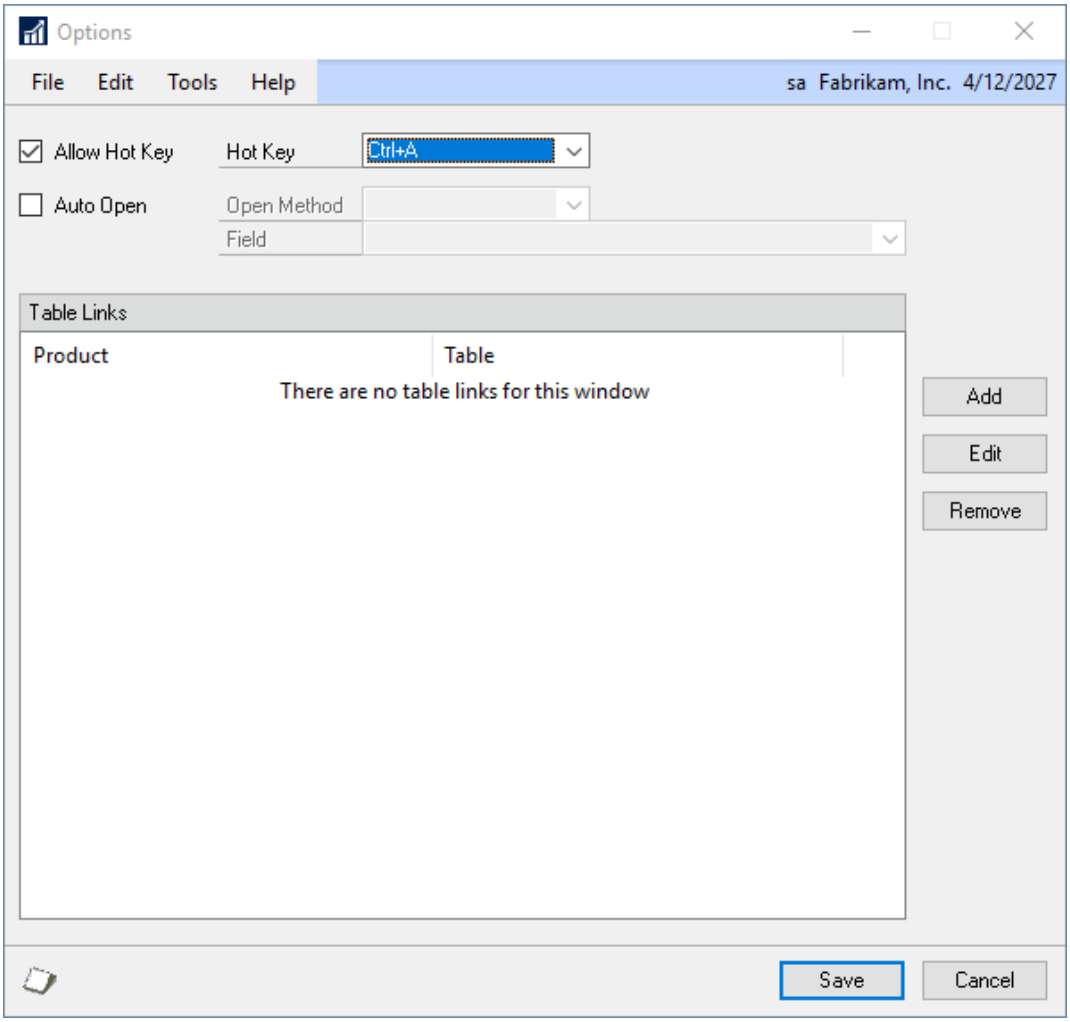
5. Add Journal Entry as the Key Field.

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 Note List Window. Hot Keys allow a user to open a window by using a set combination of key strokes, for example, CTRL+E. Once a Hot Key is set for a window, that combination is removed from the list of available hot keys.

To set a Hot Key for a Window:

1. Click Options.
2. Mark the Allow Hot Key option.



3. Select the Hot Key from the Hot Key list.
4. Click Save.
5. You will then need to re-launch Microsoft Dynamics GP for the Hot Key to work.

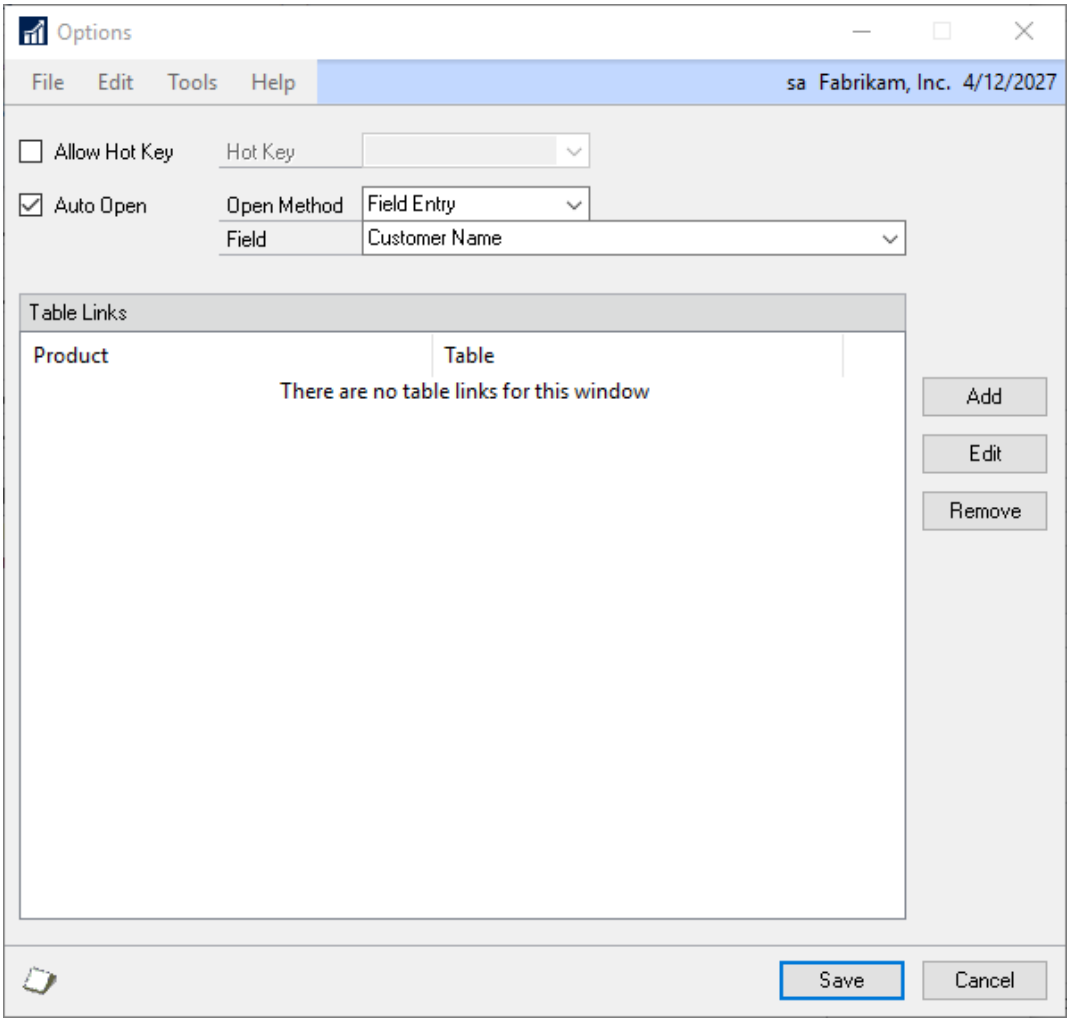
Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. To enable this option, mark the Auto Open option and select a field and open method.



You should not use any of the key fields to trigger an auto open.

To set Auto Open and Auto Close options:

1. Click Options.
2. Mark the Auto Open option.



3. Select the Open Method. The three options are Field Entry, Field Exit, and Line Change. The Field Entry will trigger when you enter the field specified, whereas, the Field Exit will trigger when you exit the field specified. The Line Change option is to be used when you have detail on the window using the scrolling grid option.

This will trigger when you move to the next line in the scrolling window.

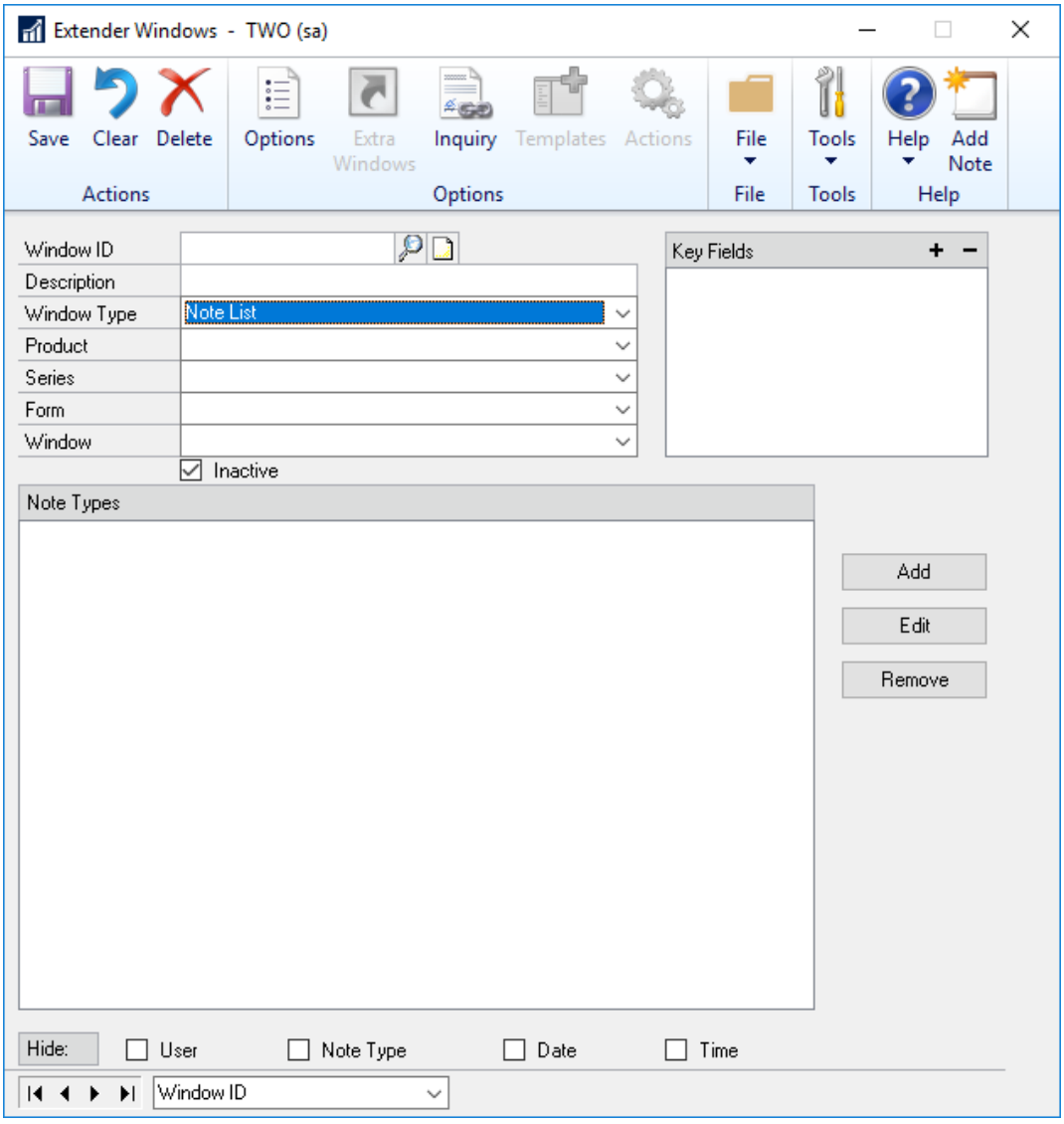
4. Select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position in the Microsoft Dynamics GP window.
5. Click Save.
6. You will then need to re-launch Microsoft Dynamics GP to enable to Auto Open functionality.

Inactivate Note List Window

If a there is a need to inactivate a Note List window so that it isn't available from a Microsoft Dynamics GP window without removing the window, the Inactive check box can be used to do so.

To set a Note List window as Inactive:

1. Open the Extender window that you want to set as Inactive.
2. Mark the Inactive check box.



3. Save the Extender window.

Modifying an Existing Notes Window

You can make changes to a Notes window using the Extender Window window.

To modify an existing Notes window:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Note Window from the Windows Resource list that you want to modify.
3. Click Open.
4. Enter new information for the Notes window.
5. Click Save.

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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Note Window from the Windows Resource list that you want to remove.
3. Click Open.
4. Click Delete.

Table Links

This module will walk you through the adding of Table Links to a Note List Window.

Table Links

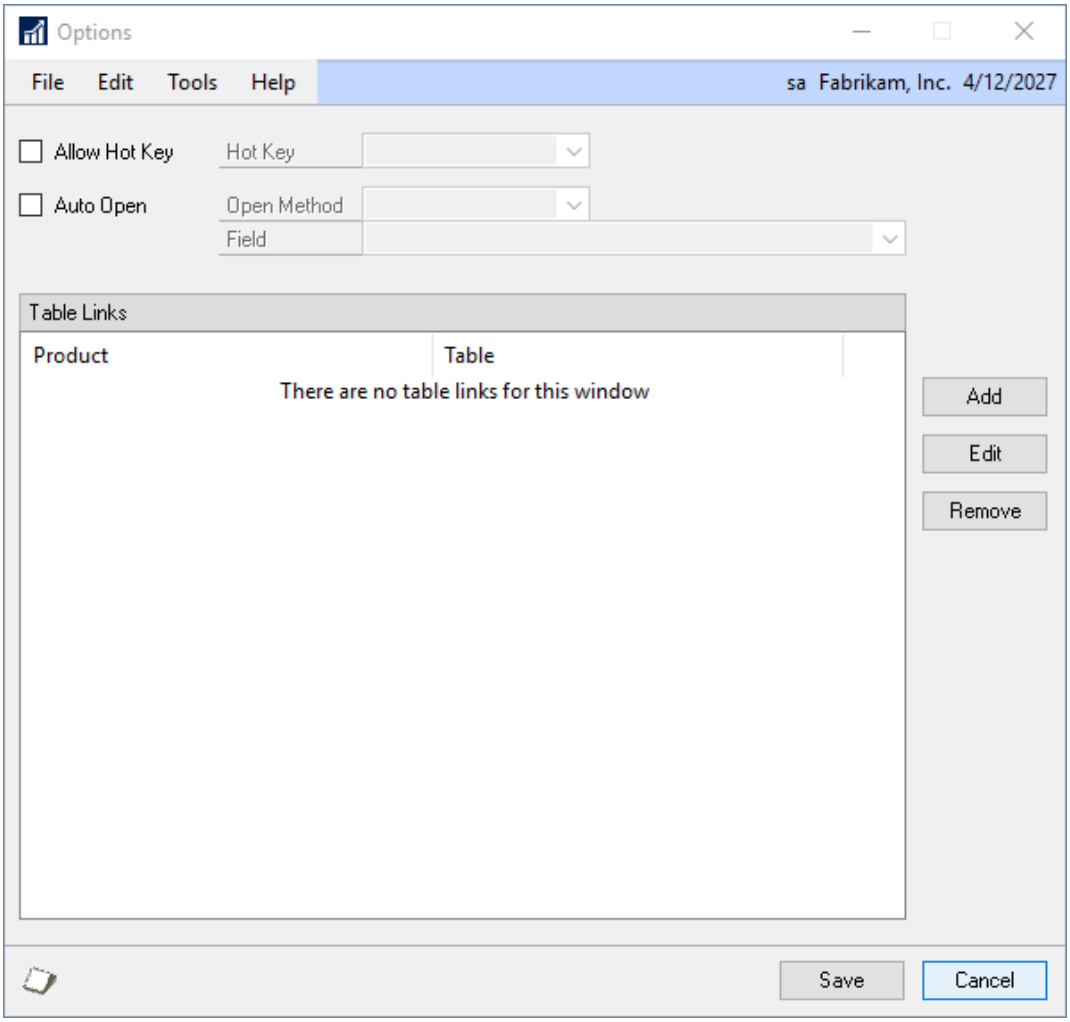
Linking an Extender Note to a table ensures that the Extender Note text is deleted when the corresponding table record is removed. A note can be linked to more than one table. When linked to more than one table, the Extender Note text will only be deleted when there is not a corresponding record in any of the linked tables.



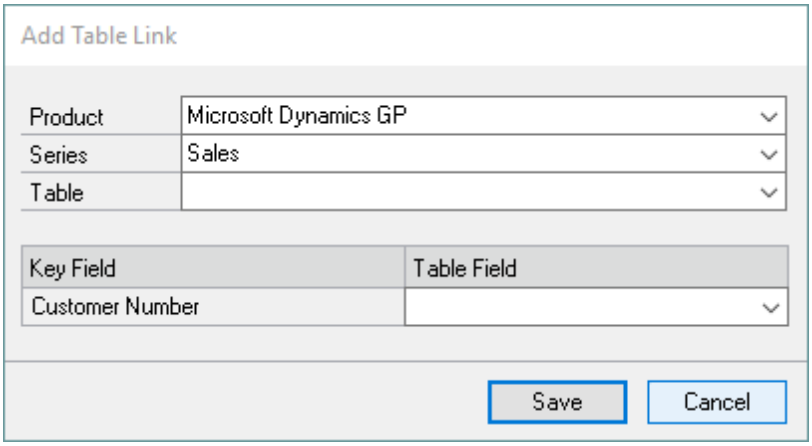
If you link an Extender Window to a work table and not the corresponding history table, then the Extender data will be deleted when the record is posted because the data is removed from the work table during posting.

To link a note window to a table:

1. Open the Extender Windows window and select the note window that you want to link.
2. Select Options >> Table Links to open the Table Links window.



3. Click the Add button beside the Table Links list.



4. Select the Product, Series and Table that you want to link to.+
5. Match the Key Fields on the window to fields in the Table.
6. Click Save.

Inquiries

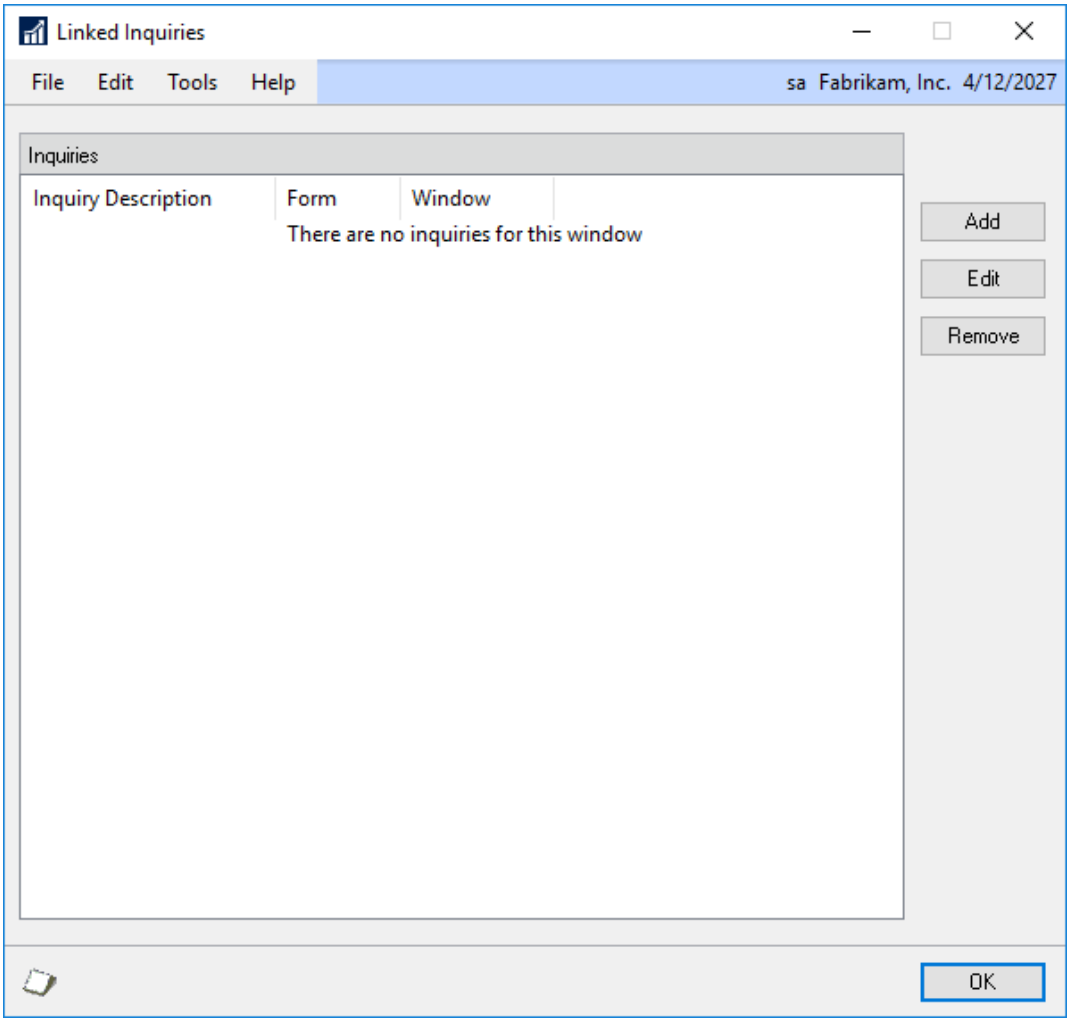
This module will walk you through the setup of adding an Inquiry to a Note List Window. An Extender Inquiry is used to display data entered on an Extender Note List Window from another Microsoft Dynamics GP form. You should use an Extender Inquiry when you have attached an Extender Note List Window to a Microsoft Dynamics GP form and want to be able to view or edit the information entered on another Microsoft Dynamics GP form.

Adding a New Inquiry

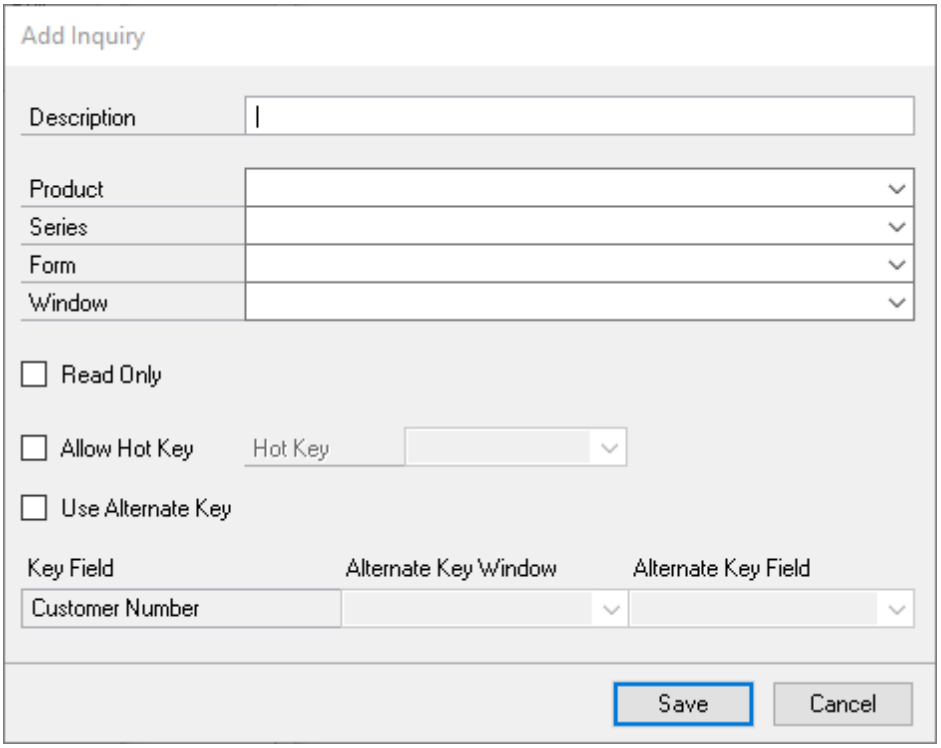
Use the Extender Inquiries window to define new Inquiries.

To add a new Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Note List Window that you would to add the Inquiry to.
3. Click the Inquiry button to open the Linked Inquiries window.



4. Click Add next to the Inquiries list.



5. Enter a Description for the Inquiry. This will be the name you see on the Additional Menu of the form you add it to.
6. Select the Product, Series, Form and Window to link the Extender Inquiry to.
7. You can set the window to Read Only and put a Hot Key on it if you would like.
8. 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.

Modifying an Existing Inquiry

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

To modify an existing Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Note List Window that you added the Inquiry too.
3. Click the Inquiry button.
4. Select the Inquiry that you wish to Modify and click the Edit button next to the Inquiries list.
5. Enter new information for the Inquiry.
6. Click Save and OK.

Removing Inquiries

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

To remove an Inquiry:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Extender Window you wish to remove the Inquiry from.
3. Click the Inquiry button.
4. Select the Inquiry that you want to remove from the Inquiries list.
5. Click the Remove button next to the Inquiries list.

Window Groups

This section will guide you through the creation of a new Extender Window Group. Window Groups are used to group Field Entry Windows and Note List Windows to a single menu item or shortcut key. Conditions can be added to each window so that a window only opens when the conditions have been met. For example, you could use Window Groups to group multiple Extender Windows that are tracking different types of information against different item types. Only the window that is relevant for the current item type would open when the window group is selected.

Basic Setup

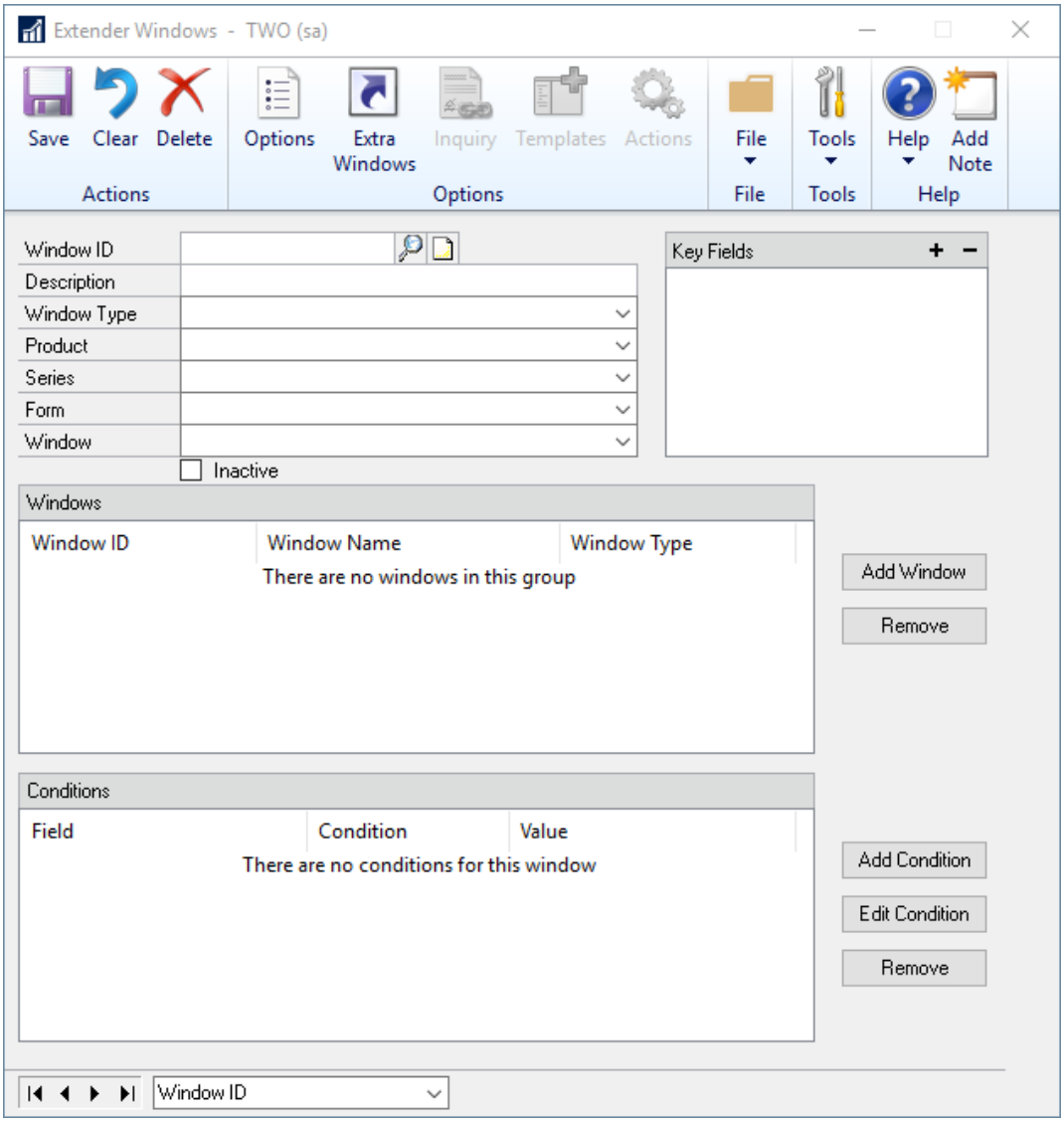
This module will walk you through setting up a Window Group.

Adding a New Window Group

You can use the Extender Windows window to create new Window Groups.

To add a Window Group:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Windows from the Extender Objects list.
3. Click New.



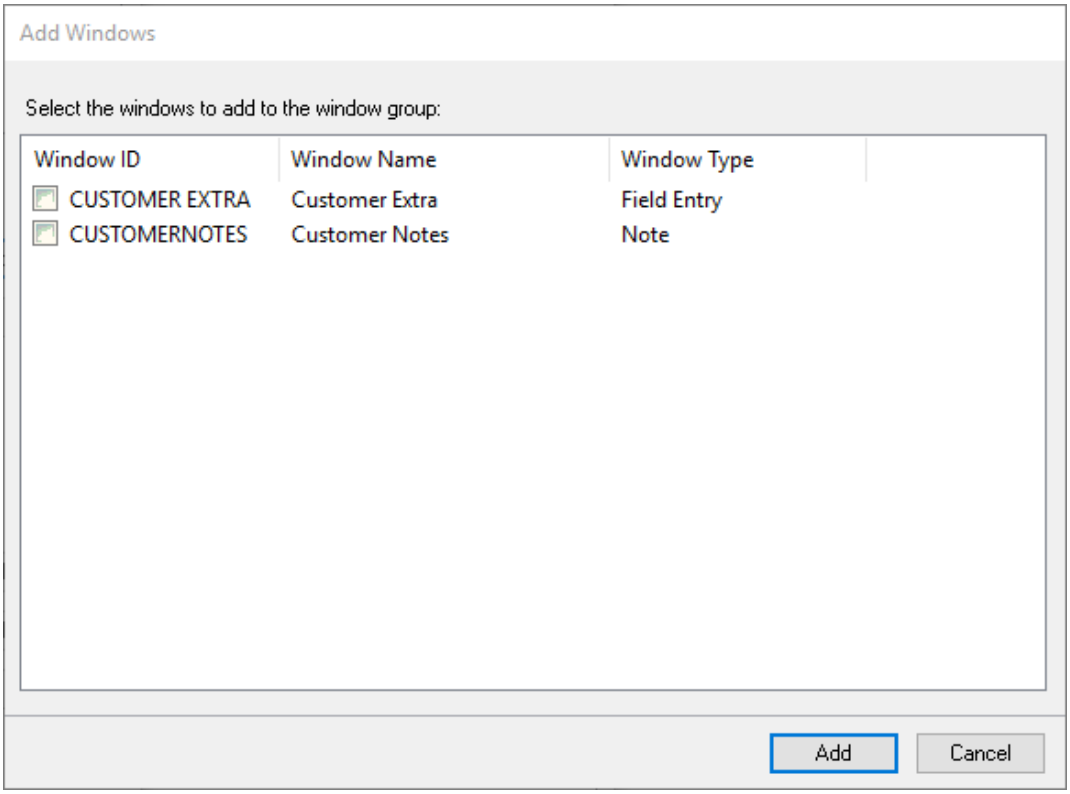
4. Enter an ID and Description for the Window.
5. Select the Product, Series, Form and Window for the Window Group.
6. Add the Key Fields for the form selected to add the Window Group to.
7. Add Windows and Conditions.
8. Click Save.

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 Field Entry Windows and Note List Windows. 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 the Add Window button next to the Windows list.



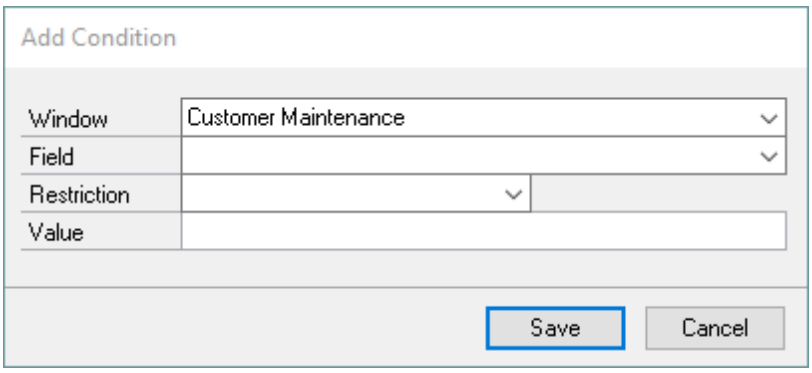
2. Select the windows that you want to add to the group. You can select more than one window at a time.
3. Click Add.

To remove a window from a group:

1. Select the window that you want to remove from the Windows list.
2. Click the Remove button next to 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 the Add Condition button next to 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 Save.

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 the Edit Condition button next to the Conditions list.
4. Enter the new information for the condition.
5. Click Save.

To remove a window from a group:

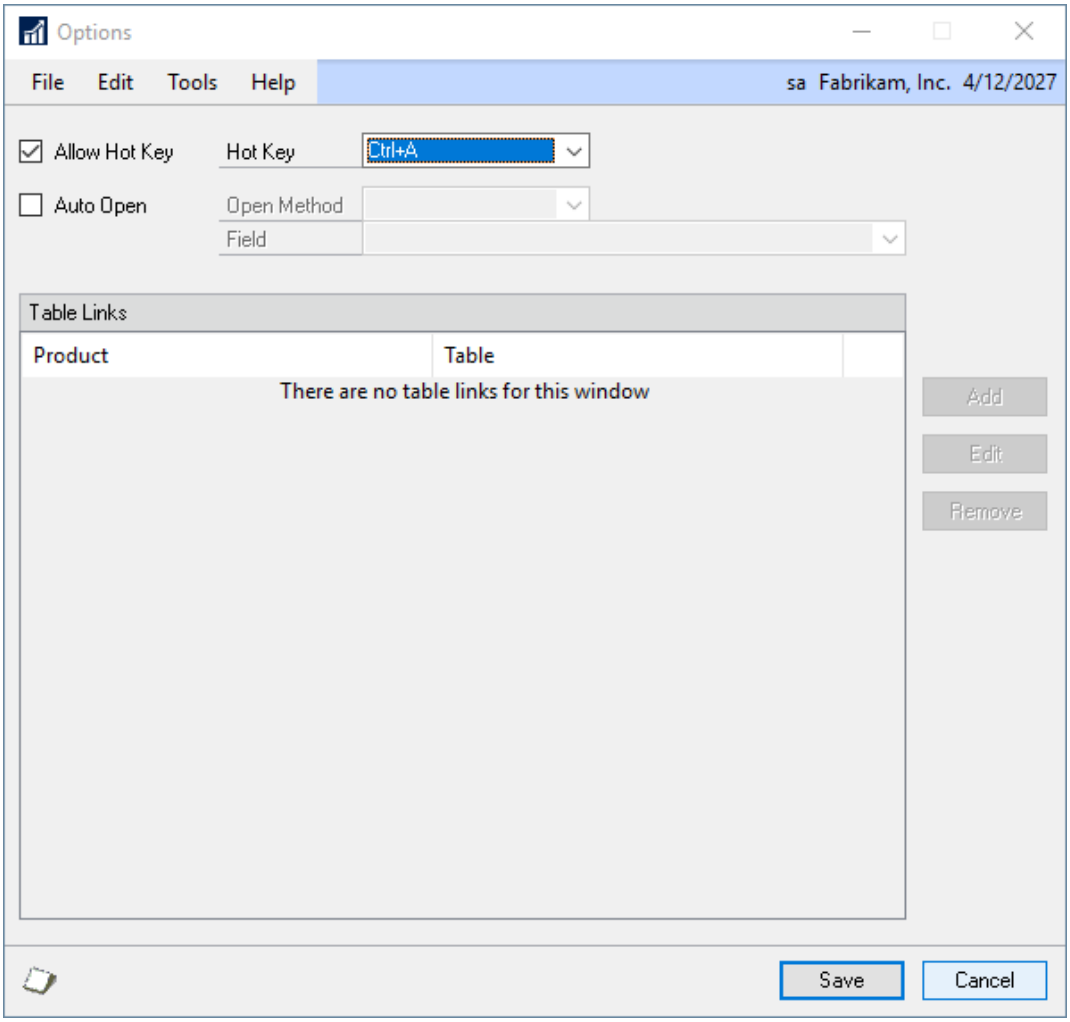
1. Select the window that contains the condition that you want to modify.
2. Select the condition that you want to remove from the Conditions list.
3. Click the Remove button next to the Conditions list.

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 Group. Hot Keys allow a user to open a window by using a set combination of key strokes, for example, CTRL+E. Once a Hot Key is set for a window, that combination is removed from the list of available hot keys.

To set a Hot Key for a Window:

1. Click Options.
2. Mark the Allow Hot Key option.



3. Select the Hot Key from the Hot Key list.
4. Click Save.
5. You will then need to re-launch Microsoft Dynamics GP for the Hot Key to work.

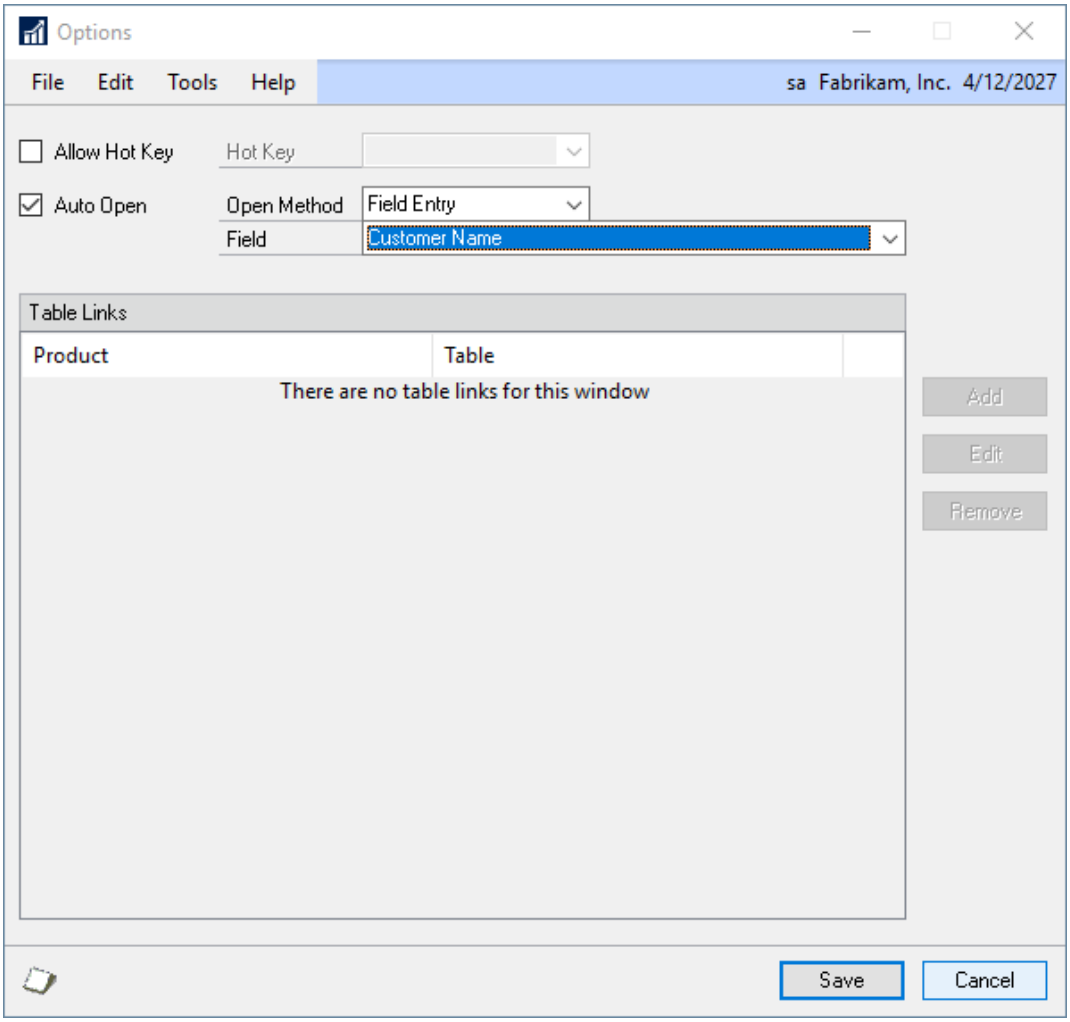
Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. To enable this option, mark the Auto Open option and select a field and open method.



You should not use any of the key fields to trigger an auto open.

To set Auto Open and Auto Close options:

1. Click Options.
2. Mark the Auto Open option.



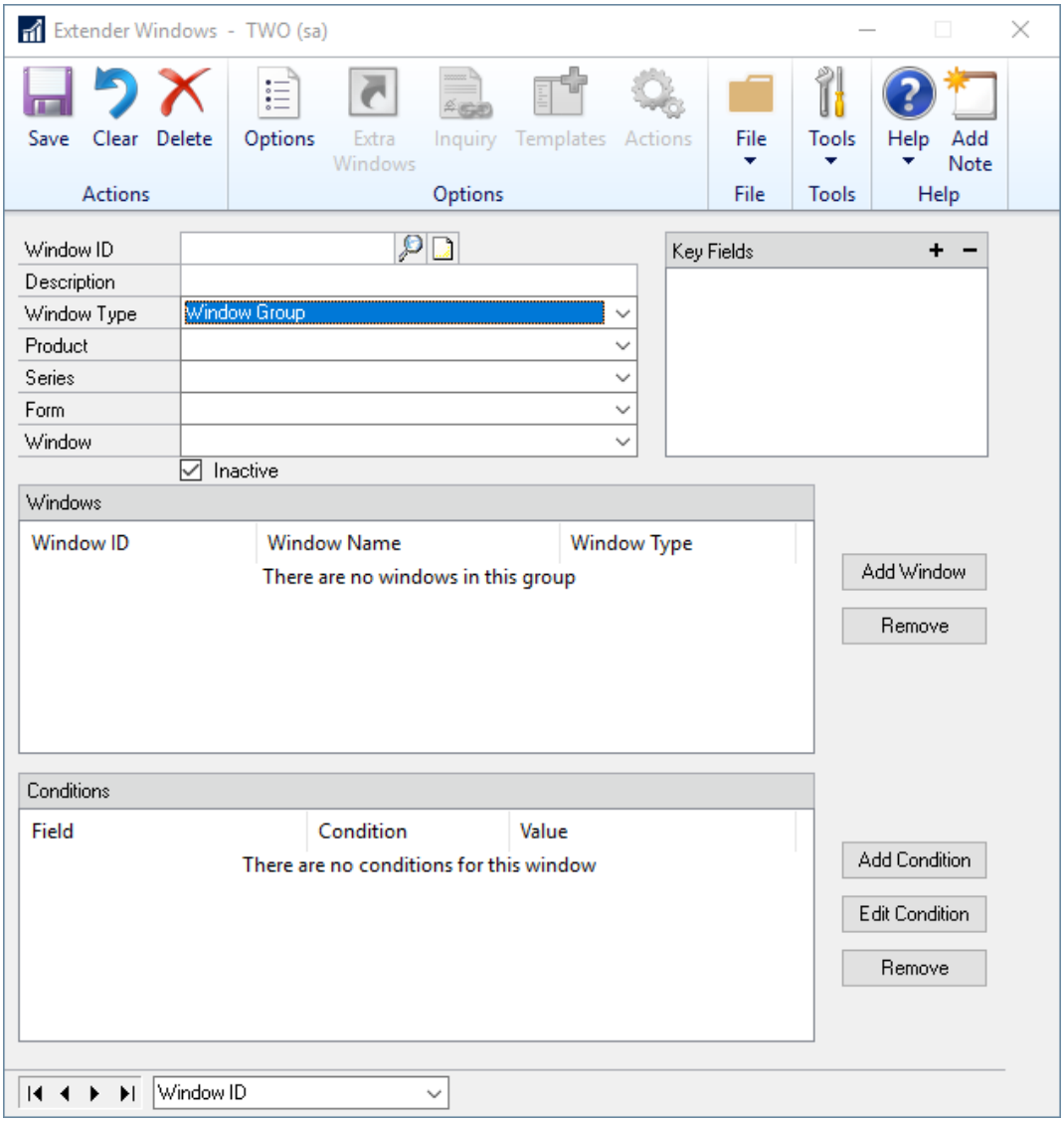
3. Select the Open Method. The three options are Field Entry, Field Exit, and Line Change. The Field Entry will trigger when you enter the field specified, whereas, the Field Exit will trigger when you exit the field specified. The Line Change option is to be used when you have detail on the window using the scrolling grid option. This will trigger when you move to the next line in the scrolling window.
4. Select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position in the Microsoft Dynamics GP window.
5. Click Save.
6. You will then need to re-launch Microsoft Dynamics GP to enable to Auto Open functionality.

Inactivate Window Group

If a there is a need to inactivate an entire Window Group instead of a particular window in it so that it isn't available from a Microsoft Dynamics GP window without removing the window, the Inactive check box can be used to do so.

To set a Window Group as Inactive:

1. Open the Extender Window Group that you want to set as Inactive.
2. Mark the Inactive check box.



3. Save the Extender Window Group.

Modifying an Existing Window Group

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

To modify an existing Window Group:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Window Group from the Window Resource list that you want to modify.

3. Click Open.
4. Enter new information for the Window Group.
5. Click Save.

Removing Window Groups

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

To remove a Window Group:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >>Extender).
2. Select the Window Group from the Window Resource list that you want to remove.
3. Click Open.
4. Click Delete.

Forms

This section 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. Extender Forms can be used to track any type of master file or transaction information that is not already stored in Microsoft Dynamics GP. For example, you could use an Extender Form to store worksheet or job details.

An Extender form allows for up to 30 fields to be added. You can add up to 10 detail fields to a Form as well. Adding detail fields to a form will allow you to track multiple records against the ID Field of the Form.

Form templates are available to default data into these fields. Once setup, the fields can be linked to existing SmartLists as well as Views can be created to allow for reporting on the additional data that is being collected.

Basic Setup

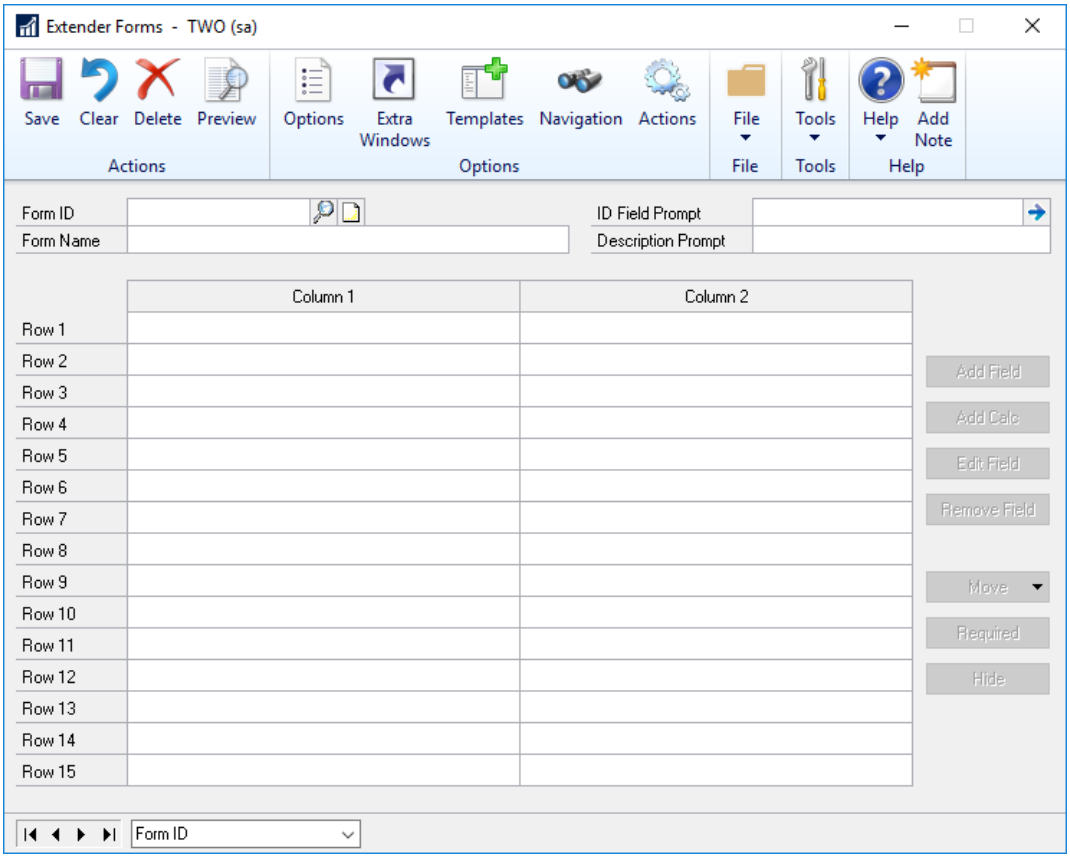
This module will walk you through the basic setup of an Extender Form.

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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Forms from the Extender Objects list.
3. Click New.



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 15 in Column 1 that you want to use.
7. Enter prompts and select field types for fields 1 to 15 in Column 2 that you want to use.
8. Click Save.

A lookup in column 1 will show the description for that lookup value in column 2 unless there is a field in the same row in column 2.

Setting ID Field Options

Use the ID Field Options window to set advanced options for the ID field; using an existing lookup as the ID field, auto-incrementing the ID field, using secondary lookups and setting the description field to required.

Selecting the Use Existing Lookup option allows an existing Microsoft Dynamics GP or Extender lookup to be selected as the ID Field for the form. When the lookup button is

selected, the existing lookup will be opened and the selected lookup value will be returned to the ID field. When a value is entered into the ID field, it is validated against the existing values for the lookup. Only existing lookup values can be entered or selected for the ID field. New ID field values cannot be entered. If the Description Prompt field is not being used on the form, the Description for the lookup will populate the Description Prompt field. For example, if you are using the Customer lookup, the ID Field Prompt will display the selected Customer Number and then Description Prompt will display the Customer Name.

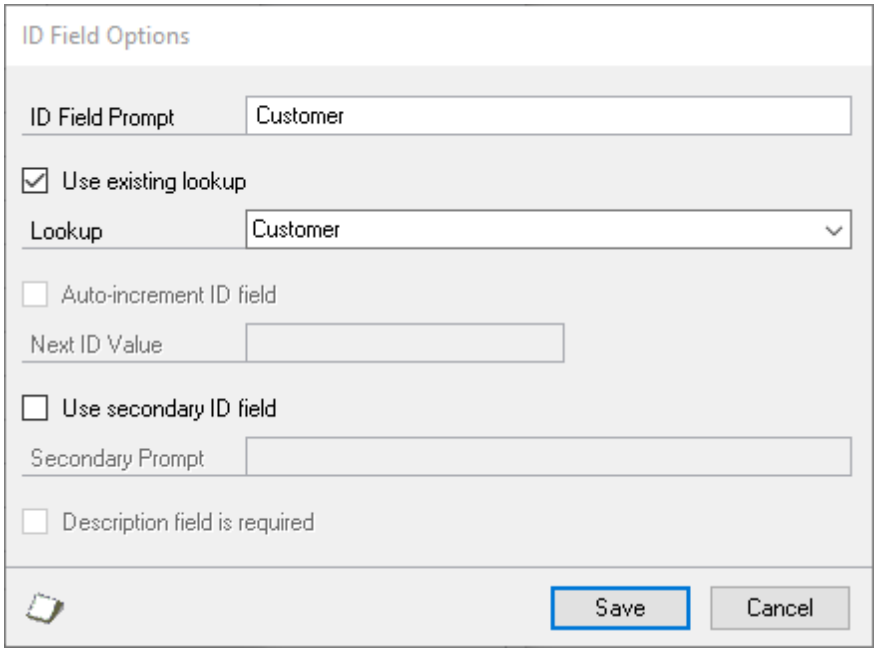
Auto-incrementing allows you default the ID field to the Next ID value. This value is updated every time a new record is saved, by adding 1 to the previous value. The Next ID value can be a combination of letters and numbers, but must always end in a number.

Selecting the Use secondary ID field options allows a secondary ID field to be assigned to the record. This permits multiple secondary records to be linked to the primary ID field. This option is only available when the "Use Existing Lookup" option is used.

Selecting the Description Field is required option will make the Description Prompt field required for data entry on the form.

To use an existing lookup:

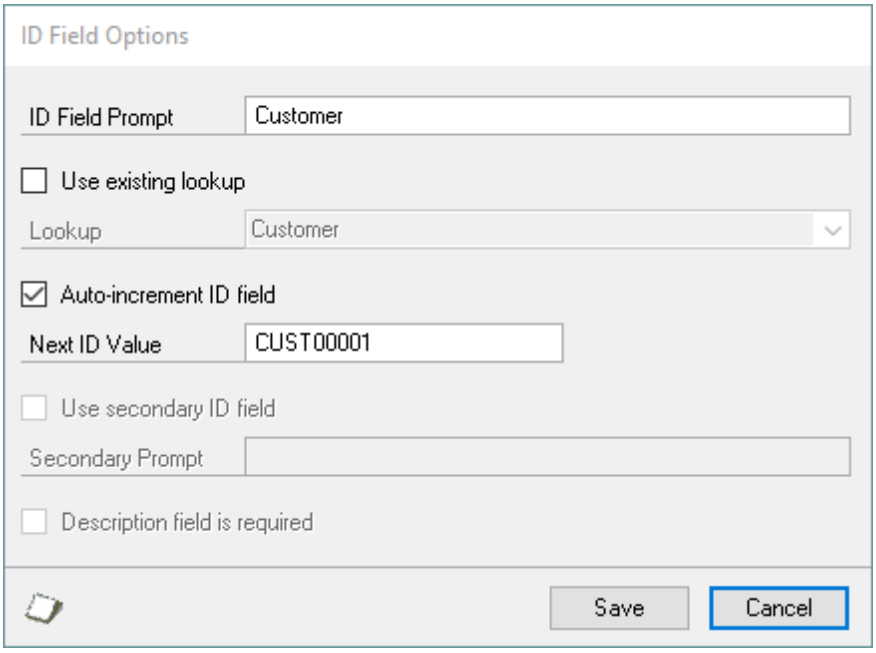
1. Click the expansion button next to the ID Field Prompt.



2. Mark the Use existing lookup check box.
3. Select the Lookup.
4. Click Save.

To auto-increment the ID field:

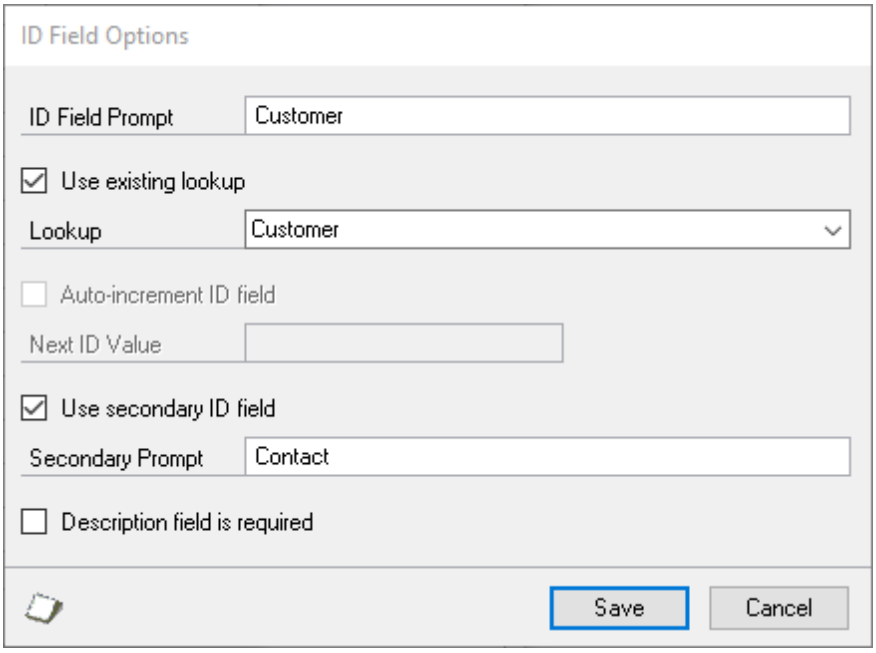
1. Click the expansion button next to the ID Field Prompt.



2. Mark the Auto-increment ID field check box.
3. Enter the Next ID value.
4. Click Save.

To add a secondary lookup:

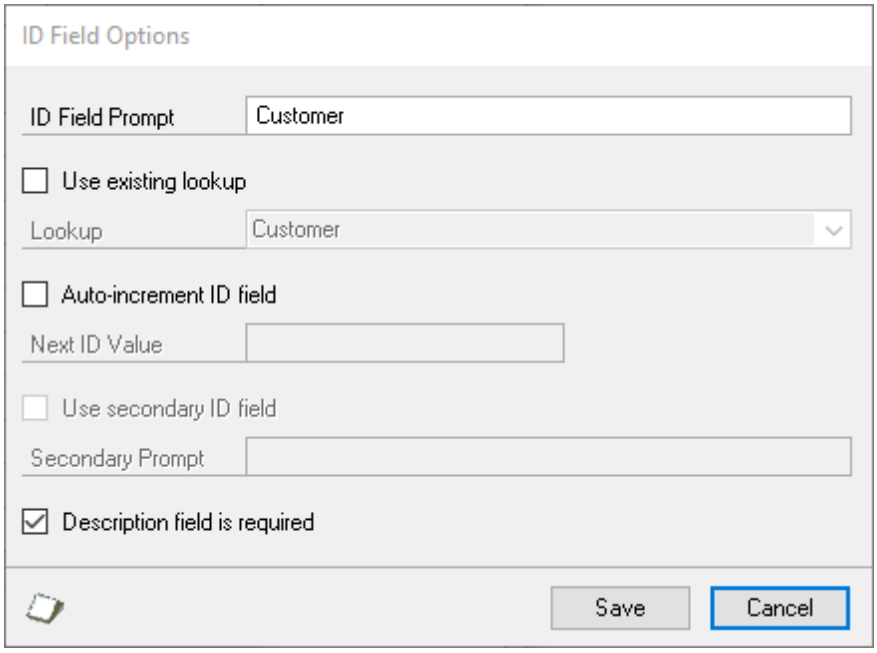
1. Click the expansion button next to the ID Field Prompt.



2. Mark the Use existing lookup check box.
3. Select the Lookup.
4. Mark the Use secondary ID field check box.
5. Enter the Secondary Prompt.
6. Click Save.

To set the description field to required:

1. Click the expansion button next to the ID Field Prompt.



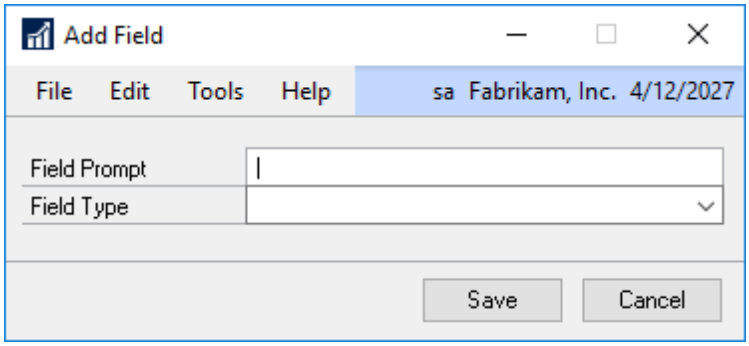
2. Mark the Description field is required check box.
3. Click Save.

Adding Fields

On the form, you can add up to 30 fields using any of the data types discussed previously.

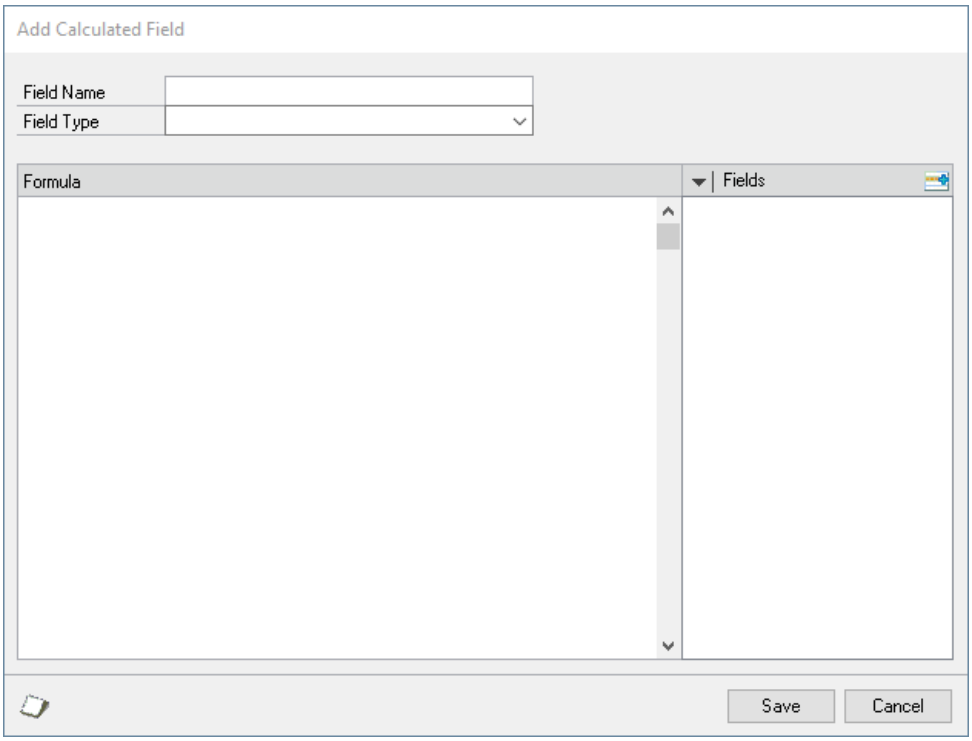
To add fields to an Extender Form:

1. Click in the field where you want to add the field.
2. Data Entry Field:
    a. Click the Add Field button to add a date entry field.



b. Enter the Field Prompt. This is what will be displayed on the form as the field description.
c. Select the Field Type for the field. Depending on the type selected, you may need to select additional information such as the number of decimal places.
d. Click Save.

3. Calculated Field
   a. Click the Add Calc button to add a calculated field.

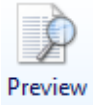


   b. Enter the Field Name. This is what will be displayed on the form as the field description.
   c. Select the Field Type for the calculated field.
   d. Enter the Formula you want to use for the calculated field.
   e. Click Save.

Using Forms

After creating a Form, you can test it using the Extender Forms 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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Open the Form that you want to use from the Extender Resources list.
3. Click the Preview button 

.

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 Save.

To delete a Form record:

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

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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the form to modify from the Extender Resources list
3. Click Open.
4. Enter new information for the Form.
5. Click Save.

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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Form that you want to remove from the Extender Resources list.
3. Click Open.
4. Click Delete.

If you don't need the detail scrolling grid on a Form, you can remove it using the Extender Form Options window.If you have already entered data into the scrolling grid, the data will also be deleted.

To remove the detail in the scrolling grid:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select the Forms resource type under the Solution that the Form exists in.
3. Select the Form that you want to remove in the Extender Resources list.
4. Click Open.
5. Click the Options button.
6. Uncheck the Display Scrolling Grid checkbox.
7. Click Save.
8. Click Save.

Setting Required and Hiddend Fields

Setting a field to be required means that the field must be populated before the data can be saved, those fields must be populated. If a field isn't marked to be required, the user does not have to enter data into the field before saving the data.

To set required fields for a Form:

1. Select the Field you would like to make required.
2. Click the Required button. The text in the field should turn bold to indicate it is marked required.

Setting a field to be hidden means that the field will not appear on the form. It can still be used in the Calculations, Actions, etc.

To set hidden fields for a Form:

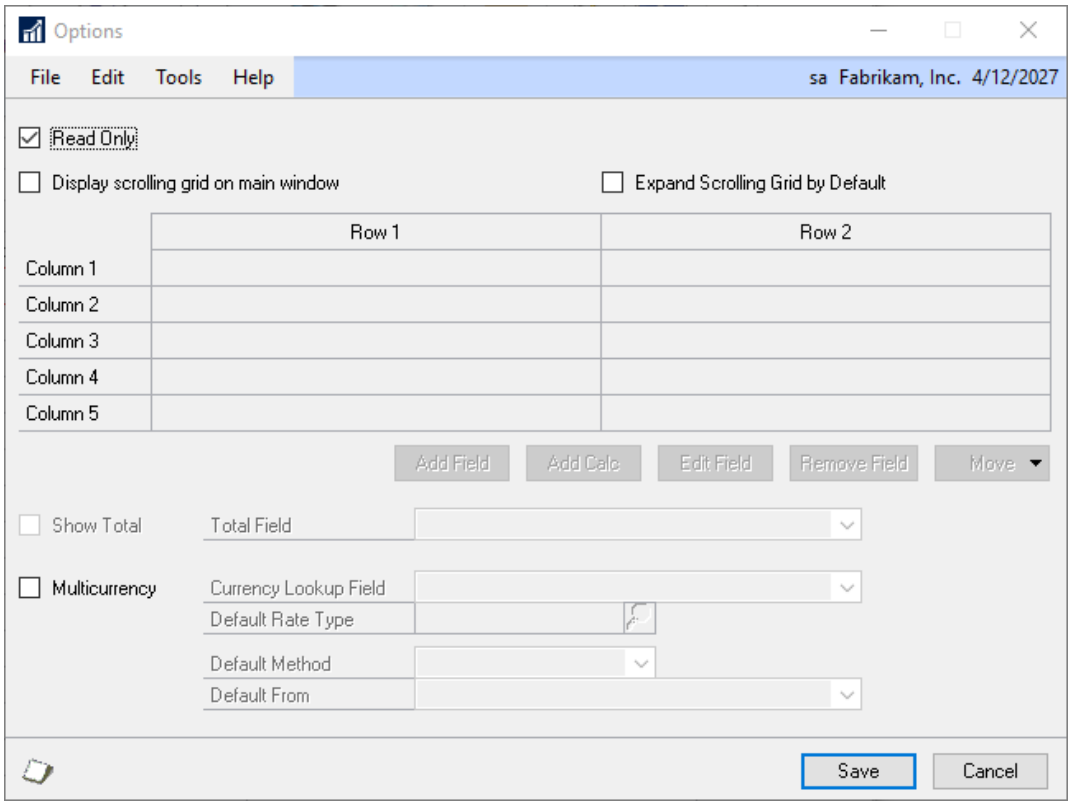
1. Select the Field you would like to make required.
2. Click the Required button. The text in the field should turn bold to indicate it is marked required.

Setting Read Only Option

Use the Options window to set the form as Read Only.

To set form to Read Only:

1. Click the Options button.



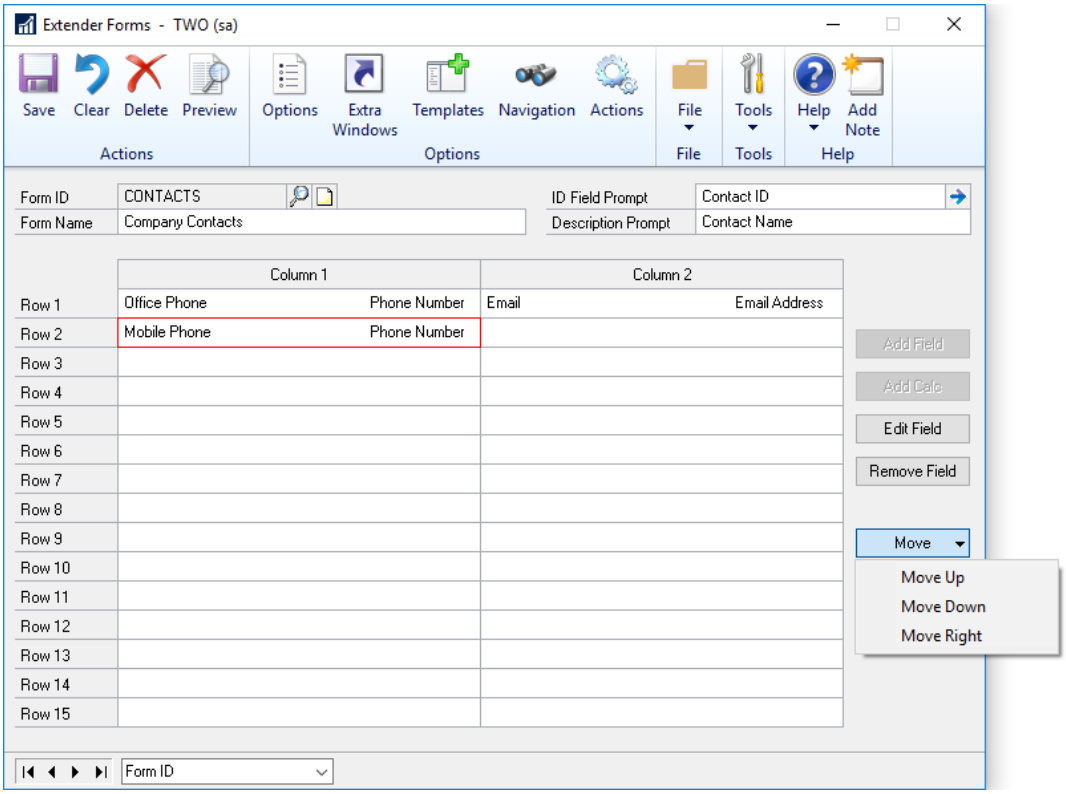
2. Mark the Read Only option.
3. Click Save.

Moving Fields

Once data has been entered into an Extender Form, the positions of the fields can be moved using the Move Fields button. This will move the data with it.

To move a field on the main Window a new position:

1. Open the Extender form that you want to move fields for.
2. Select the field you wish to move.



3. Click the Move drop down button to the right of the Field List and select the option that will move the field to the desired position. If you move a field up or down and another field already exists in that position, it will swap the two fields positions. Depending on where the field is moved to, you may have to move the field several times to get it there.

To move a field on the detail scrolling grid to a new position:

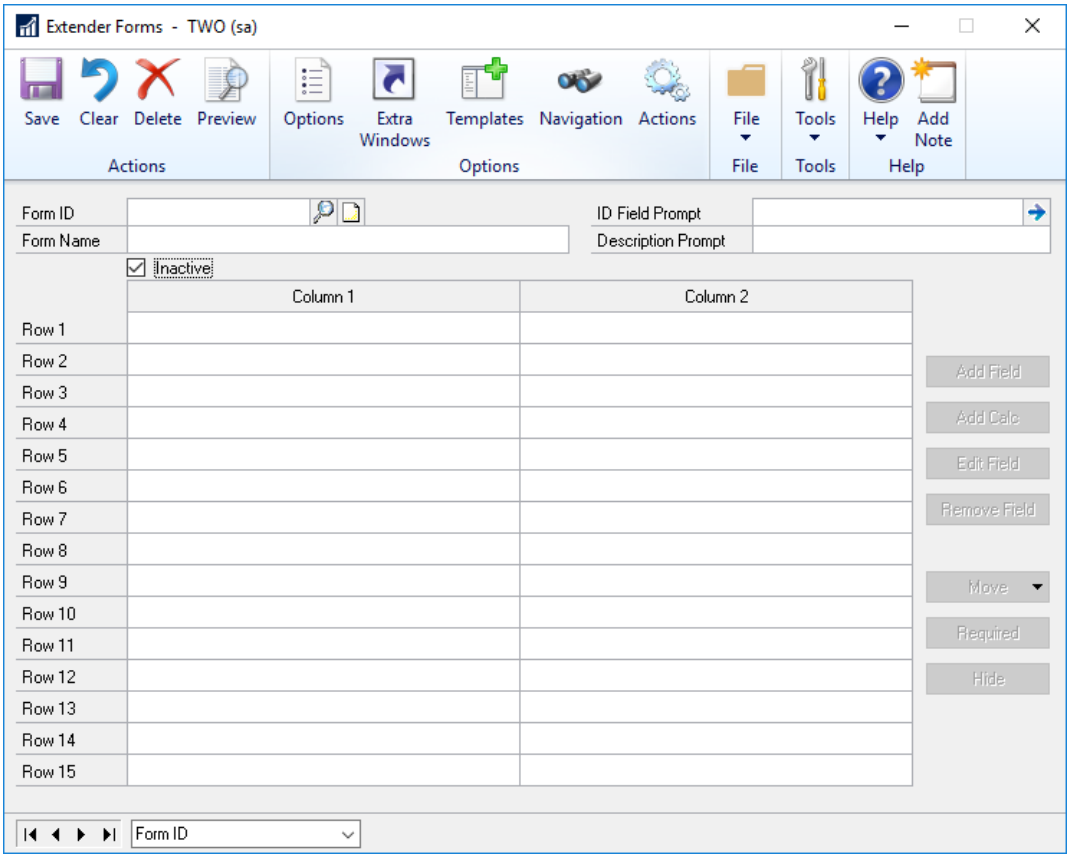
1. Open the Extender window that you want to move fields for.
2. Click the Options Button
3. Select the field that you want to move to a new position
4. Click the Move drop down box below the Scrolling Grid fields and select the option that will move the field where you want to move it to. Depending on where the field is to be moved to, you may have to move the field several times to get it there.

Inactive Form

If a there is a need to inactivate Form so that it isn't available from an Extender Menu without removing the form, the Inactive check box can be used to do so.

To set a Form as Inactive:

1. Open the Extender Form that you want to set as Inactive.
2. Mark the Inactive check box.



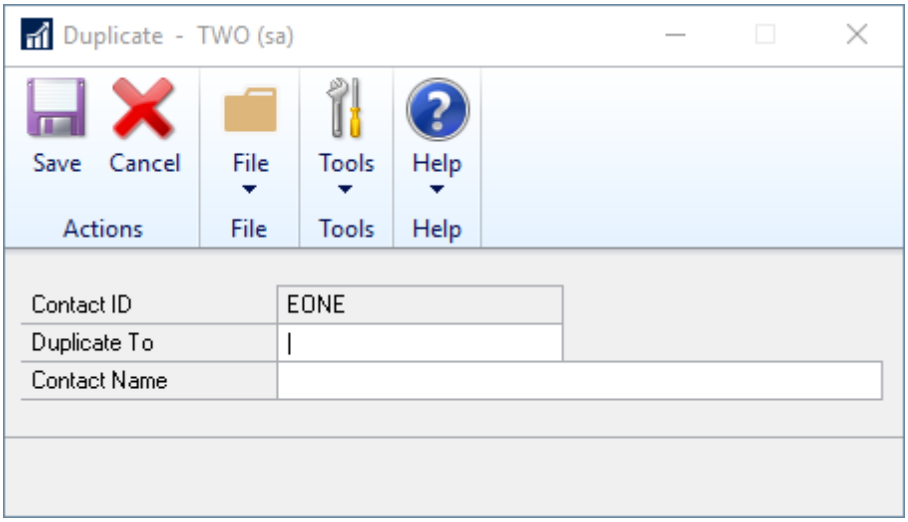
3. Save the Extender Form.

Duplicating Form Records

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 Duplicate.



4. If the auto-increment option is not marked, enter a new ID field.
5. Click Save.

Detail

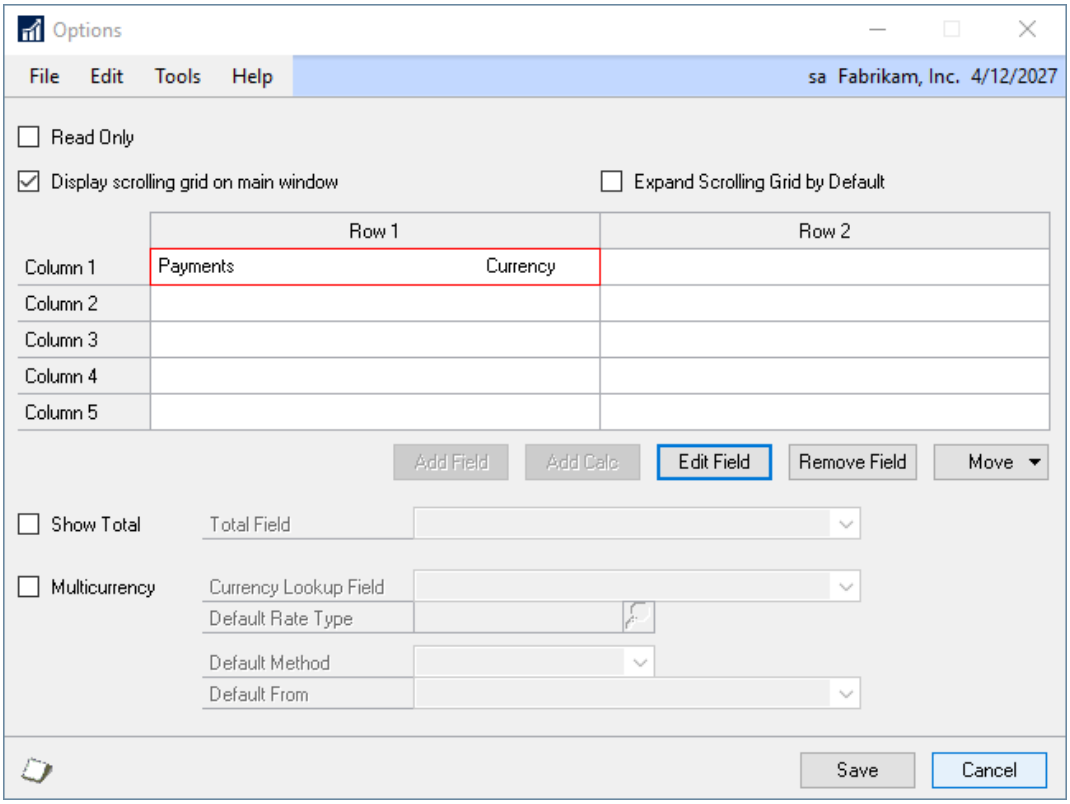
This module will guide you through adding detail fields to a Form. An Extender Form allows you to create a form with a header record and detail line items. Extender Forms can be used to track any type of master file or transaction information that requires line items. For example, you could use an Extender Form to store sales budgets with line items on each budget for each salesperson or sales territory.

Adding Detail Fields to a Form

Use the Extender Forms Options window to define new Detail Fields. Adding Detail fields to an Extender form adds a scrolling window portion to the form. When adding detail to a form, it is not required that you have fields on the main Form setup.

To add a Detail Fields to a Form:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Forms from within the Solution the Form exists in.
3. Select the Form you want to add the Detail Fields to.
4. Click Open or right click and select Open.
5. Click the Options Button



6. Mark the Display scrolling grid on main window checkbox
7. Enter the fields you want in the detail in the same manner as you would on the main window. There are two rows for the detail. By default, the first row will display. As with most scrolling windows, you can expand it to view the second row.
8. Click Save.

Show Totals on Detail Field

When Detail Fields are added to a Form, the option to select a field to Show Totals on becomes available. The Show Total option will create a totaling field below the scrolling window based on the field selected. Only Number, Currency, Percentage and Quantity fields can be totaled. If there are no fields with these types, the Show Total option will not become available.

To select a field to be totaled:

1. Mark the Show Total check box. This check box will be enabled only if there are numeric (Number, Currency, Percentage and Quantity) fields on the form.
2. Select the field that you want to be totaled.
3. Click Save.

Multicurrency

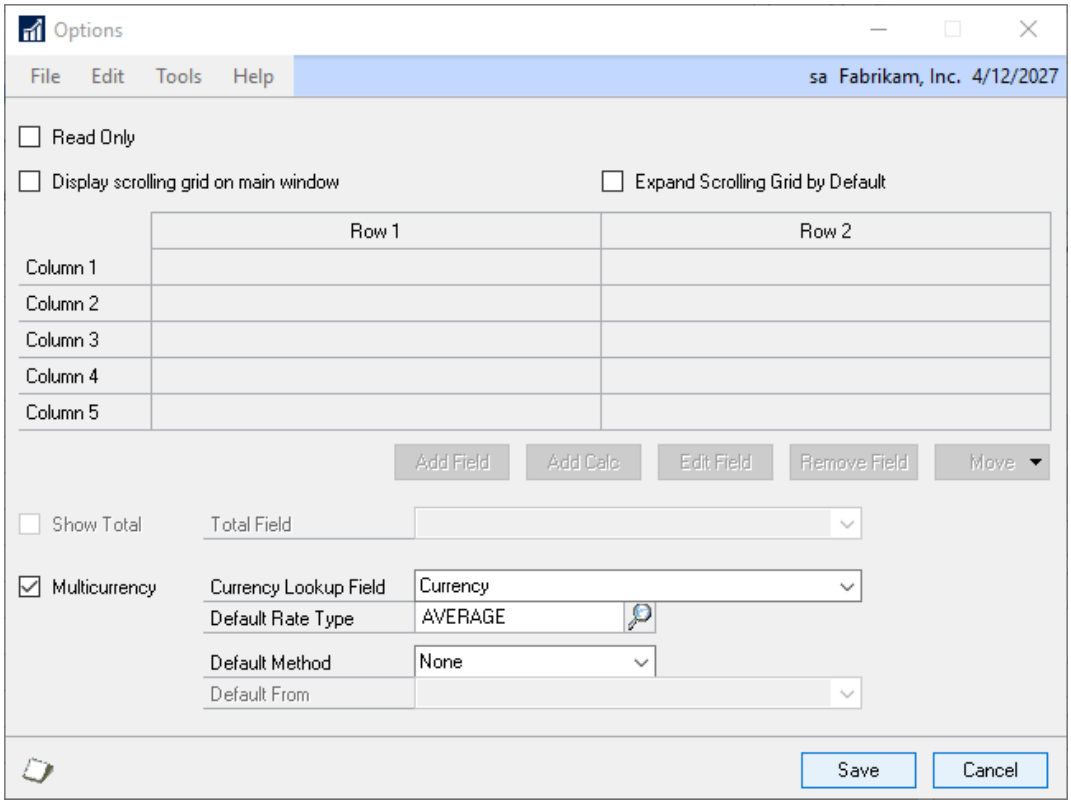
This module will walk you through the usage of Multicurrency on an Extender Form. This functionality is only available if Multicurrency Management is registered in Microsoft Dynamics GP.

Multicurrency Settings

When multicurrency management is registered, there is a Multicurrency button displayed at the bottom of the Extender 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 Options button to open the Options 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 needs to be setup as a lookup to the Currency field. This will allow the end user to select the

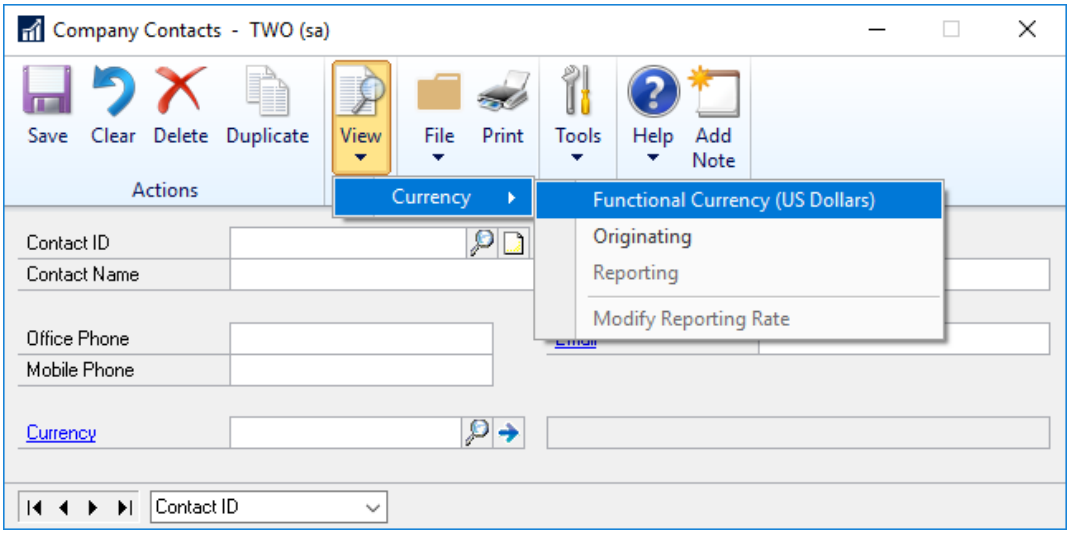
currency to be used from the available currencies.

4. Enter the default rate type that will be used when entering records for the form.
5. Select the default currency method to use for the form:
    - None – the currency will not be defaulted and the user will need to pick the currency to use
    - Functional currency – the currency will always default to the functional currency defined in the Multi-Currency Setup window of Microsoft Dynamics GP
    - Customer – the currency will be defaulted to the currency of the customer that is selected on the form in a Customer Lookup field
    - Vendor – the currency will be defaulted to the currency of the vendor that is selected on the form in a Vendor Lookup field
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.

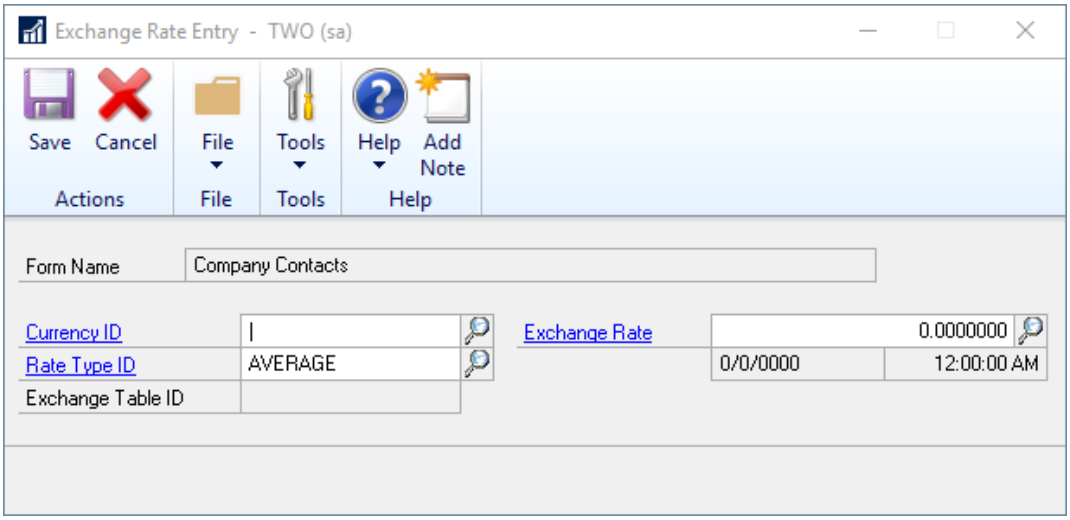


The currency view button is a drop down list that allows you to select to display the currency (and currency calculation) fields in the originating or functional currency.

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.

Extra Windows

This module will walk you through adding Extra Windows to an Extender Form.

Adding Extra Windows to a 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 3 types of Extra Windows, Standard, Note, and Note List. A Standard extra window allows you to define 15 additional data entry fields. 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. If you are using Extender Enterprise, an additional Extra Window type will be available

called Run Actions. The Run Action Window Type will allow you to add Extender Actions to the Extra Window button.

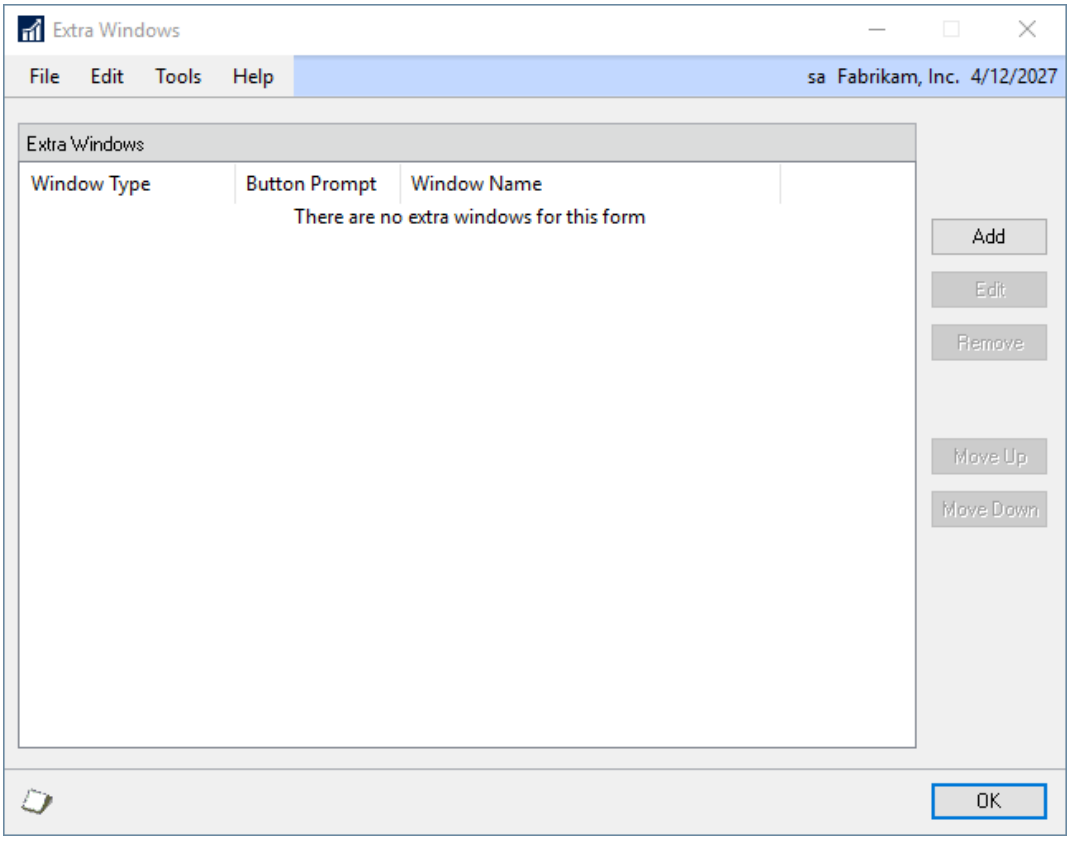
When an extra window is added to a Form, a button is added to the bottom of the Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the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



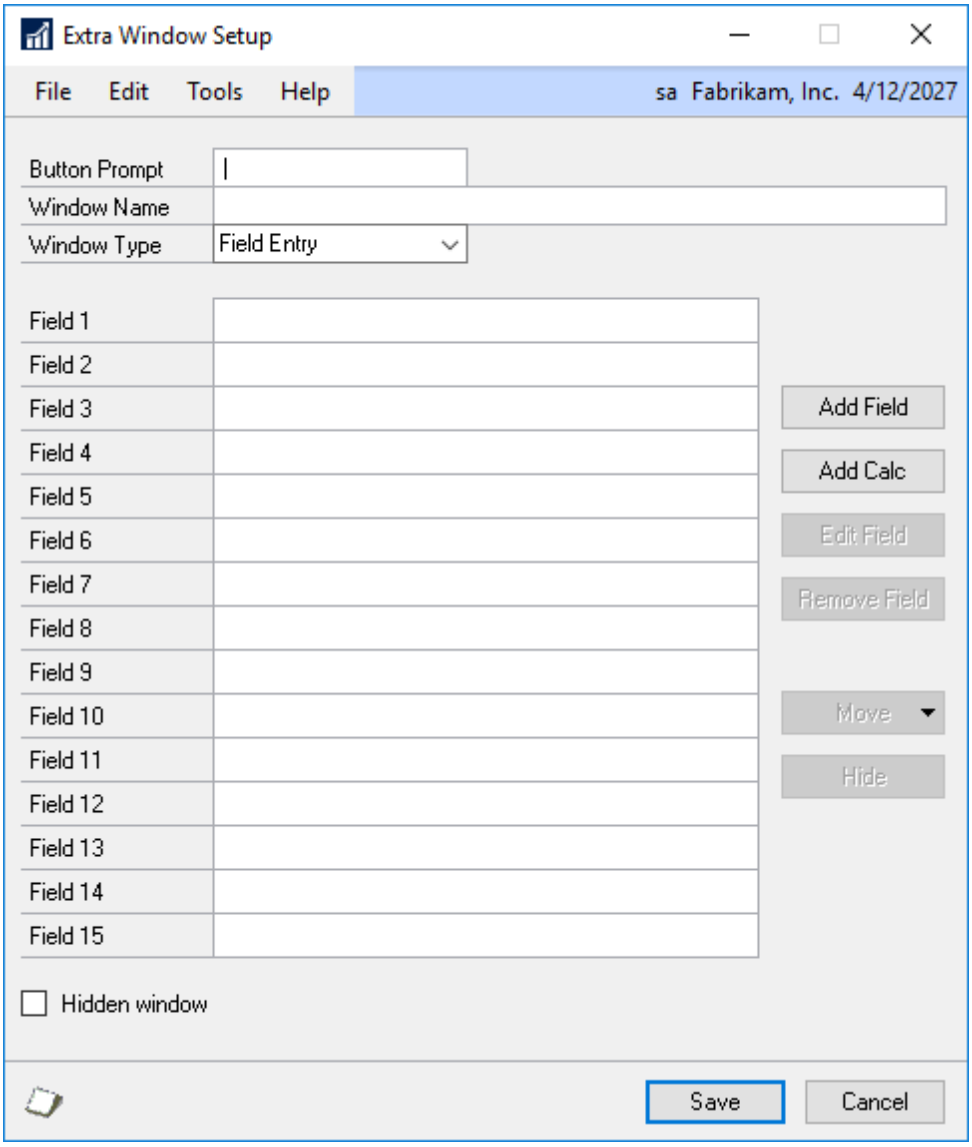
You can have a maximum of 50 extra windows on a Form. Only 8 of these windows are displayed on the main window. Other extra windows are accessible from the Extras menu.

To add an extra data entry window:

1. Click Extra Windows.



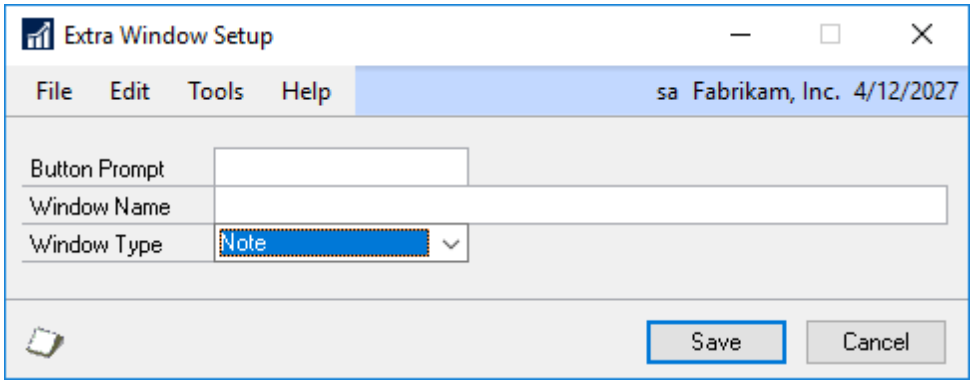
2. Click the Add button next to the Extra Windows list.



3. Enter a Button Prompt and Window Name.
4. Select Field Entry as the Window Type.
5. Enter prompts and select field types for fields 1 to 15.
6. Click Save.

To add a notes window:

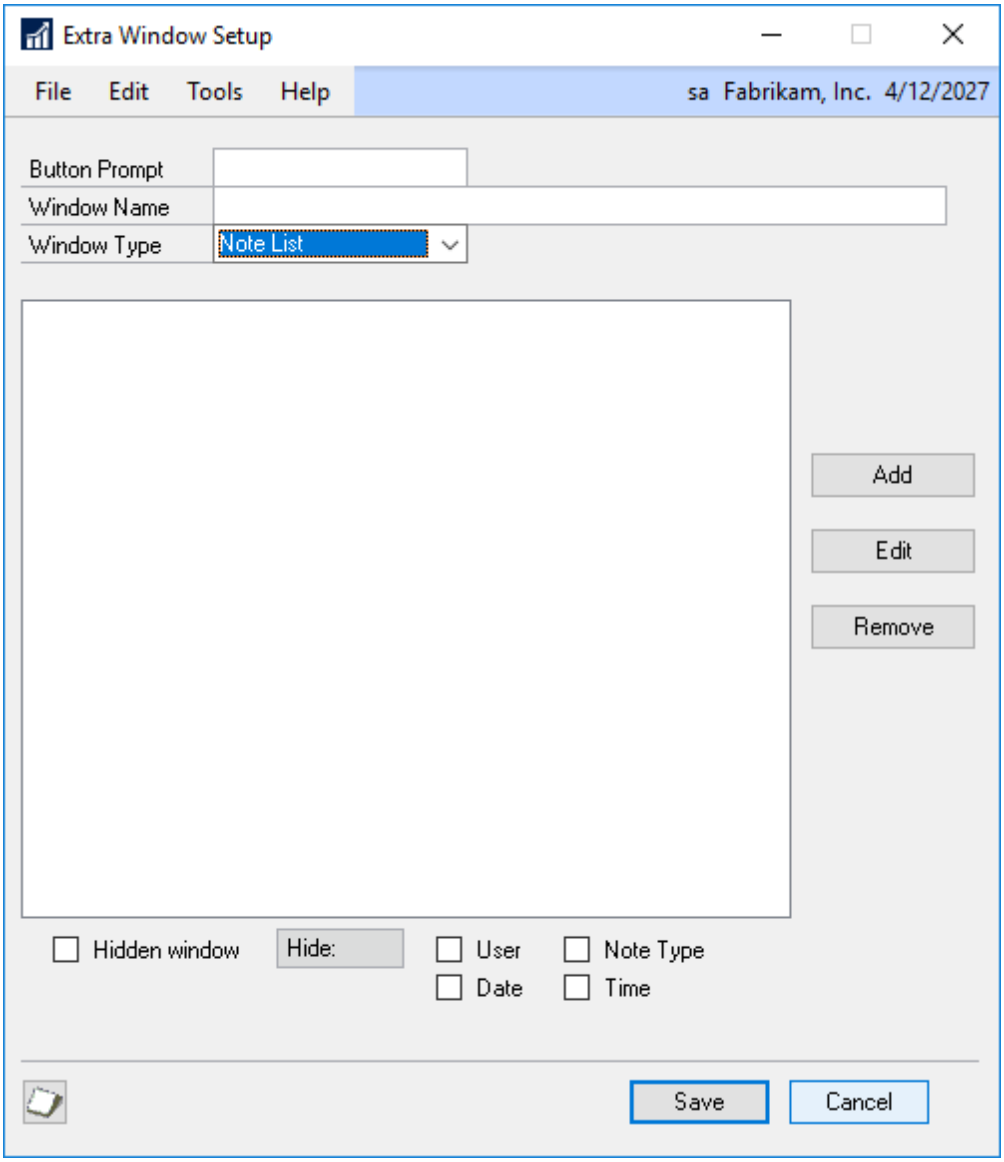
1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



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

To add a note list window:

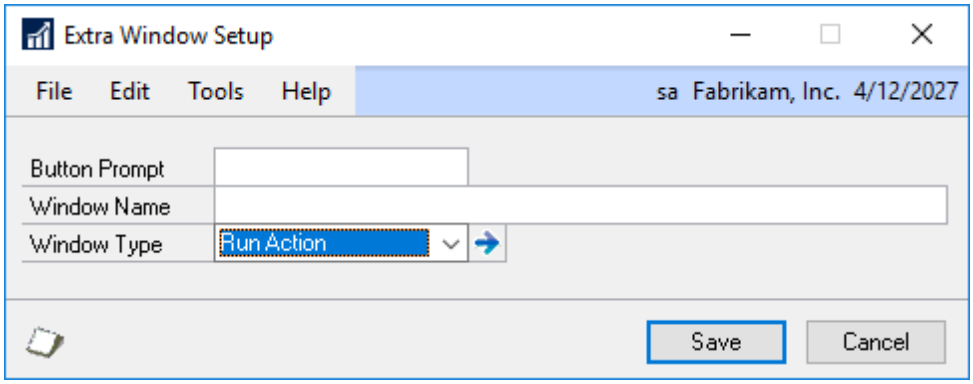
1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



3. Enter a Button Prompt and Window Name.
4. Select Note List as the Window Type.
5. Click Add to enter Note Types.
6. Click Save to save the Note Types.
7. Click Save.

To add an Run Action window (Enterprise Only):

1. Click Extra Windows.
2. Click the Add button next to the Extra Windows list.



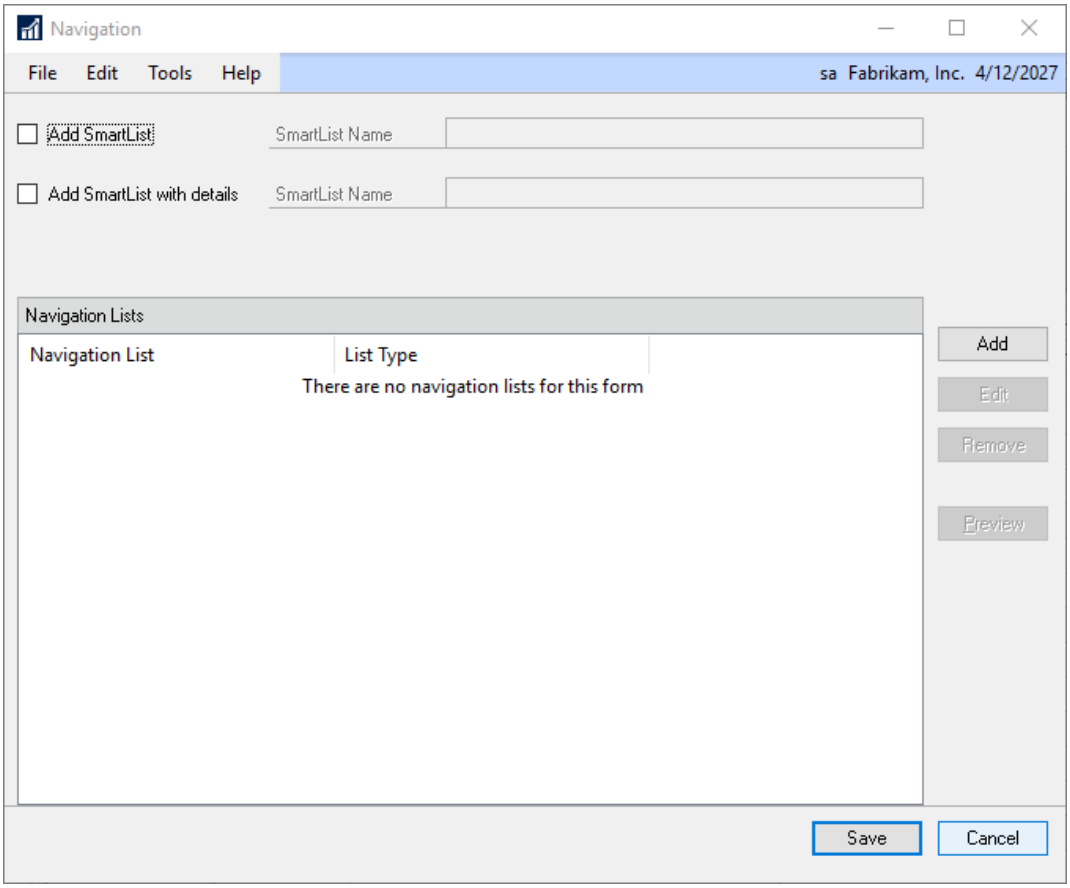
6. Enter a Button Prompt and Window Name.
7. Select Run Action as the Window Type.
8. Click the expansion arrow to add the action you would like the Extra Window to run.
9. Click Save.

SmartList

This module will walk you through adding the data from an Extender Form to SmartList. Use the Navigation window to create a new SmartList from the Form data. Extender Forms create a new SmartList to display the data. They cannot be linked to existing SmartLists.

To add the Form to SmartList:

1. Click Navigation.



2. Mark the Add SmartList option. This will create a SmartList with the Fields from the Extender Forms window.
3. Enter the SmartList Name if you want it to be something different than the default.
4. Select the Series that the SmartList should be created in.
5. If the Form has detail fields on it, you will have the Add SmartList with details option available as well to add a SmartList with the detail fields.
6. Click Save.

Templates

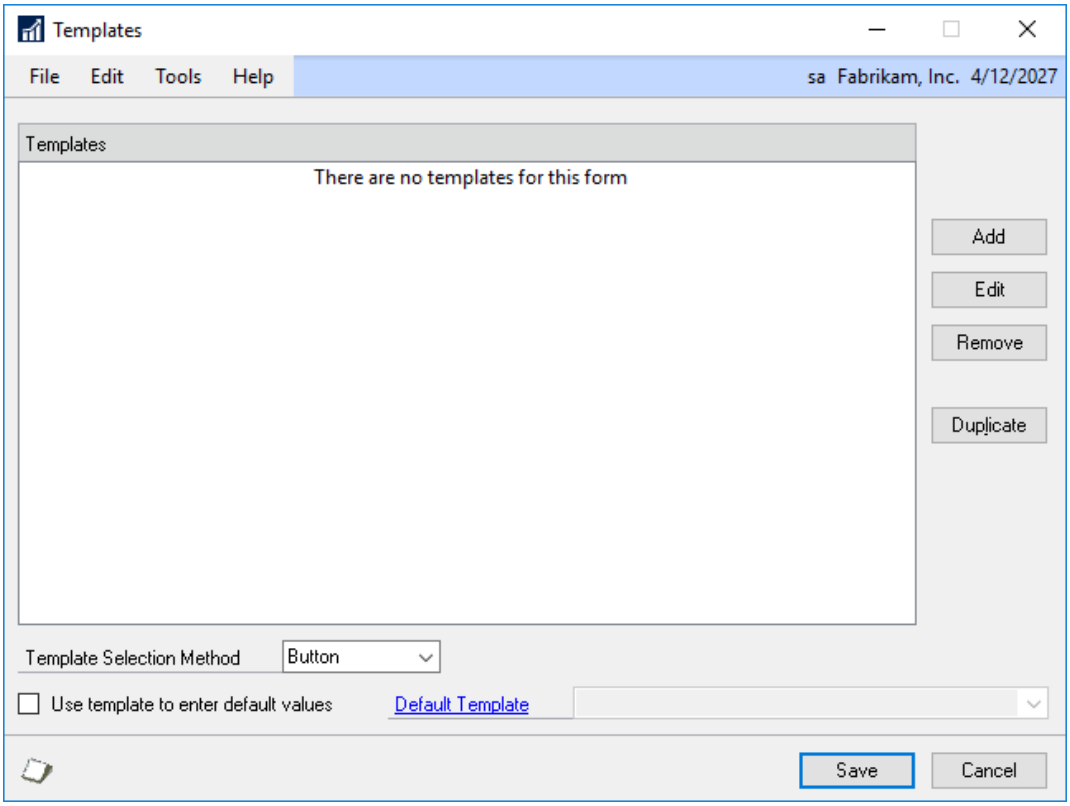
This module will walk you through adding Templates to an Extender Form. A Form template is a set of default values for fields on the Window. They can be used to enter data more quickly by automatically assigning values.

Creating Form Templates

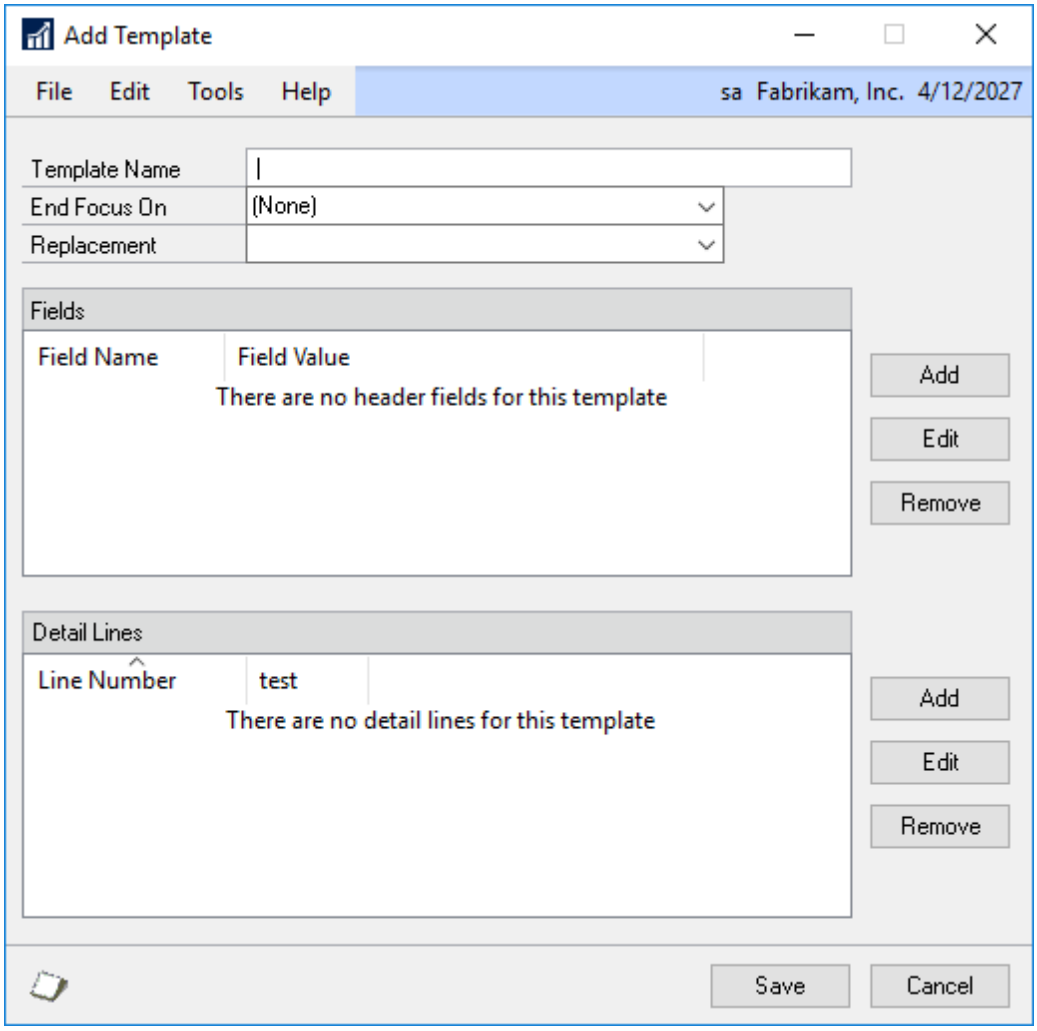
Use the Templates window to add new Form templates.

To create a template:

1. Click Templates.



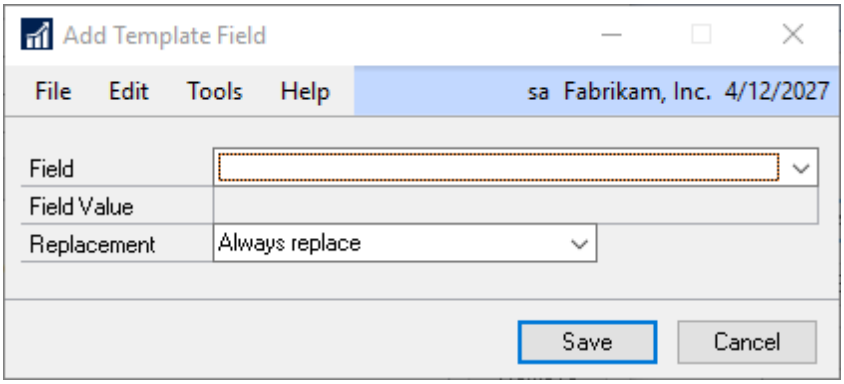
2. Click the Add button to the right of the Templates list.



3. Enter a Template Name 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 the Add button to the right of the Fields list.



2. Select the field that you want to default.
3. Select the Field Value.
4. Select the Replacement option.

If you select to Always Replace then any existing values in these fields will be replaced by the template values. If you select to replace when empty, then only the fields without current values will be updated by the template.

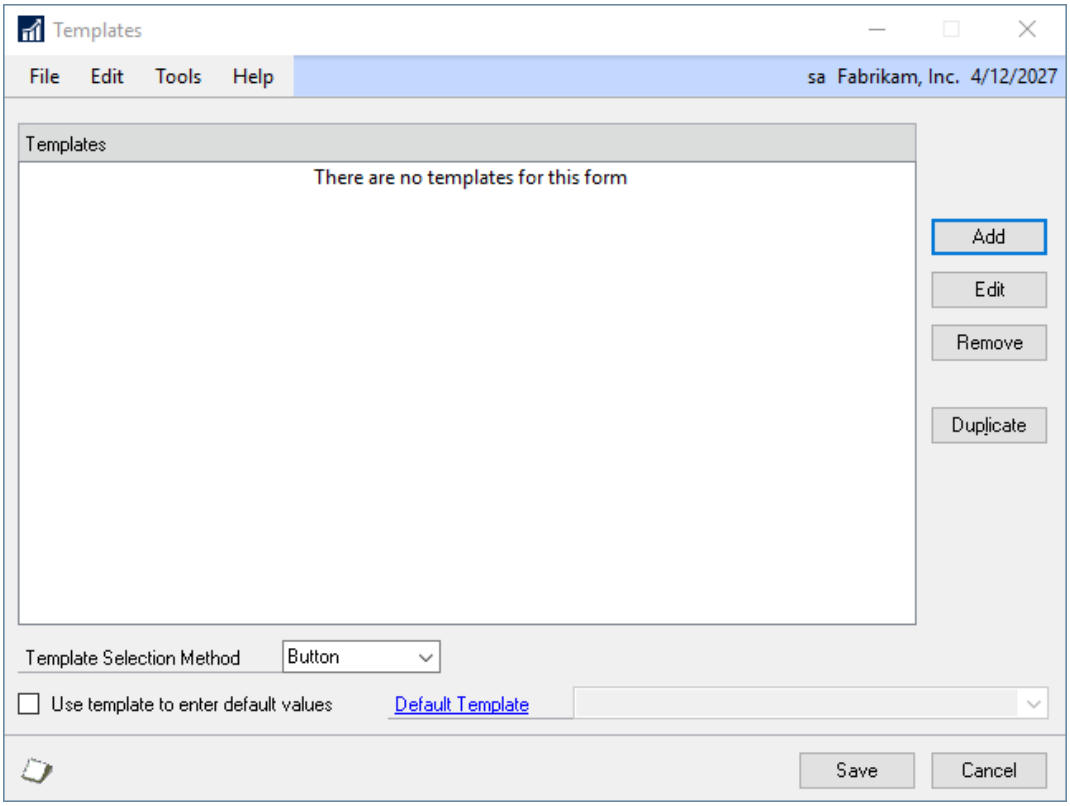
5. Click Save.

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 Templates.



2. Select the Template Selection Method.
3. Check the Use template to enter default values checkbox and select the Default Template.
4. Click Save.

Using Form Templates

How you use templates depends on the template Selection Method. There are three 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 open 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 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 window.

Navigation Lists (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

Adding a New Navigation List (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

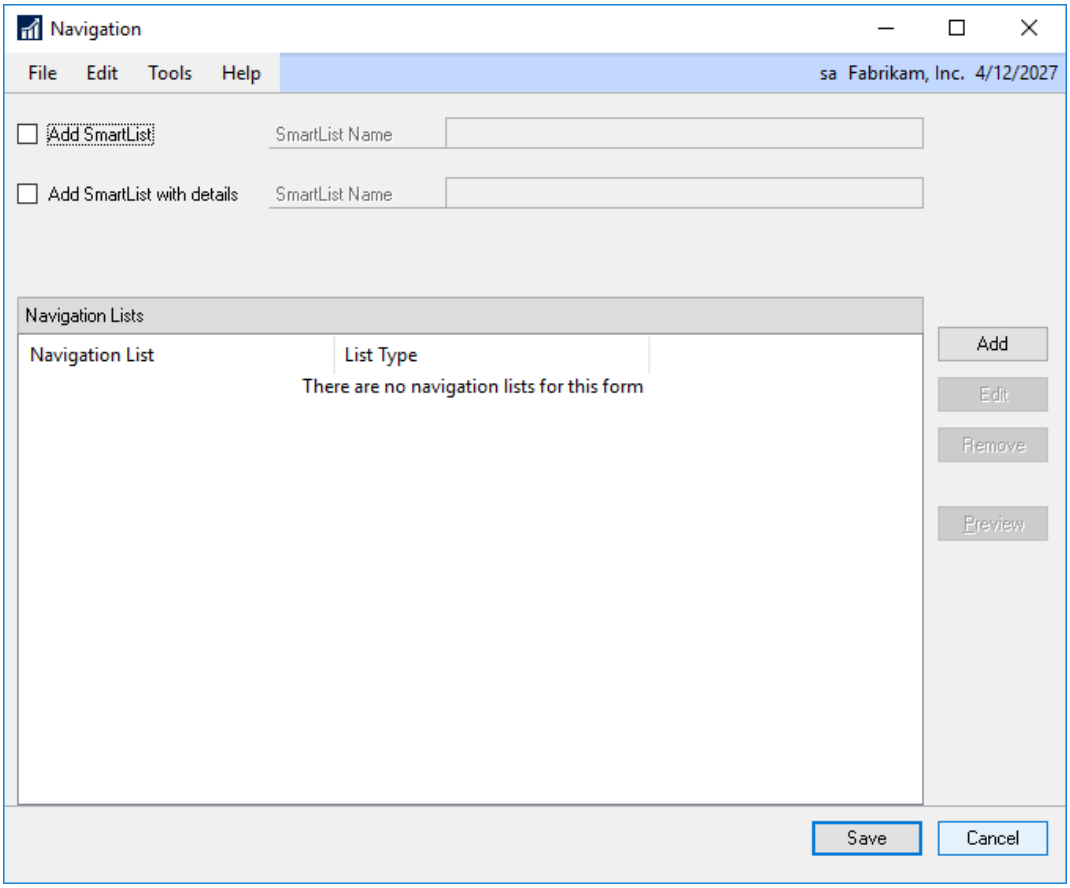
Use the Extender Navigation Lists window to define new Navigation Lists.

There are 4 types of eXtender Navigation List:

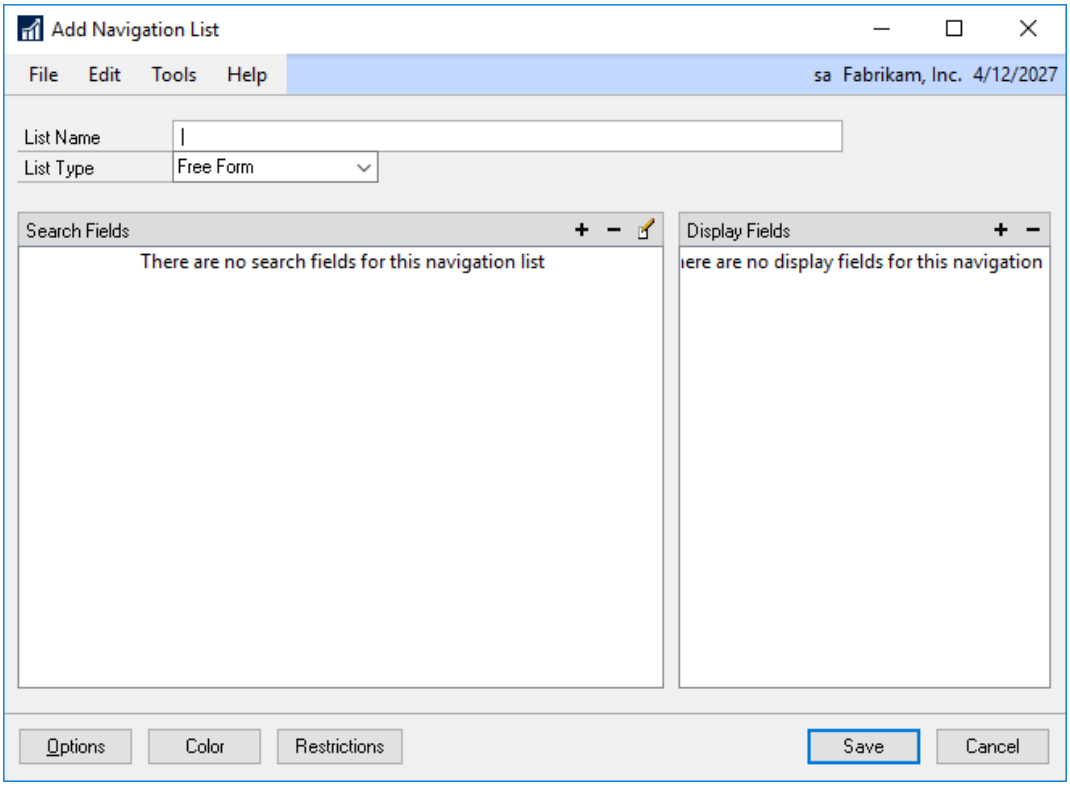
- Free Form - provides a search engine style interface
- Calendar - provides a calendar style interface where users can select a date and a second search parameter to restrict the records shown
- Combination - allows up to 8 parameters that can be selected to restrict the records shown
- List Values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

To add a new Navigation List:

1. Click on the Navigation button on the Extender Forms setup window.



2. Click the Add button to the right of the Navigation Lists

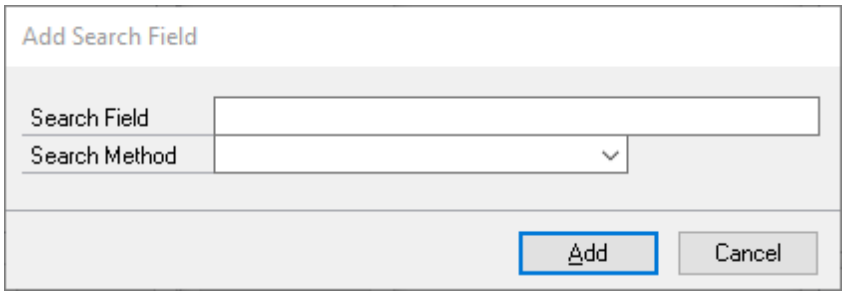


3. Enter a name for the list.
4. Select the List Type.
5. Select Search Fields.
6. Select Display Fields.
7. Click on the Save button.

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, only originating currency fields can be selected as search fields.

To preview a Navigation List:

1. Click on the Navigation button on the Extender Forms setup window.
2. Select the Navigation list to view
3. Click the Preview button to the right of the Navigation List list.



Once a Navigation List setup complete, it would need to be added to a menu for end users to access it.

Using Free Form Navigation Lists (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

To find a record using a Free Form Navigation List:

1. Click on the Navigation List from the menu it was added to.
2. 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 (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

To find a record using a Calendar Navigation List:

1. Click on the Navigation List from the menu it was added to.
2. Select the date from the calendar that you want to restrict on. Use the Previous and Next buttons to move between months.
3. Select the secondary restriction method using the field list below the calendar.
4. 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 (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

To find a record using a Combination Navigation List:

1. Click on the Navigation List from the menu it was added to.
2. Enter values for each field that you want to restrict.
3. Click Find Now to execute the search.
4. Click Clear to restart the combination list.

Using List Values Navigation Lists (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

To find a record using a List Values Navigation List:

1. Click on the Navigation List from the menu it was added to.
2. Select a restriction method.
3. Select a restriction value.
4. You can export to currently displayed values to Excel by clicking on the Excel button.

Modifying an Existing Navigation List (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To modify an existing Navigation List:

1. Click on the Navigation button on the Extender Forms setup window.
2. Select the Navigation List to modify.
3. Click the Edit button to the right of the Navigation Lists.
4. Enter the new information for the Navigation List.
5. Click on the Save button.

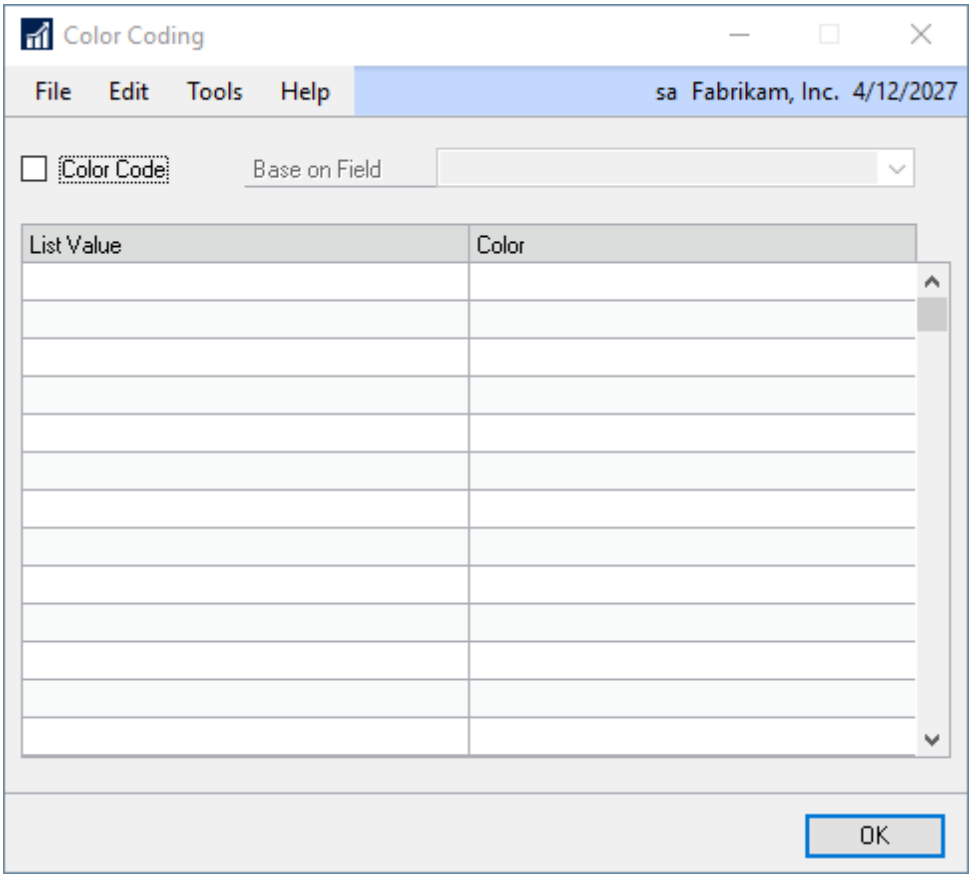
Setting Color Coding Options (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

Use the Color Coding window to assign colors to records based on a field in the Extender Resource.

To set color coding options on the Navigation List:

1. Click 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 the OK button.

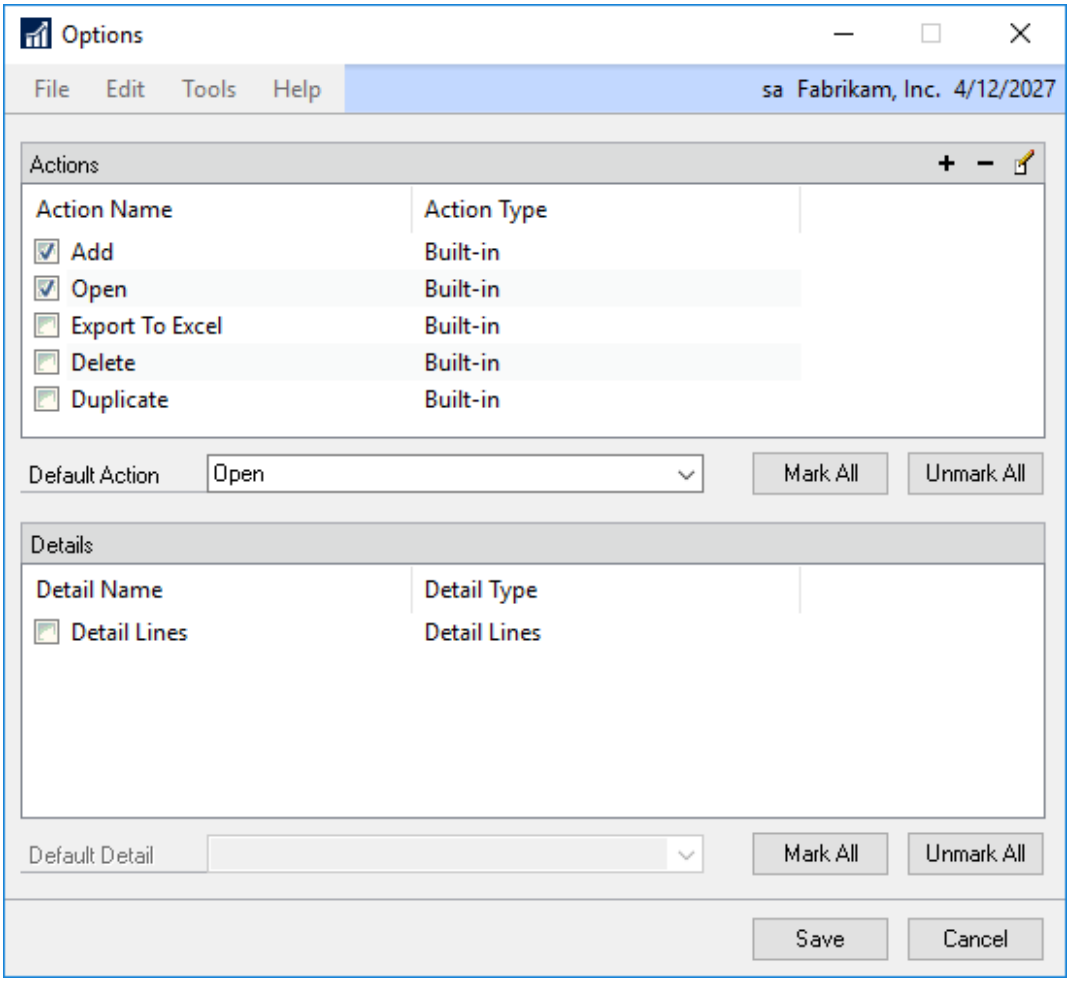
Setting Options (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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 the Options button.



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

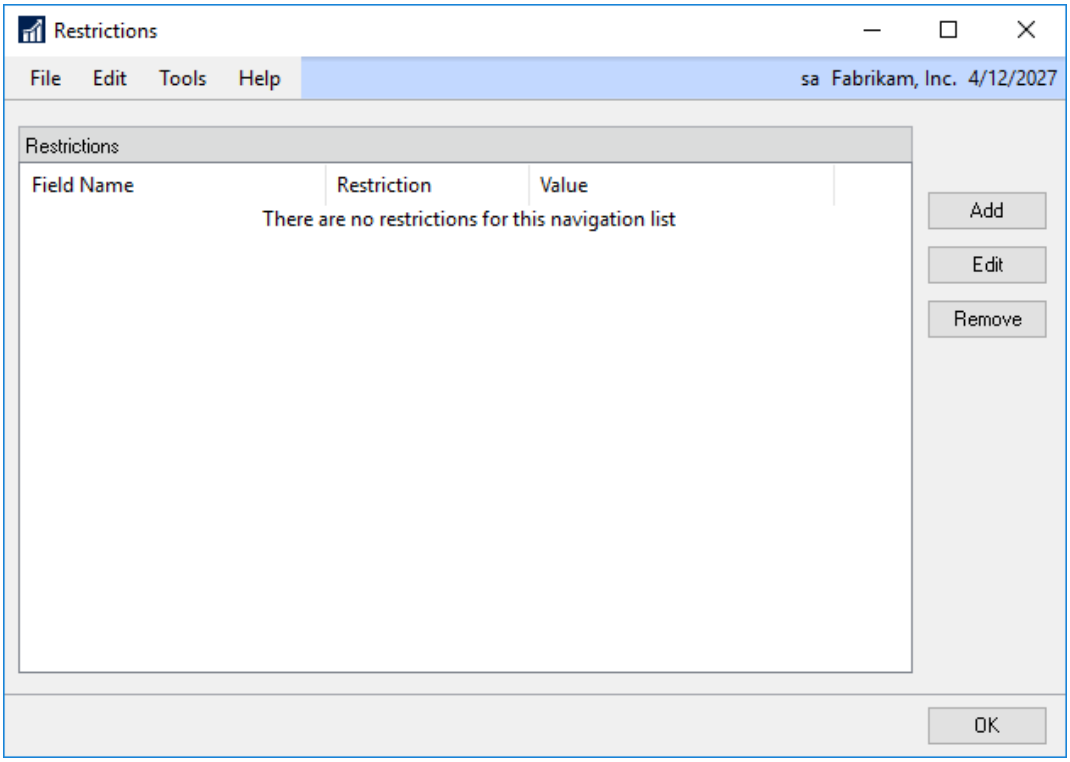
Adding Restrictions (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

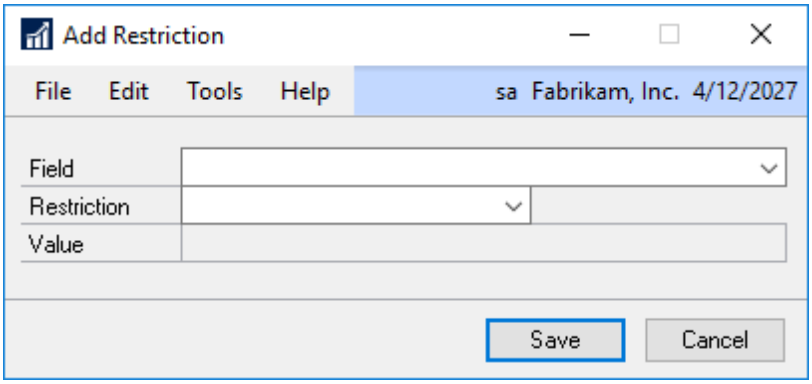
Use the Restrictions window to add fixed restrictions to the Navigation List.

To add restrictions:

1. Click the Restrictions button.



2. Click on the Add button to the right of 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 and OK button.

To modify existing restrictions:

1. Click the Restrictions button.
2. Click on the Edit button to the right of the Restrictions list.
3. Enter the new information for the restriction.
4. Click on the Save button and OK button.

To remove existing restrictions:

1. Click the Restrictions button.
2. Click on the Remove button to the right of the Restrictions list.

Removing Navigation Lists (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To remove a Navigation List:

1. Click the Navigation button.
2. Select the Navigation List to remove.
3. Click the Remove button next to the Navigation Lists list.

Actions

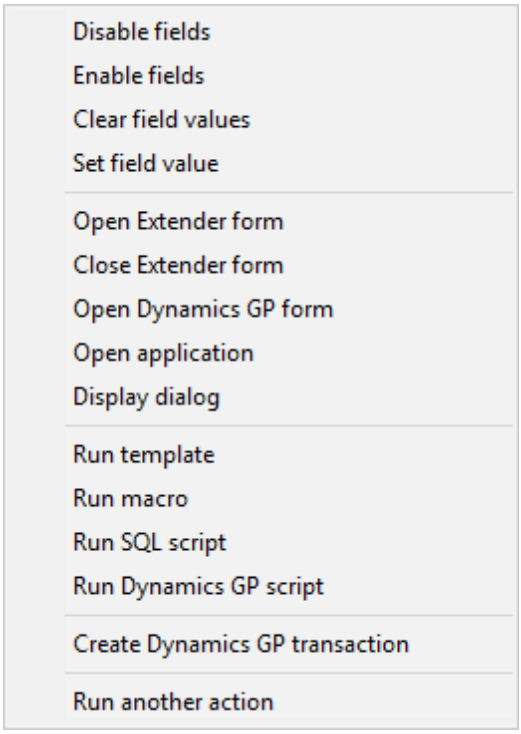
This module will walk you through adding Actions to an Extender Form.

Actions

Extender Actions allow a window to perform specific actions based on user input. There are fifteen actions that can be performed.



Extender Standard

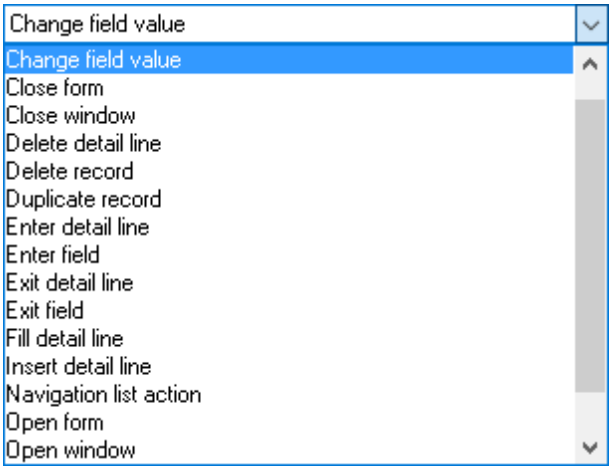


Extender Enterprise

- Disable Field: will disable the selected Extender field. This will allow data to be displayed, but not entered or changed
- Enable Fields: can be used to enable fields that were previously disabled using the Disable Field Action. When a field is enabled, the data in it can be added or changed
- Clear field values: can be used to clear the value entered in field
- Set field value: can be used to enter a specific value into a field
- Open Extender form (Enterprise Only): can be used to open an Extender form
- Close Extender form (Enterprise Only): can be used to close an Extender form
- Open Dynamics GP form (Enterprise Only): can be used to
- Open application (Enterprise Only): will run an external application
- Display dialog (Enterprise Only): can be used to display an Extender Dialog
- Run Template: can be used to run a specific Window Template when the action is triggered. The templates need to be exist before they can be selected using an Action
- Run macro (Enterprise Only): will run a recorded Microsoft Dynamics GP macro
- Run SQL script (Enterprise Only): can be used to run a SQL script
- Run Dynamics GP script (Enterprise Only): can be used to run a Dexterity script
- Create Dynamics GP Transaction (Enterprise Only): will create a Dynamics GP transaction based on Extender data

- Run Another Action (Enterprise Only): will call another Run Dynamics GP script action that is already setup

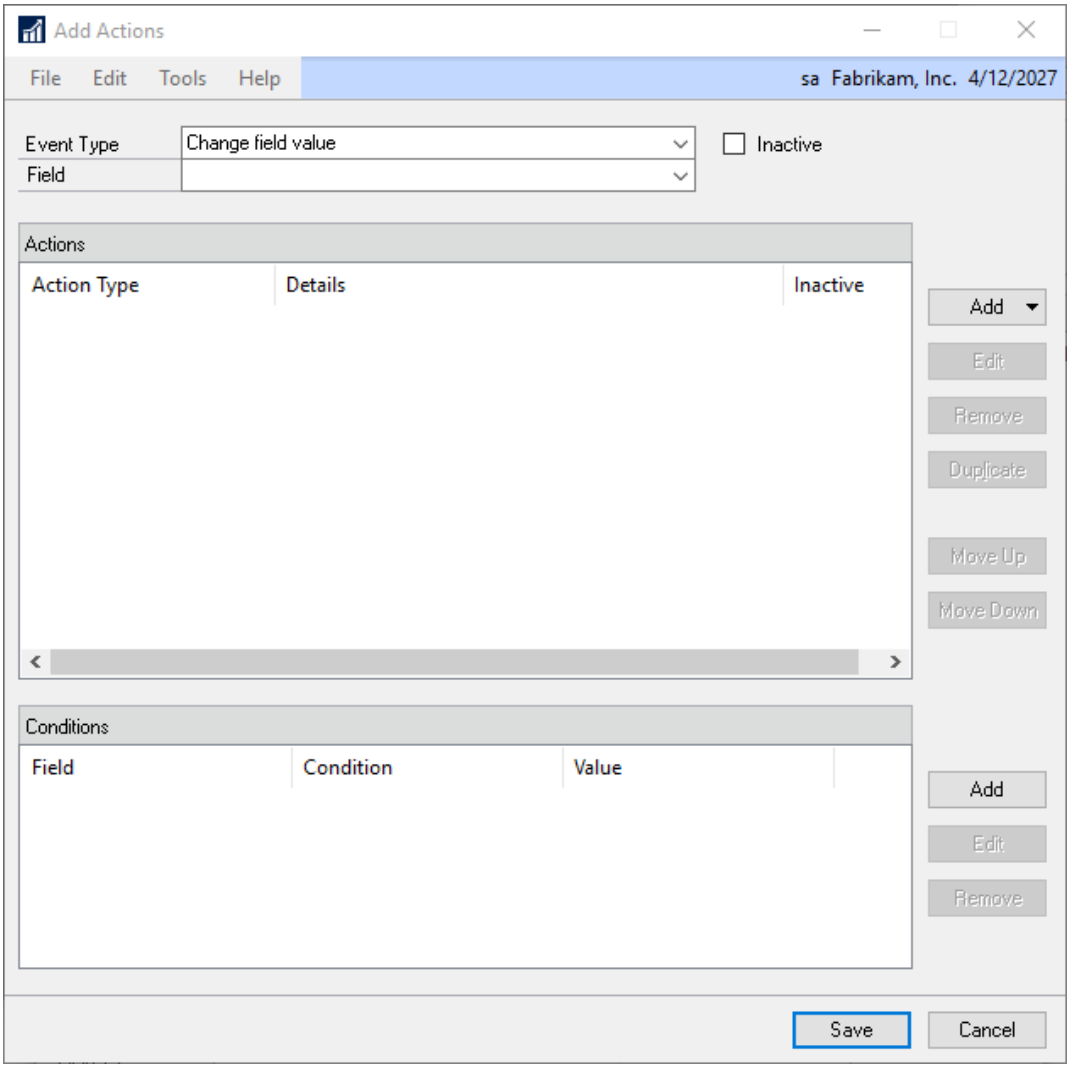
There are three events with Extender Standard and twelve events with Extender Enterprise in an Extender Form that Actions can be added to. An event is an action that occurs within your Extender application. You can use events to trigger new functionality in your application. When you open the Actions window, all events for the Extender resource are displayed. Conditions can also be added to conditionally perform any of the above actions.



- Change Field Value: triggers when the specified field has been changed in an Extender Window. The action runs after focus has been lost from the selected field.
- Close Form (Enterprise Only): triggers when the form is closed
- Close Window (Enterprise Only): triggers when the extra window is closed
- Delete Record (Enterprise Only): triggers when an existing record is deleted
- Duplicate Record (Enterprise Only): triggers when an existing record is duplicated
- Enter Field: triggers whenever a specific field receives focus in an Extender Window.
- Exit Field: triggers whenever a specific field loses focus in an Extender Window
- Navigation List Action (Enterprise Only): triggers from a Navigation List
- Open Form (Enterprise Only): triggers when the form is opened
- Open Window (Enterprise Only): triggers when the extra window is opened
- Print Report (Enterprise Only): triggers when the Print button is clicked or Print is selected from the File menu
- Save Record (Enterprise Only): triggers when a new record is created or an existing record is updated

To add an Extender Action to a Form

1. Open the Extender Forms window and select the Form that you want to add an action to.
2. Click the Actions button to open the Add Actions window.



3. Select the Event Type from the Event Type drop down list.
4. Select the Field you want to trigger the event in the Field drop down list if available for the Event Type selected.
5. Click on the Add button in the Add Actions window.
6. Select your Action Type from the drop down list.

To modify an existing action type:

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

To duplicate an existing action type:

1. Select the action type that you want to duplicate from the Actions list.
2. Click on the Duplicate button next to the Actions list.

To inactivate an existing action type:

1. Select the action type that you want to inactivate from the Actions list.
2. If you want to inactivate the action as a whole, mark the Inactive checkbox at the top of the Extender Actions window.
3. If you want to inactivate a specific action in the main action, highlight the specific action and then click the Edit button. Mark the inactive icon and save the action.
4. Save the main action.

If you no longer want an action type on an action, it can be removed.

To remove an existing action type:

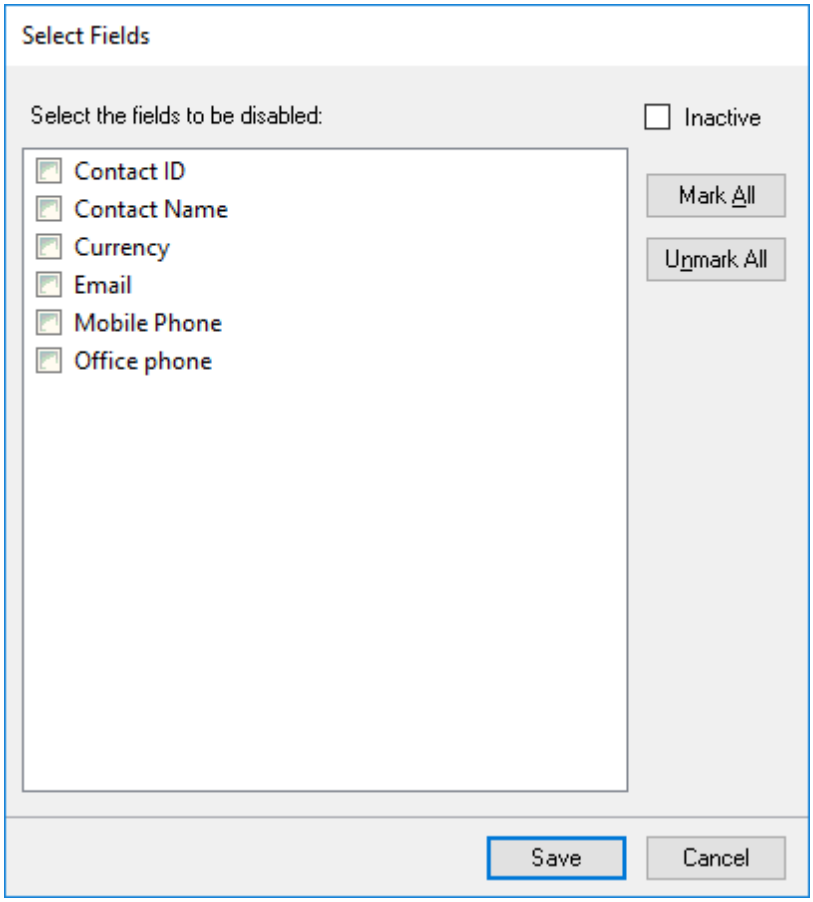
1. Select the action type that you want to remove from the Actions list.
2. Click on the Remove button next to the Actions list.

Disable Fields

A Disable Fields action type 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 action type:

1. Select the event from the Events list that you want to add a Disable Fields action type to
2. Click on the Add button next to the Actions list and select Disable Fields from the drop-down list



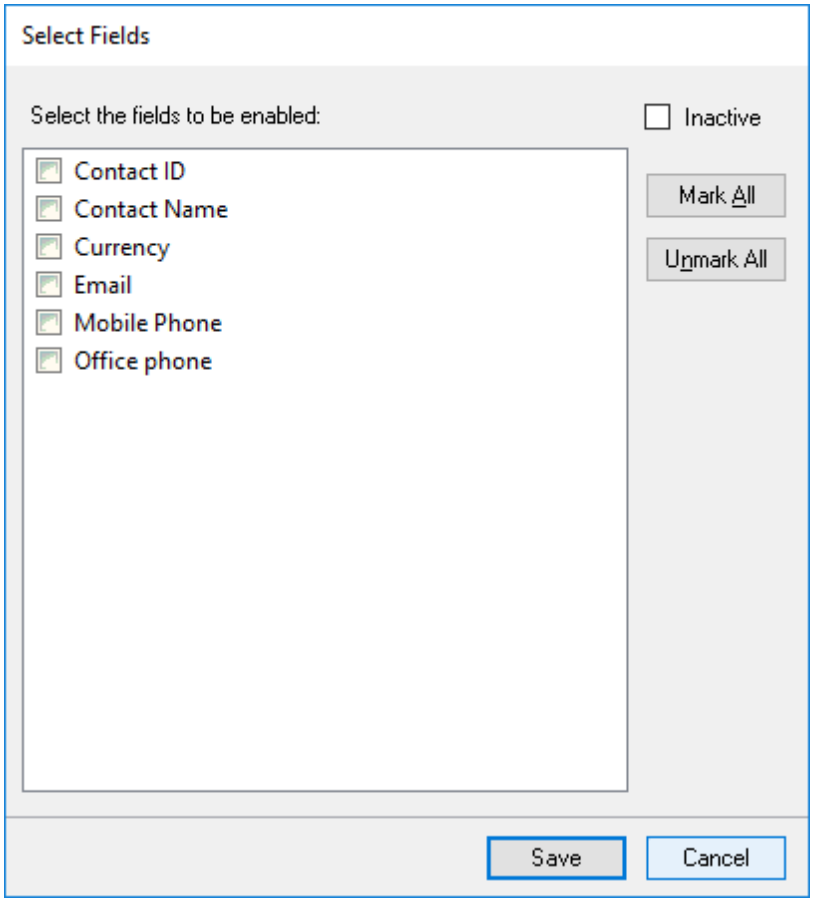
3. Mark the fields that you want to disable.
4. Click on the Save button.

Enable Fields

An Enable Fields action type enables a number of fields on the Extender resource. Fields on extra windows are only enabled if the form is open.

To add an Enable Fields action type:

1. Select the event from the Events list that you want to add an Enable Fields action type to
2. Click on the Add button next to the Actions list and select Enable Fields from the drop-down list



3. Mark the fields that you want to enable.
4. Click on the Save button.

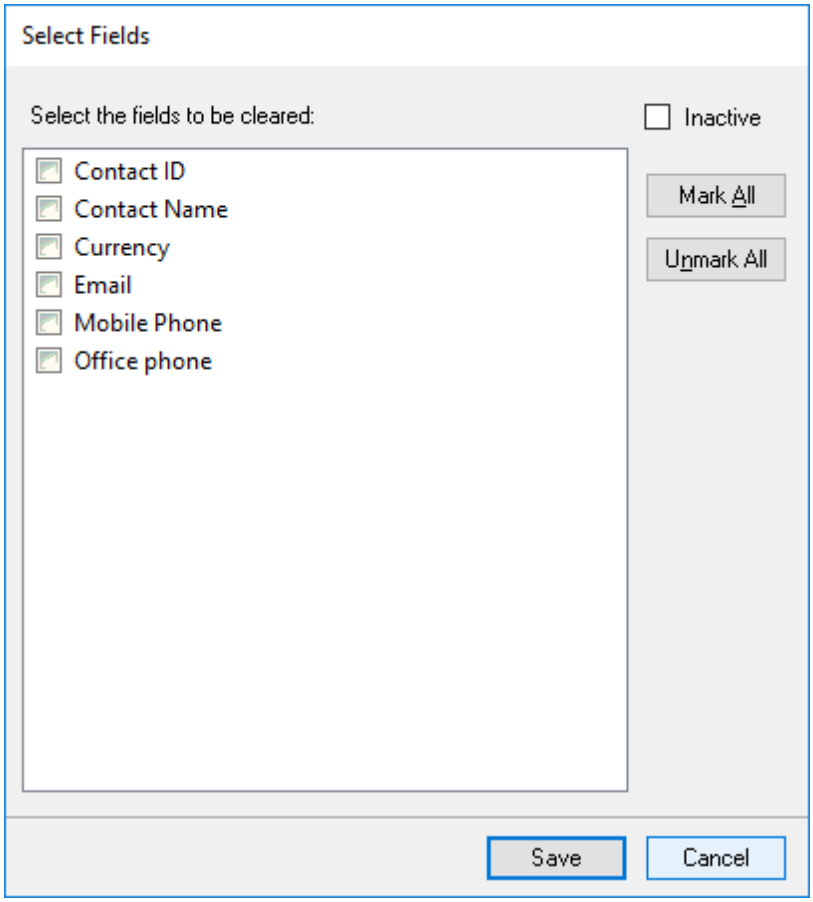
Clear Field Values (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Clear Values action type clears a number of fields on the Extender resource. Fields on extra window are cleared regardless of whether the extra window is open.

To add a Clear Values action type:

1. Select the event from the Events list that you want to add a Clear Values action type to
2. Click on the Add button next to the Actions list and select Clear Values from the drop-down list



3. Mark the fields that you want to clear.
4. Click on the Save button.

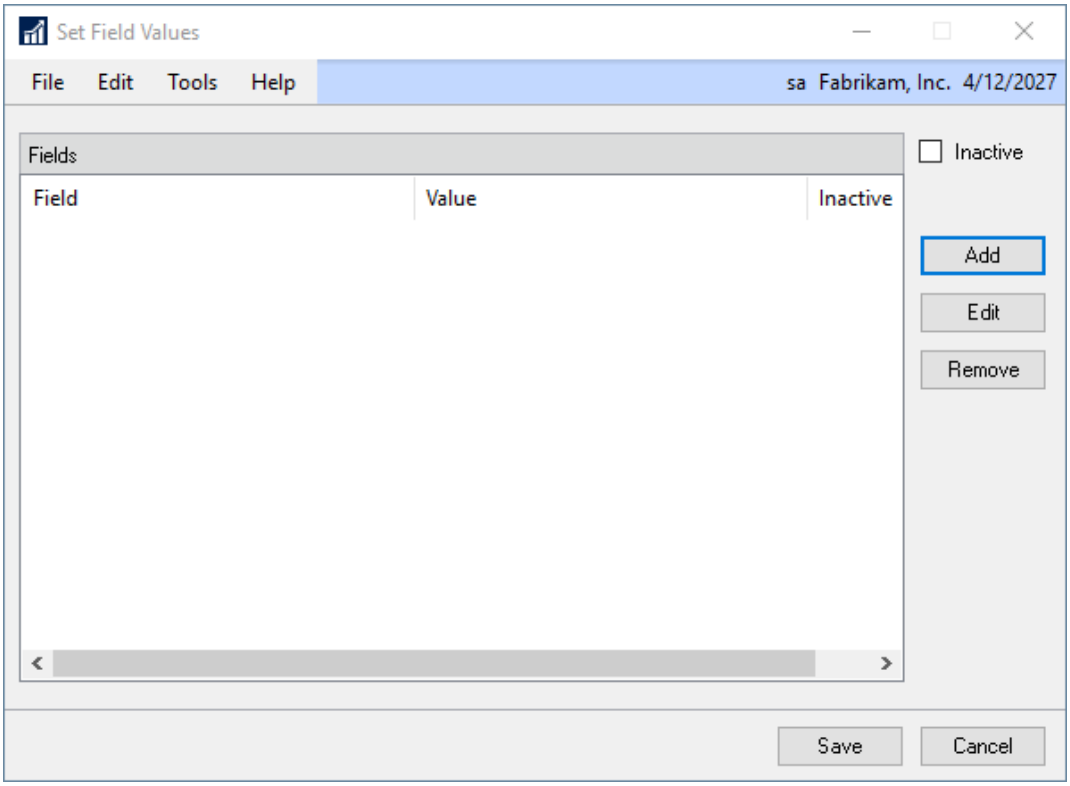
Set Field Values (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

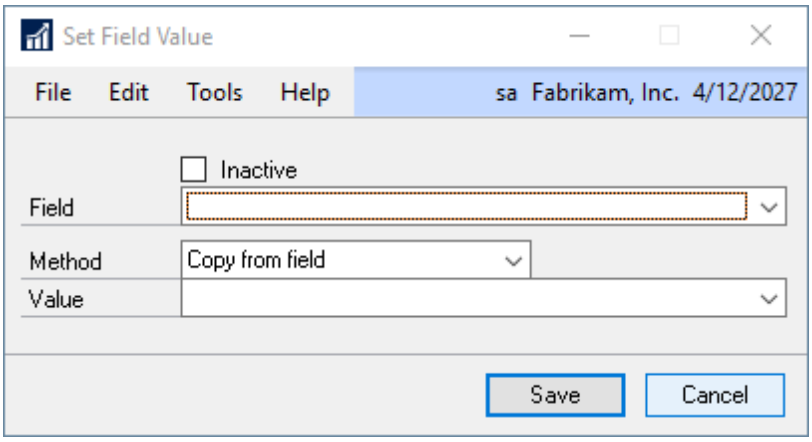
A Set Value action type sets the value of a single field on the Extender resource. You can always set the value or only set the value when the field is empty.

To add a Set Value action type:

1. Select the event from the Events list that you want to add a Set Value action type to
2. Click on the Add button next to the Actions list and select Set Field Value from the drop-down list



3. Select Add to add a field to set the value for.



4. Select the field that you want to set the value of.
5. Select the method to use to set the value.
6. Enter the value that you want to set the field to.
7. Click on the Save button.

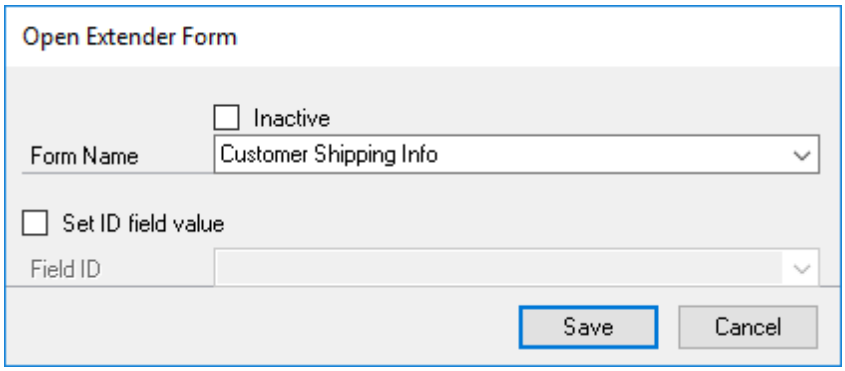
Open Extender Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

An Open Extender Form action type opens an Extender Form.

To add an Open Extender Form action type:

1. Select the event from the Events list that you want to add an Open Extender Form action type to
2. Click on the Add button next to the Actions list and select Open Extender Form from the drop-down list.



3. Select the Form that you want to open.
4. If you want data to populate in the form ID when it is opened based on a field on the form, mark the Set ID field value checkbox and select the field from the form to populate the Field ID. If the form has a secondary ID on it, select the Secondary ID as well.

Close Extender Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Close Extender Form action type closes the current Extender Form.

To add a Close Extender Form action type:

1. Select the event from the Events list that you want to add a Close Extender Form action type to
2. Click on the Add button next to the Actions list and select Close Extender Form from the drop-down list. It will automatically create the action.

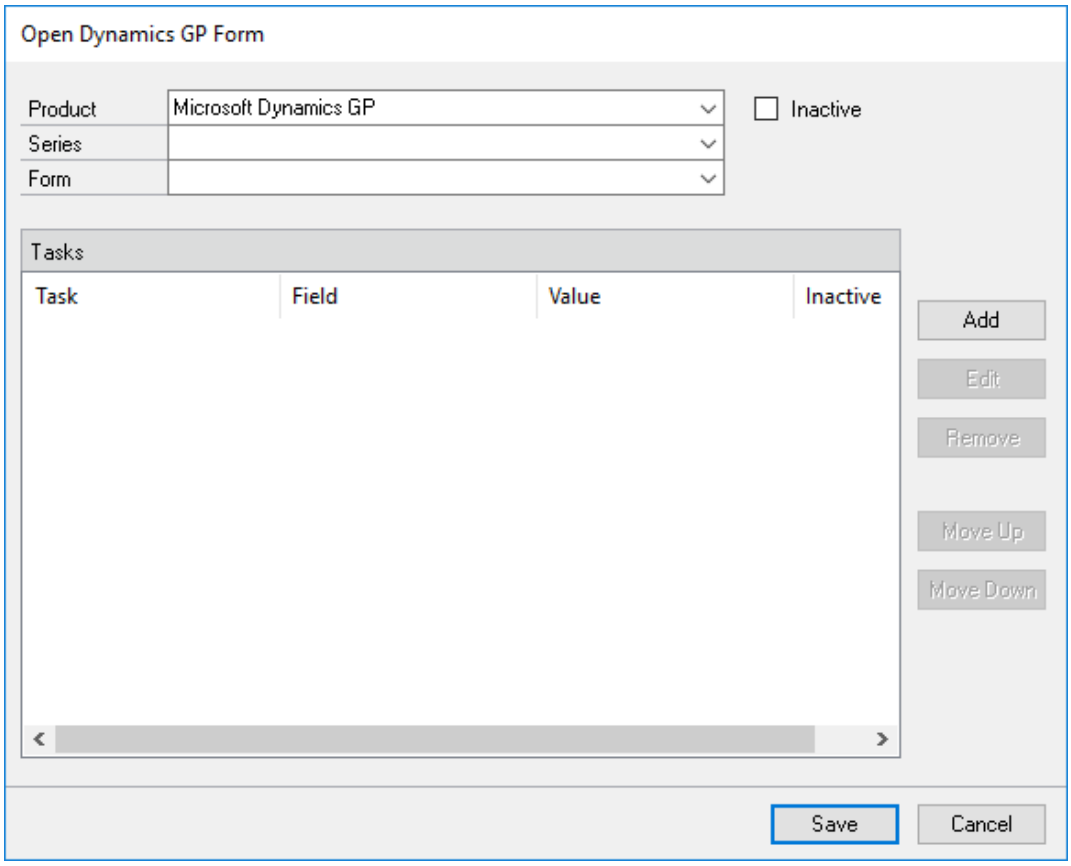
Open Dynamics GP Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

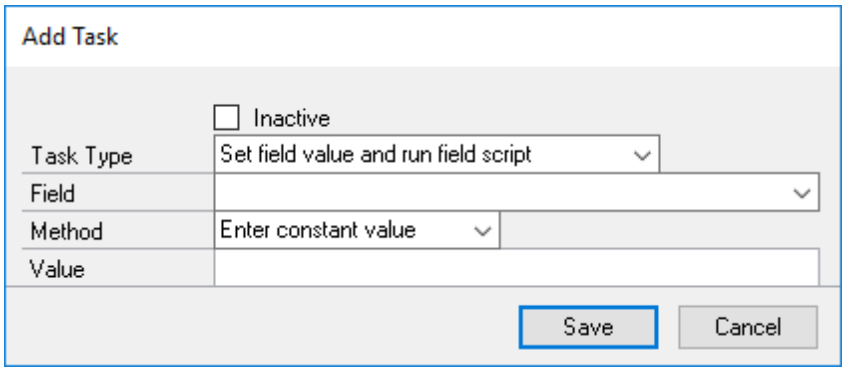
An Open Dynamics GP Form action type opens a Dynamics GP Window when run. You can open the form for a new record or pass data to the form.

To add an Open Dynamics GP Form action type:

1. Select the event from the Events list that you want to add a Set Value action type to
2. Click on the Add button next to the Actions list and select Open Dynamics GP Form from the drop-down list



3. Select the Product, Series, and Form for the Dynamics GP form to be opened.
4. To add a task to pass data to the window, click Add.



5. Select the Task type to use to pass the data to the window
6. Select the Field to pass data to, the Method to populate it, and the value to use.
7. Click on the Save button.

8. If additional Tasks need to be added, repeat steps 4-7.
9. Click Save.

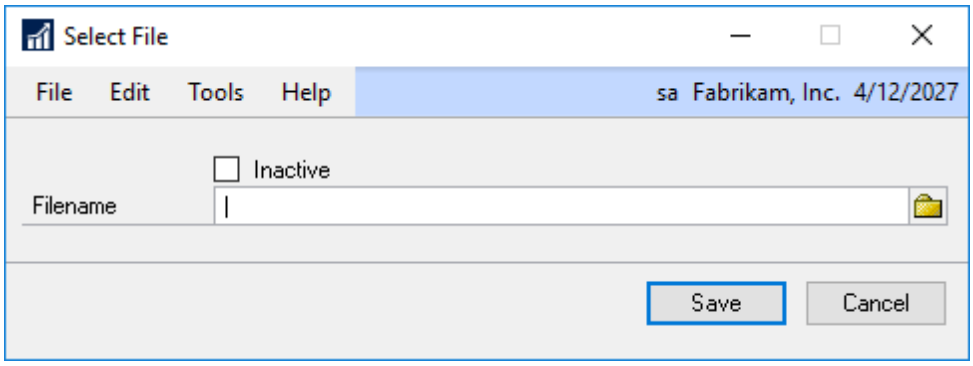
Open Application (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add an Open Application action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Open Application from the drop-down list



3. Enter the filename of the application that you want to run.
4. Click on the Save button.

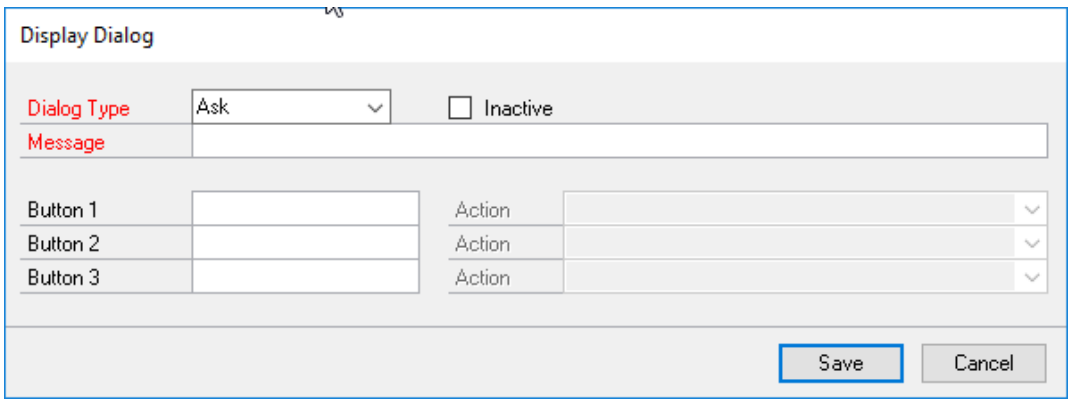
Display Dialog (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Display Dialog action type presents the end user with a message window. The window can display a message, ask a question, or request input.

To add a Display Dialog action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Display Dialog from the drop-down list



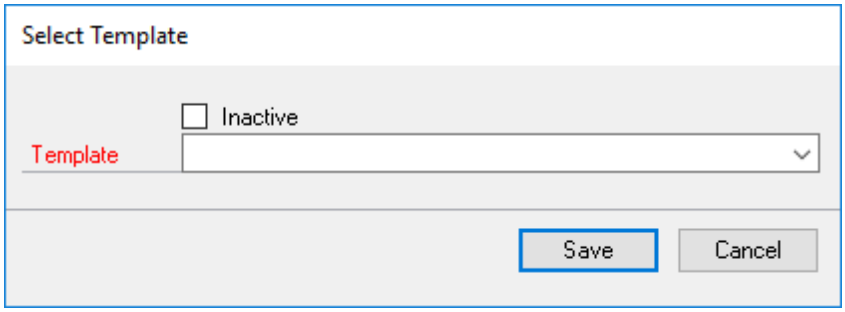
3. Select the Dialog Type.
4. If the Dialog Type is Ask, enter a question and values for the answer buttons. Actions can also be added for each button.
5. If the Dialog Type is Input, enter a question.
6. If the Dialog Type is Message, enter a Message to display.
7. Click on the Save button.

Run Template

A Run Template action type applies a template from the Extender resource. This action type is only displayed if there are Extender resources added to the Extender resource.

To add a Run Template action type:

1. Select the event from the Events list that you want to add an Apply Templates action type to
2. Click on the Add button next to the Actions list and select Run Template from the drop-down list



3. Select the Template that you want to apply.
4. Click on the Save button.

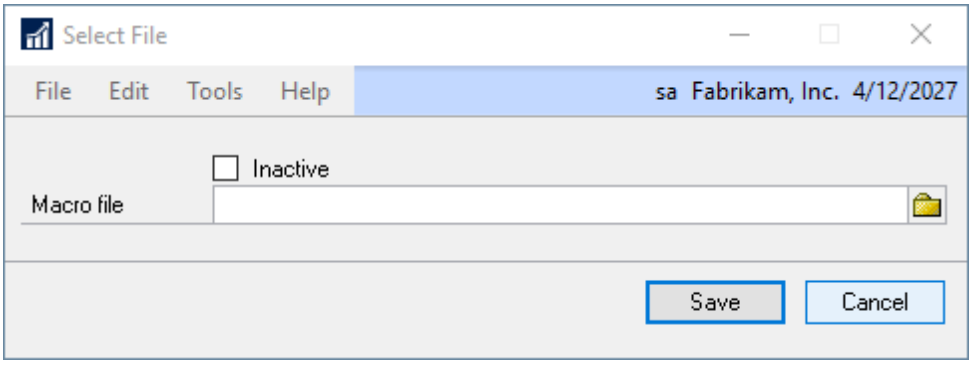
Run Macro (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Run Macro action type runs a Microsoft Dynamics GP macro.

To add a Run Macro action type:

1. Select the event from the Events list that you want to add a Run Macro task to
2. Click on the Add button next to the Actions list and select Run Macro from the drop-down list



3. Enter the filename of the macro that you want to run.
4. Click on the Save button.

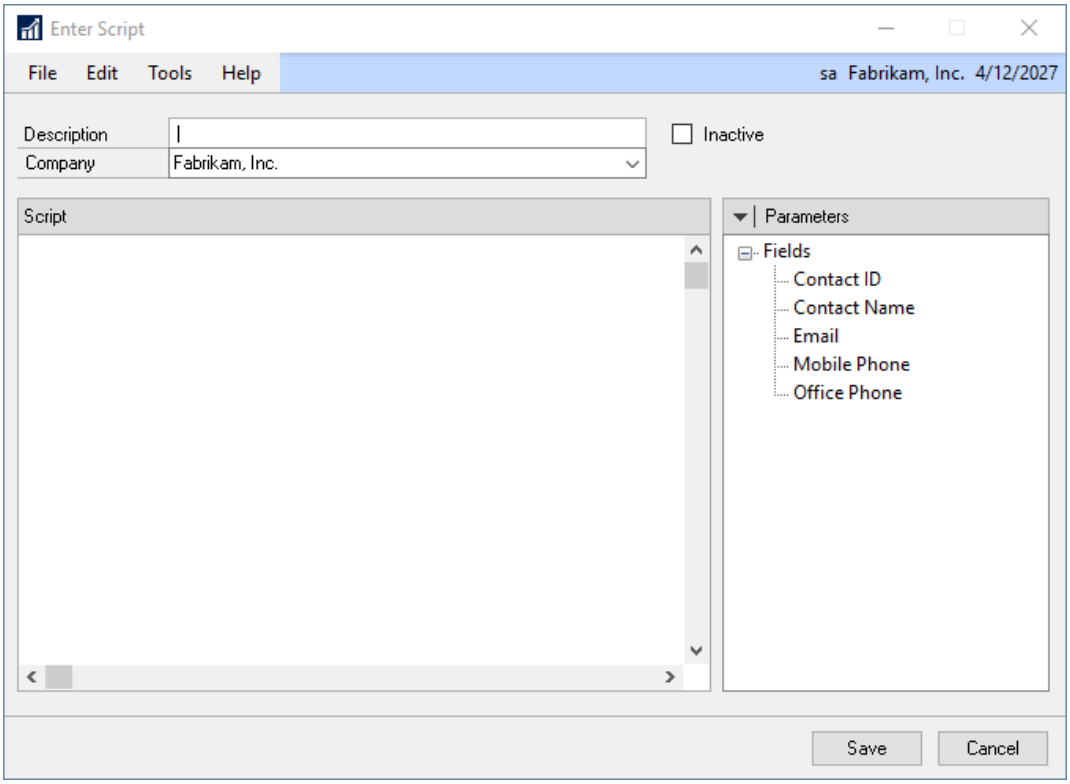
Run SQL Script (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add a Run SQL Script action type:

1. Select the event from the Events list that you want to add a Run SQL task to
2. Click on the Add button next to the Actions list and select Run SQL Script from the drop-down list



3. Enter a Description for the action type.
4. Select the Company that you want run the SQL script in. This can be a Microsoft Dynamics GP company or the system database.
5. Enter the SQL script that you want to run. Parameters and Tables can be selected from the list on the right.
6. Click on the Save button.

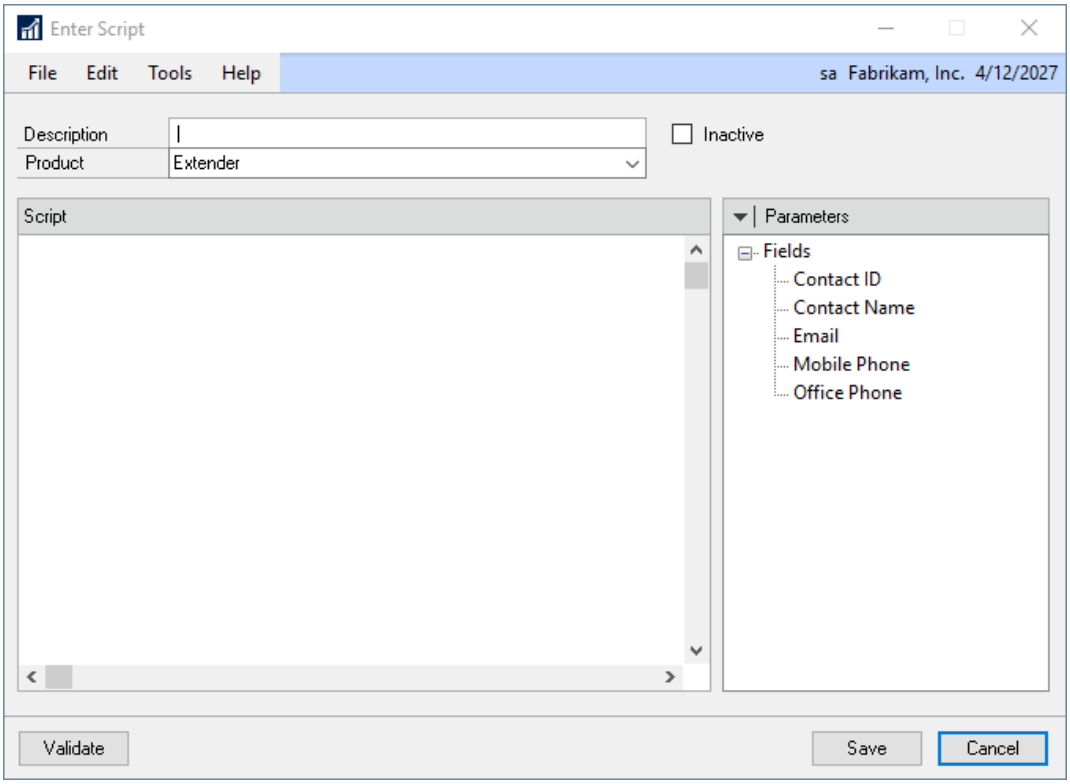
Run Dynamics GP Script (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

An Execute Script action type 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 action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Run Dynamics GP Script from the drop-down list



3. Enter a Description for the action type.
4. Select the product that you want to execute the script in.
5. Enter the script that you want to execute. Parameters, Forms, Tables, Sanscript Commands, and Function Library Commands
6. Click on the Save button.

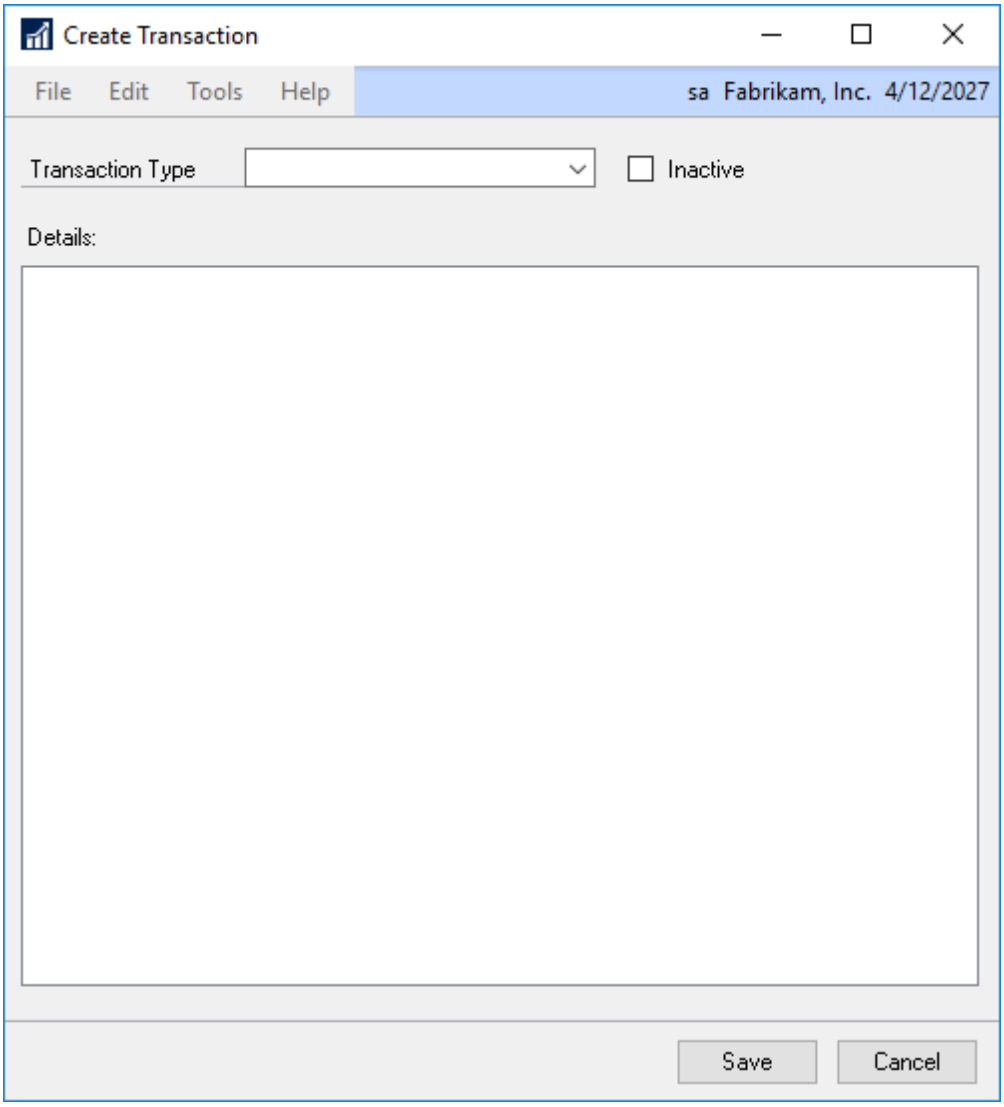
Create Dynamics GP Transaction (Enterprise Only)

A Create Dynamics GP Transaction action type pushes data from Extender forms to Microsoft Dynamics GP transactions. There are 7 types of transactions that can be created.



To add a Create Dynamics GP Transaction action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Create Dynamics GP Transaction from the drop-down list



3. Select the Transaction Type you would like to setup
4. Once a Transaction Type is selected the details will be displayed. Anything with the exclamation point icon needs to have the value set. Other details may or may not have the value set to already. If it is set, it can be changed. If it isn't set, it isn't required, but can be set if desired. When editing a detail, there can be several different options of where to pull the value from.
    a. Constant: enter a constant value for the field
    b. Calculation: create a calculation to set the field value
    c. Field: select a field from the Extender Form to populate the value
    d. None: select if a value is not needed for the field value
    e. Default: select to use the modules default value for the field
    f. Separate series: enter a value to use for the field. The field will be incremented as transactions are created.

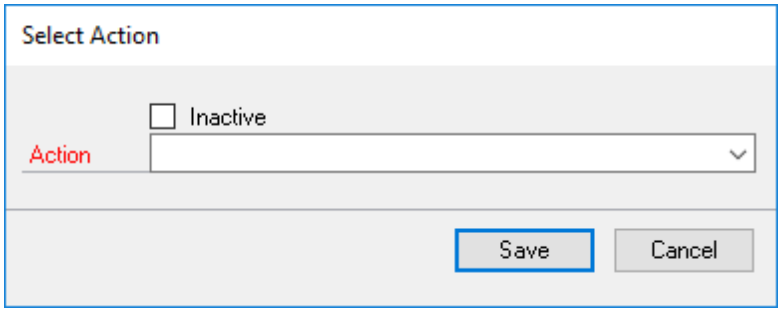
Run Another Action (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

The Run another action type allows you to execute another Run Dynamics GP script action.

To add Run another Action action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Run Dynamics GP Script from the drop-down list

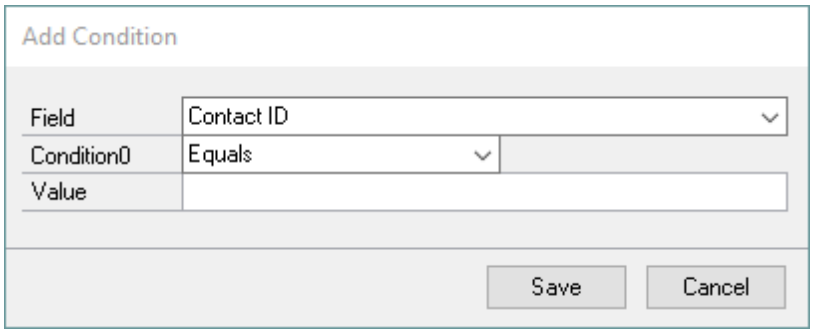


Conditions

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

To add a condition:

1. Select the action from the actions type list to add a condition to
2. Click on the Add button next to the Conditions List



3. Select the field to base the condition on.
4. Select the condition type.
5. Enter the value of the field.
6. 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 button next to 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 an existing condition:

1. Select the action type from the Actions list that the condition is on.
2. Select the condition that you want to remove from the Conditions list.
3. Click on the Remove button next to the Conditions list.

Imports

This section will guide you through the creation of an Extender Import. An Extender Import can be used to import data into an Extender Window or Form. Data can be imported from file types, including Comma Delimited, Tab Delimited, Excel Spreadsheet, and Free Form.

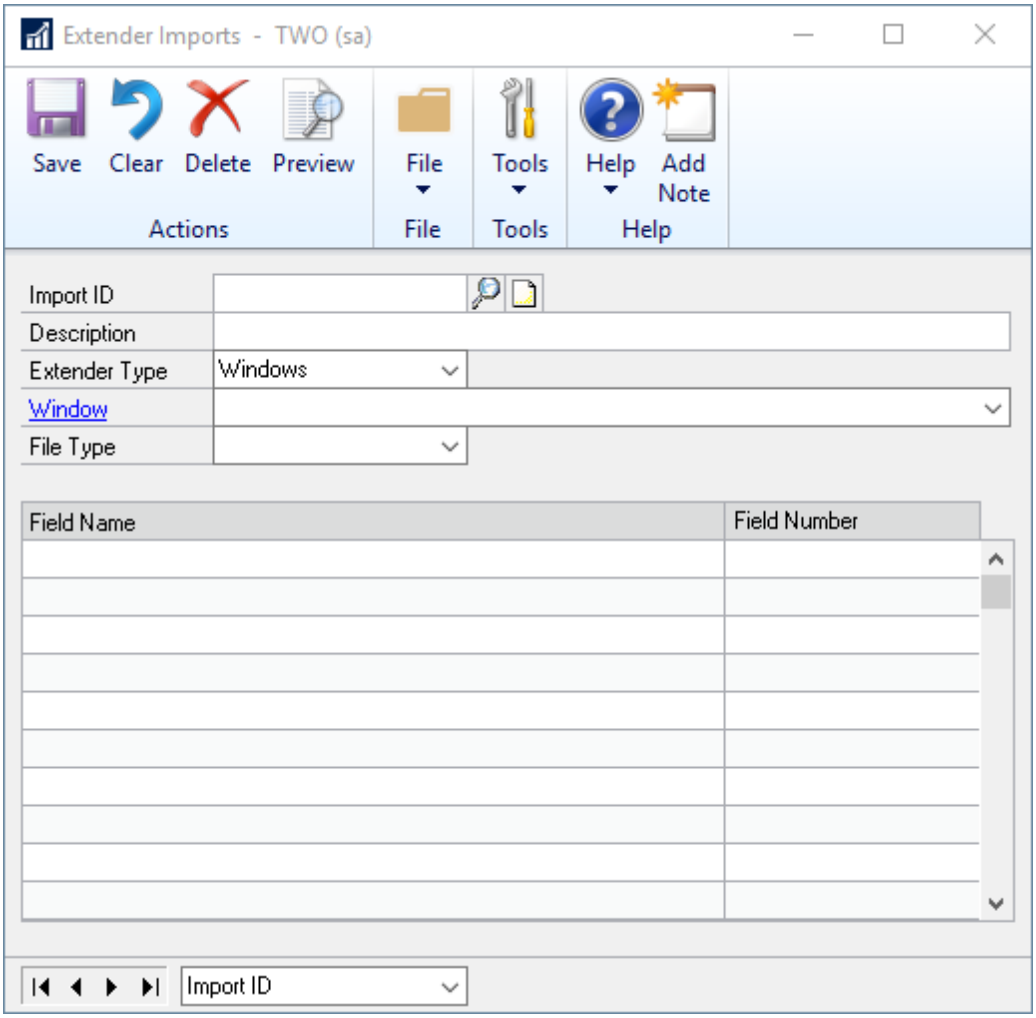
Imports can be useful when first setting up an Extender Window or Form to get the pre-existing data into the new Extender Resource. They can also be useful for periodic or regular importing of data into Extender Windows and Forms from another source.

Adding a New Import

You can use the Extender Imports window to create new Imports.

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.



4. Enter an ID and Description for the Import.
5. Select the Import Type.
6. Select the Extender ID for the Window or Form you want to import data into.
7. Select the File Type the data to import is saved in.
8. Map the Extender fields to the position in the file.
    - If the File Type is Excel, select the Column 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

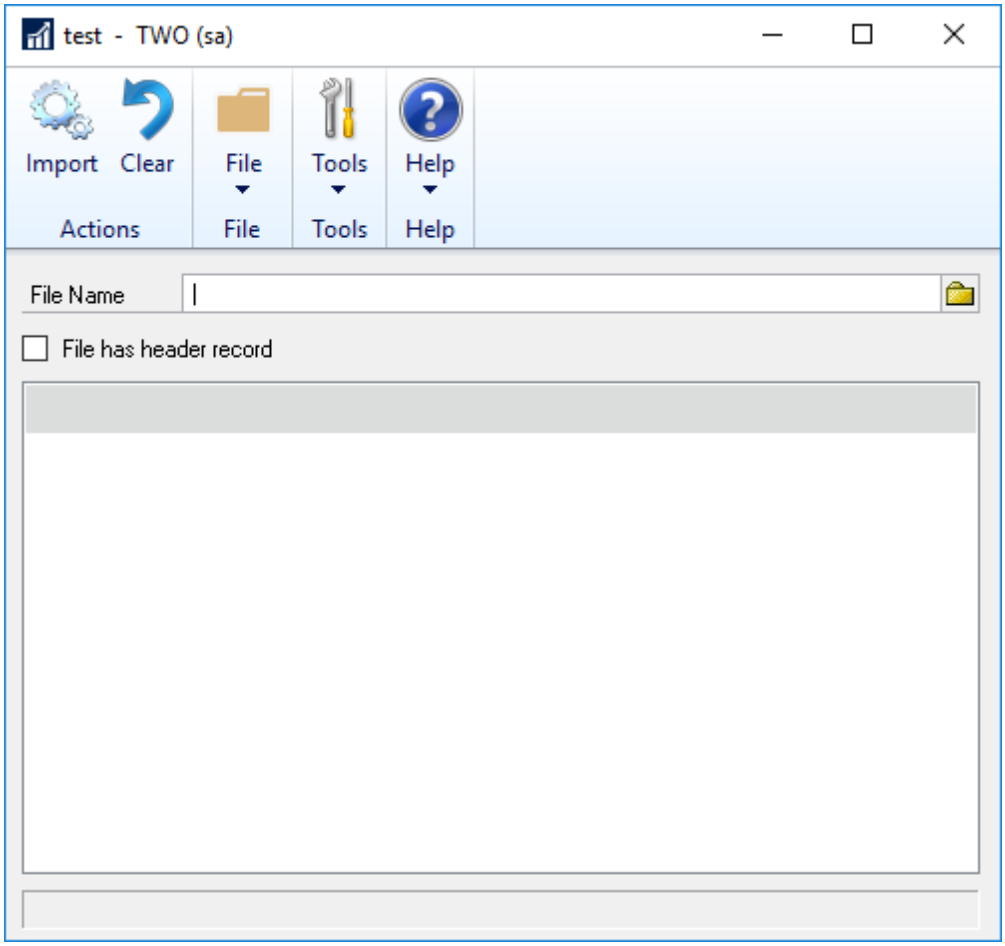
If you are importing records into a multicurrency form, you should have a default method specified for the currency if you are not importing the currency ID. If you do not have a default method, the exchange rates will not be defaulted and the functional currencies will not be calculated. Exchange rates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

Using Imports

You can use the Extender main window to access an import once it has been saved. You can also add an Import window to an Extender Menu.

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 Open to open the Extender Import window.
5. Click on the Use Import button .



6. Enter the file that contains the data to import.
7. If the file selected has a header record, mark the File has header record option.
8. Click on the Import button.

When importing list fields, the string value of the list item must be supplied. For example, you would need to import the string value "List Item A" to set the list to the first list item.

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.
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.
5. Click on the Delete button.

Lookups

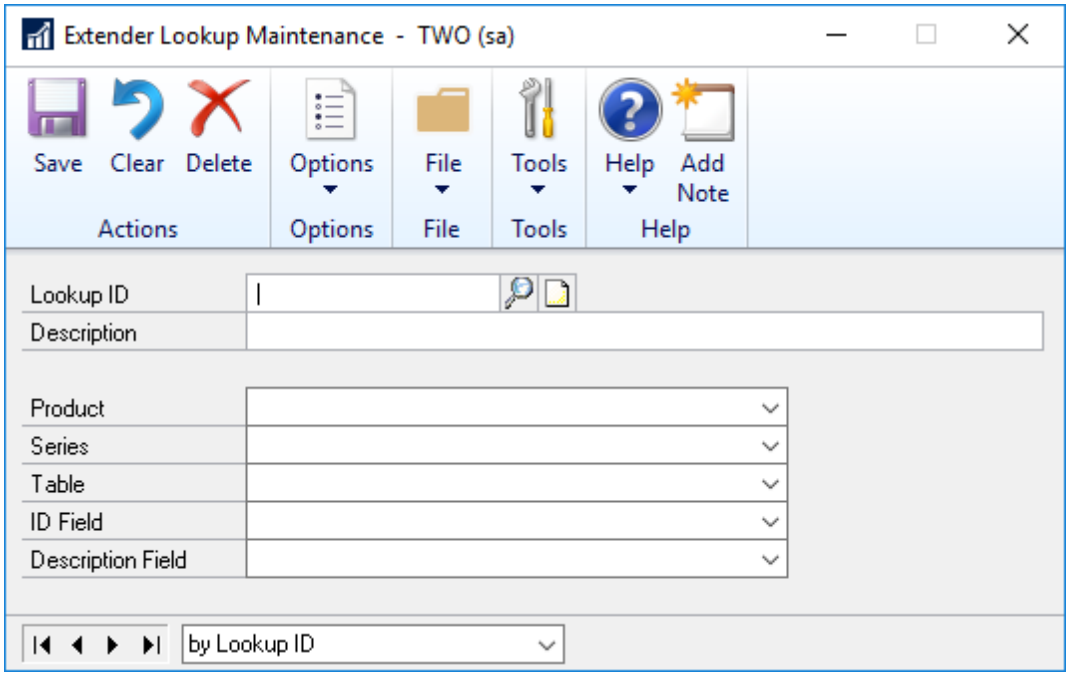
This section will guide you through the creation of an Extender Lookup. An Extender Lookup allows you to create a new lookup window that can be used to select and validate data for a lookup field on an Extender Window or Form. The data for the lookup is contained within an existing Microsoft Dynamics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

Adding a New Lookup

Use the Extender Lookups window to define new Lookups.

To add a new Lookup:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Select Lookups from the Extender Objects list.
3. Click New.



4. Enter a Lookup 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. The ID field must be a string field.
7. Click Save.

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 (Microsoft Dynamics GP >> 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 Open.
5. Enter the new information for the Lookup.
6. Click Save.

To update Lookup values:

1. Open the Extender window (Microsoft Dynamics GP >> 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 Open.
5. Select Options >> 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 (Microsoft Dynamics GP >> 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 Open.
5. Click Delete.

Menus

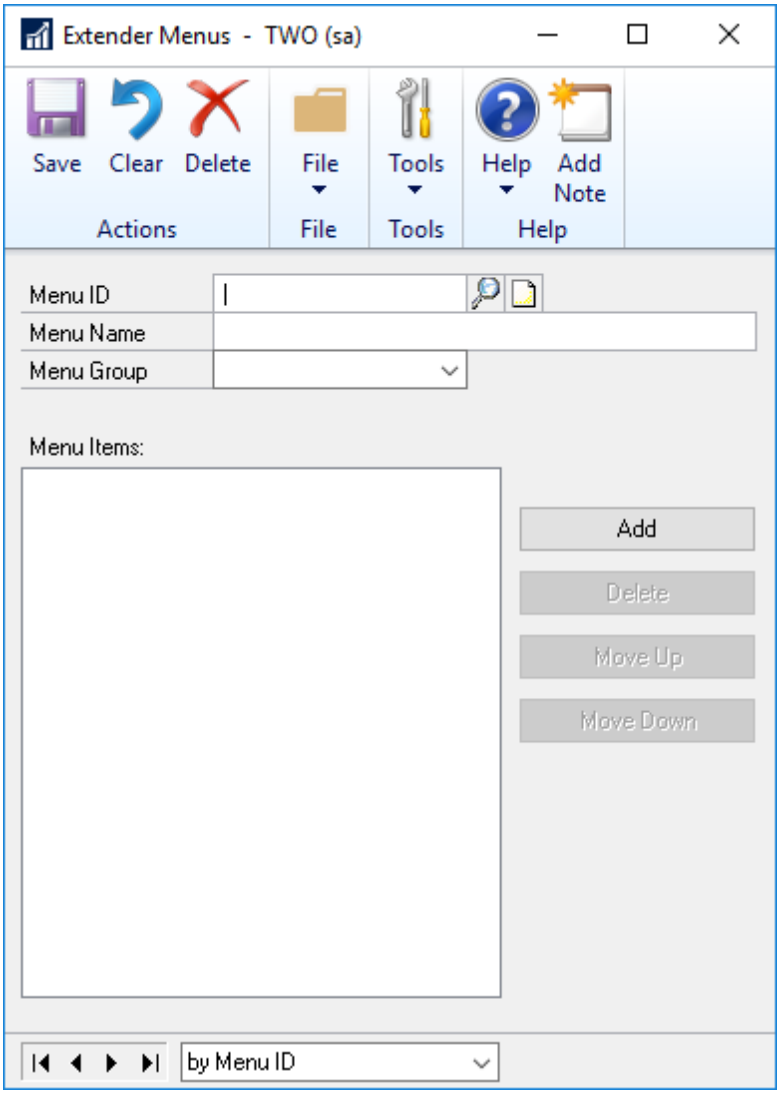
This section will guide you through the creation of an Extender Menu. An Extender Menu allows you to add your Extender objects to the Microsoft Dynamics GP menu structure. You can select to add your menu into the Transactions, Inquiry, Reports, Cards or Routines menus.

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.



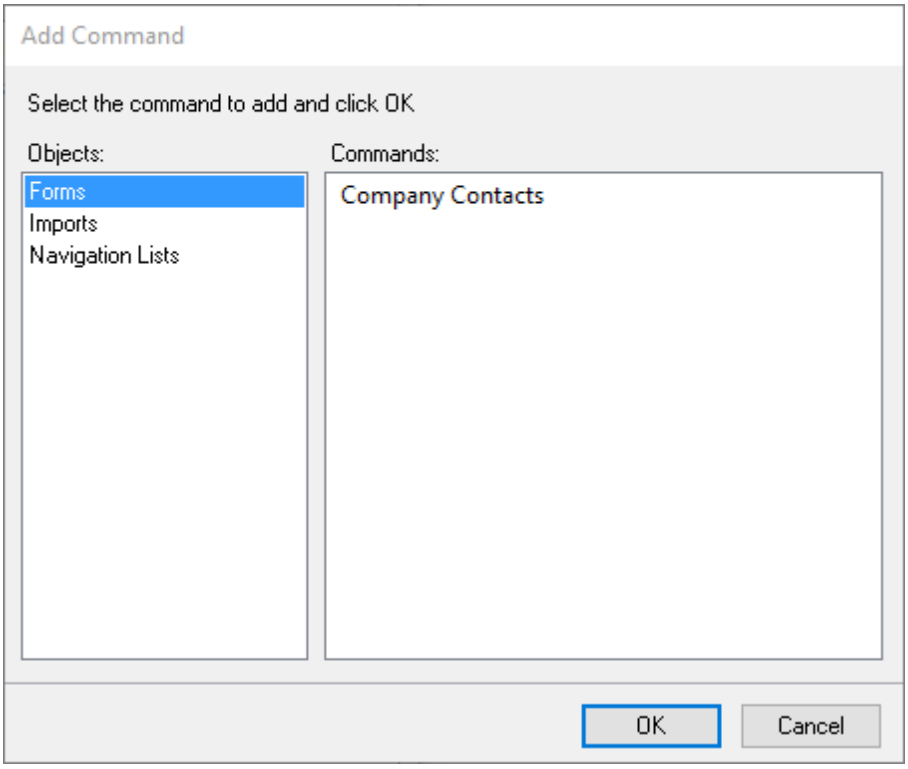
4. Enter a Menu ID and Menu Name for the Menu.
5. Select the Menu Group for the Menu.
6. Add the items that you want to be on the Menu. You can add a maximum of 20 items to each menu.
7. Click on the Save button.

Adding Menu Items

There are 2 types of menu items that can be added; Extender Resources and Dynamics GP Forms.

To add an Extender Resource menu item:

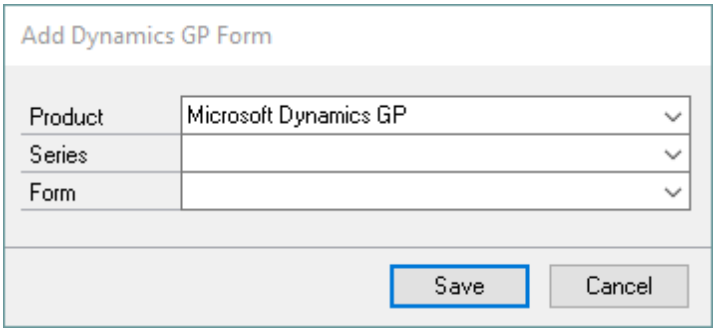
1. Click Add and select Extender Resource.



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

To add a Dynamics GP Form Menu item:

1. Click Add and select Dynamics GP Form.



2. Select the Product, Series and Form that you want to add to the menu.
3. Click Save.

To remove a menu item:

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

To change the order of an item on a Menu:

1. Select the Menu item you want to move.
2. Click Move Up to move the menu item up and click Move Down 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 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.
5. Enter the new information for the Menu.
6. Click on the Save button.

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.
5. Click on the Delete button.

Actions (Enterprise Only)

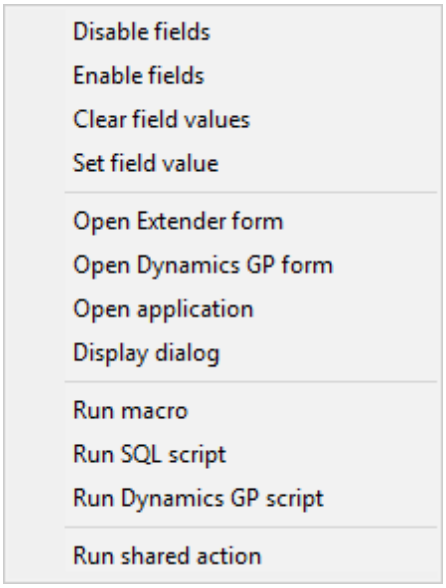
*** This feature is only available in Extender Enterprise. ***

This module will walk you through adding Actions to Extender outside or Windows and Forms.

Actions (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

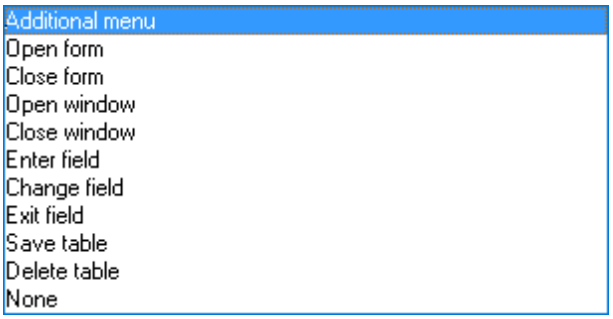
Extender Actions allow a window to perform specific actions based on user input. There are twelve actions that can be performed. Not all actions are available depending on the Event Type.



- Disable Field: will disable the selected Extender field. This will allow data to be displayed, but not entered or changed.
- Enable Fields: can be used to enable fields that were previously disabled using the Disable Field Action. When a field is enabled, the data in it can be added or changed.
- Clear field values: can be used to clear the value entered in field
- Set field value: can be used to enter a specific value into a field
- Open Extender form: can be used to open an Extender form
- Open Dynamics GP form: can be used to
- Open application: will run an external application
- Display dialog: can be used to display an Extender Dialog

- Run macro: will run a recorded Microsoft Dynamics GP macro
- Run SQL script: can be used to run a SQL script
- Run Dynamics GP script: can be used to run a Dexterity script
- Run Shared Action: will call another Run Dynamics GP Script action that is setup

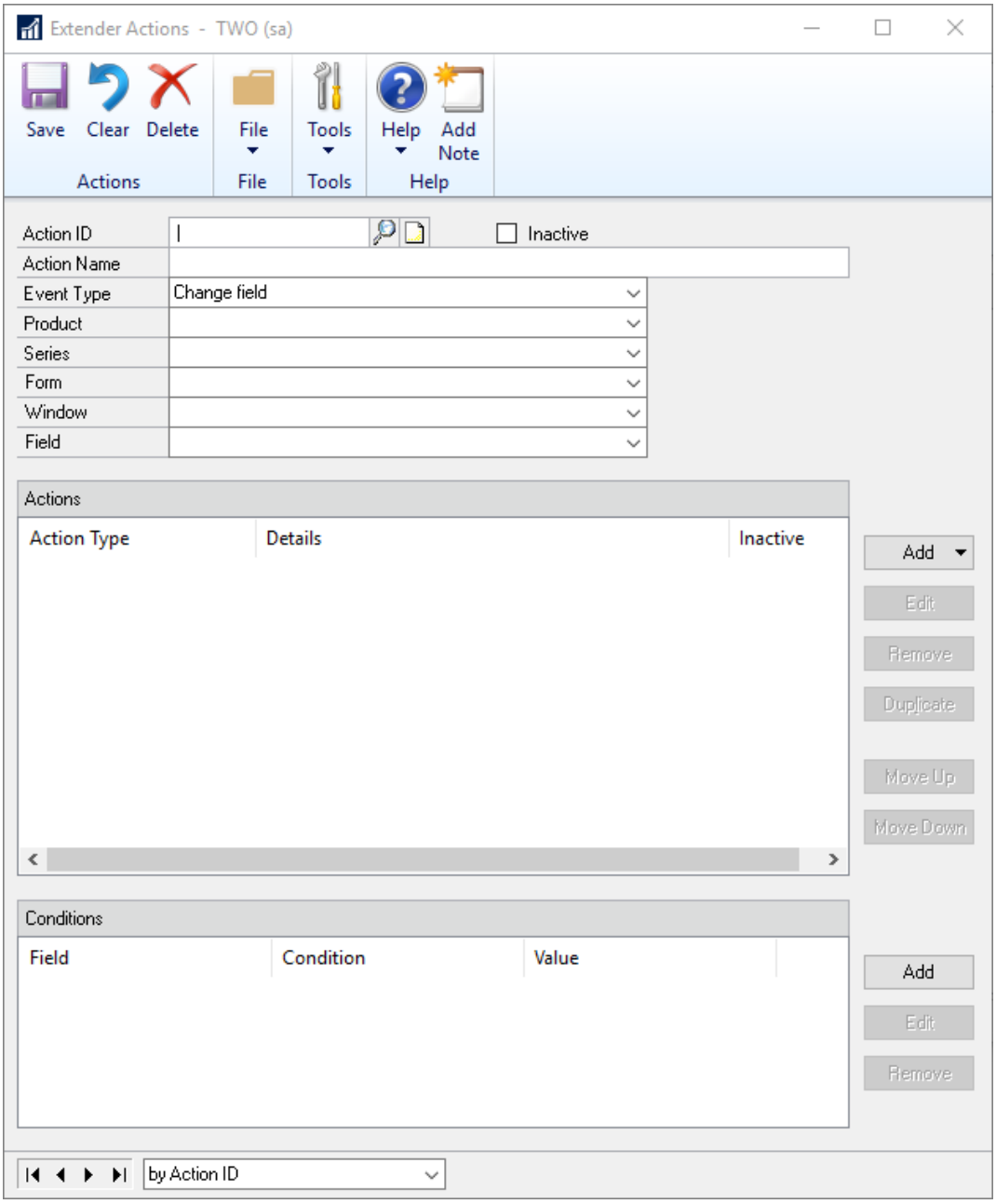
There are eleven events in an Extender Actions can be added to. An event is an action that occurs within your Extender application. You can use events to trigger new functionality in your application. When you open the Actions window, all events for the Extender resource are displayed. Conditions can also be added to conditionally perform any of above actions.



- Additional Menu: triggers when selected from the Additional menu
- Open Form: triggers when the form is opened
- Close Form: triggers when the form is closed
- Open Window: triggers when the window is opened
- Close Window: triggers when the window is closed
- Enter Field: triggers whenever a specific field receives focus in an Extender Window.
- Change Field: triggers when the specified field has been changed in a Window. The action runs after focus has been lost from the selected field.
- Exit Field: triggers whenever a specific field loses focus in an Extender Window
- None: setups an action that can be called from another action

To add an Extender Action

1. Select Actions under the Solution and click the New button.



2. Enter an Action ID and Action Name for the action.
3. Select the Event Type from the Event Type drop down list.
4. Depending on the Event Type, select the Product, Series, Form, Window, Field, etc that is available.
5. Click on the Add button in the Add Actions window.
6. Select your Action Type from the drop down list.

To modify an existing action type:

1. Select the action type that you want to modify from the Actions list.

2. Click on the Edit button next to the Actions list.
3. Enter the new information for the action.
4. Click on the Save button.

To duplicate an existing action type:

1. Select the action type that you want to duplicate from the Actions list.
2. Click on the Duplicate button next to the Actions list.

To inactivate an existing action type:

1. Select the action type that you want to inactivate from the Actions list.
2. If you want to inactivate the action as a whole, mark the Inactive checkbox at the top of the Extender Actions window.
3. If you want to inactivate a specific action in the main action, highlight the specific action and then click the Edit button. Mark the inactive icon and save the action.
4. Save the main action.

If you no longer want an action type on an action, it can be removed.

To remove an existing action type:

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

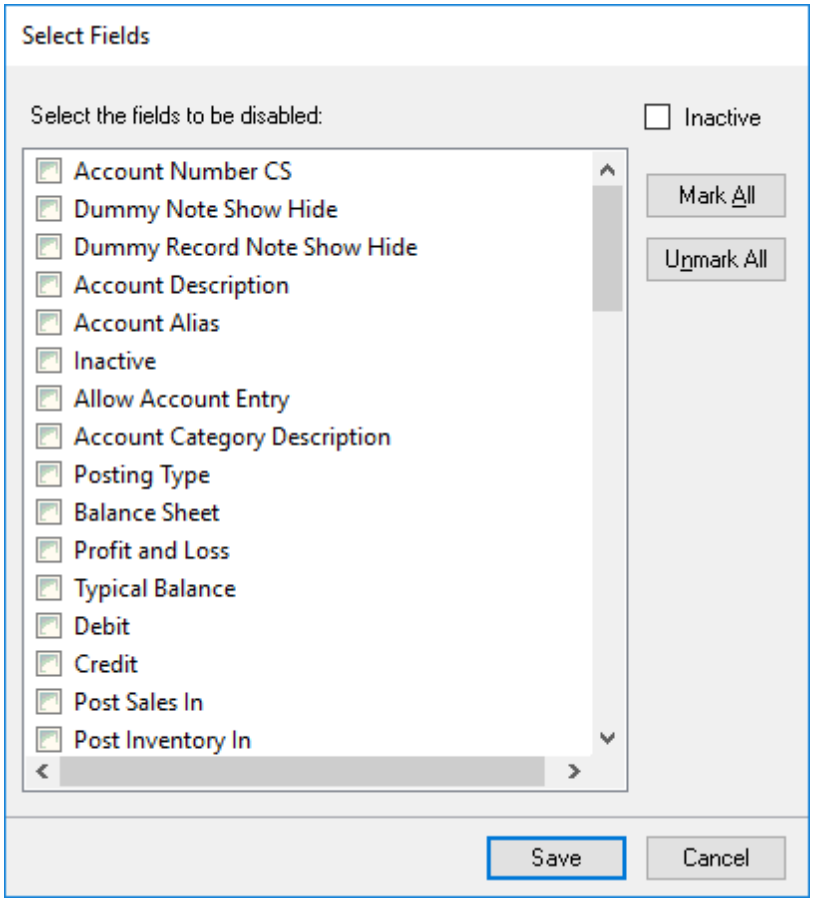
Disable Fields (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Disable Fields action type disables a number of fields on the resource.

To add a Disable Fields action type:

1. Select the event from the Events list that you want to add a Disable Fields action type to
2. Click on the Add button next to the Actions list and select Disable Fields from the drop-down list



3. Mark the fields that you want to disable.
4. Click on the Save button.

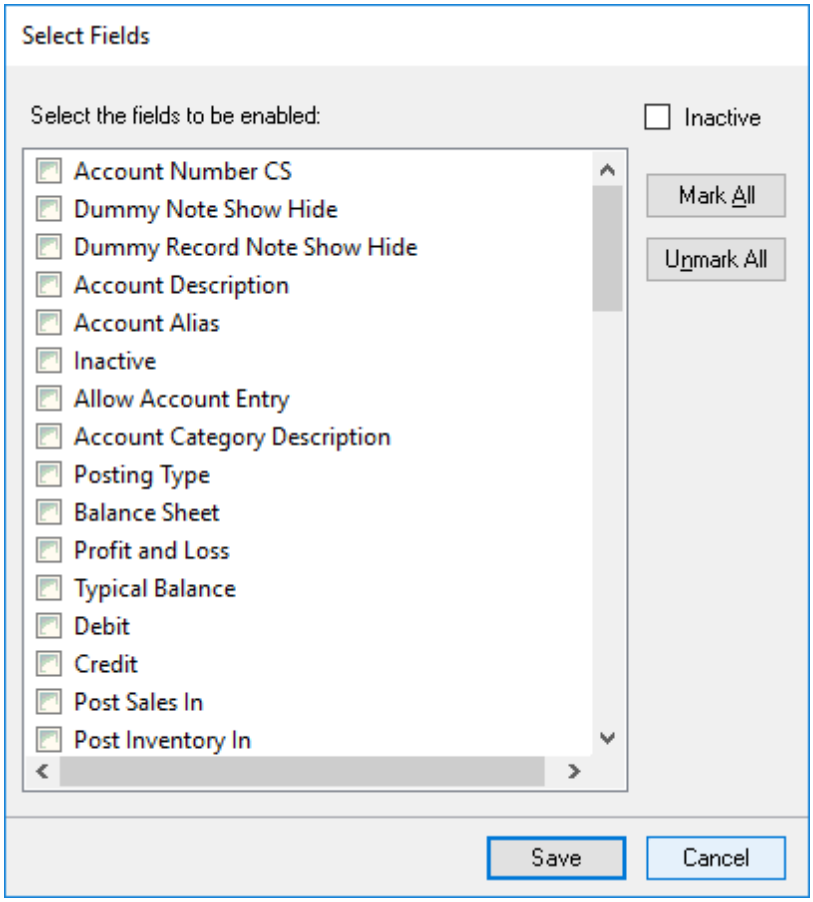
Enable Fields (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

An Enable Fields action type enables a number of fields on the resource.

To add an Enable Fields action type:

1. Select the event from the Events list that you want to add an Enable Fields action type to
2. Click on the Add button next to the Actions list and select Enable Fields from the drop-down list



3. Mark the fields that you want to enable.
4. Click on the Save button.

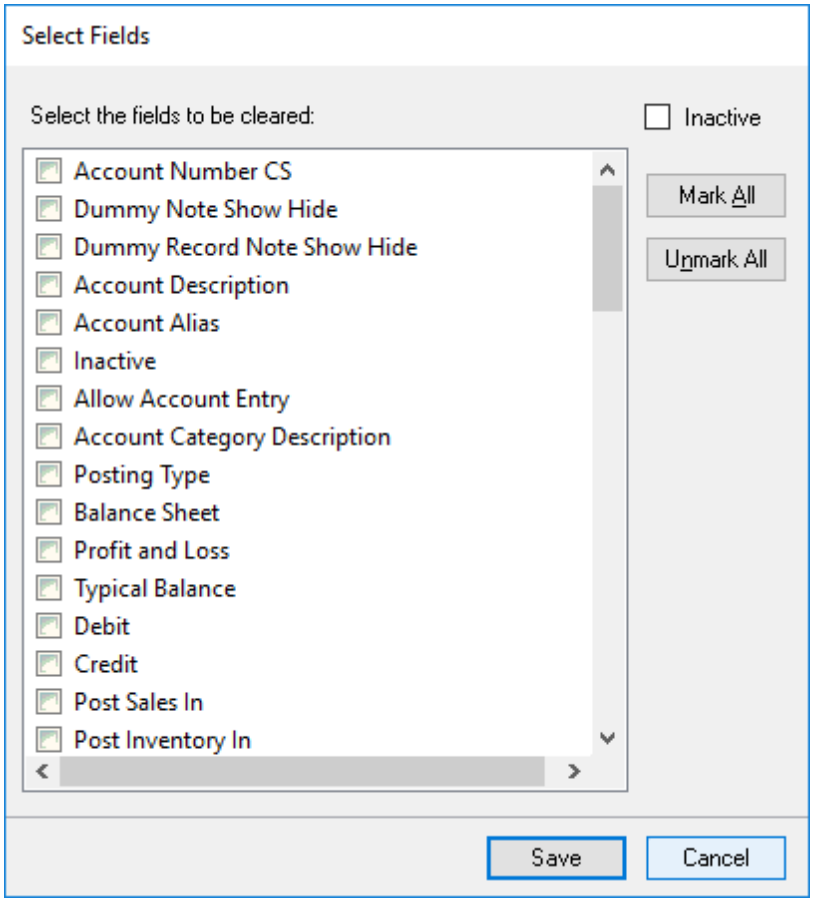
Clear Field Value (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Clear Values action type clears a number of fields on the resource.

To add a Clear Values action type:

1. Select the event from the Events list that you want to add a Clear Values action type to
2. Click on the Add button next to the Actions list and select Clear Values from the drop-down list



3. Mark the fields that you want to clear.
4. Click on the Save button.

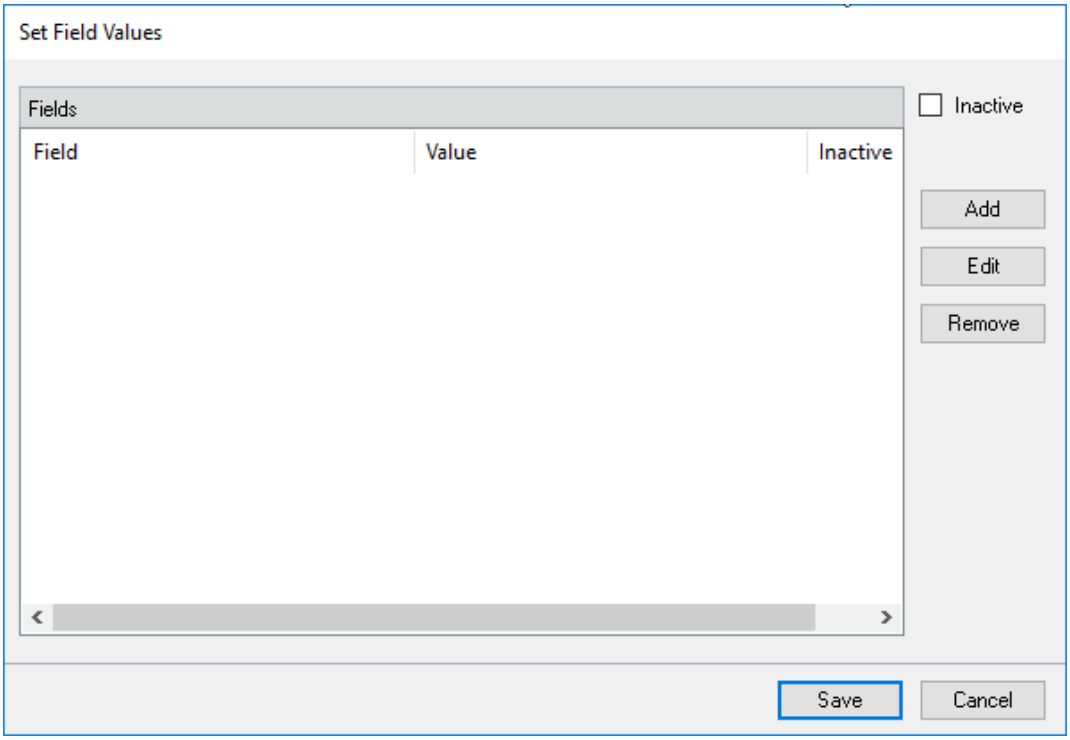
Set Field Value (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

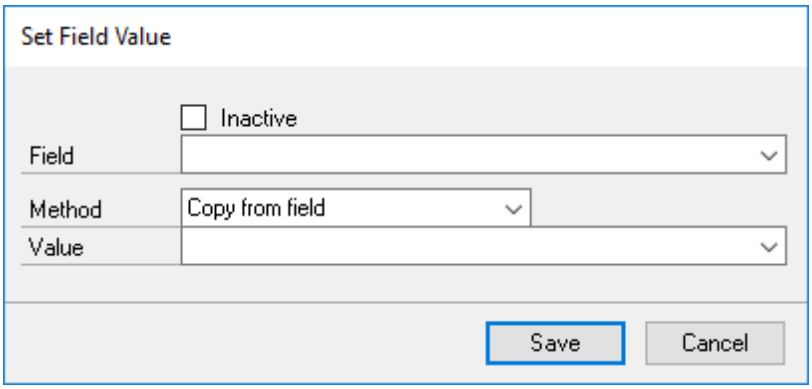
A Set Value action type sets the value of a single field on the resource.

To add a Set Value action type:

1. Select the event from the Events list that you want to add a Set Value action type to



2. Click on the Add button next to the Actions list and select Set Field Value from the drop-down list
3. Select Add to add a field to set the value for.



4. Select the field that you want to set the value of.
5. Select the method to use to set the value.
6. Enter the value that you want to set the field to.
7. Click on the Save button.

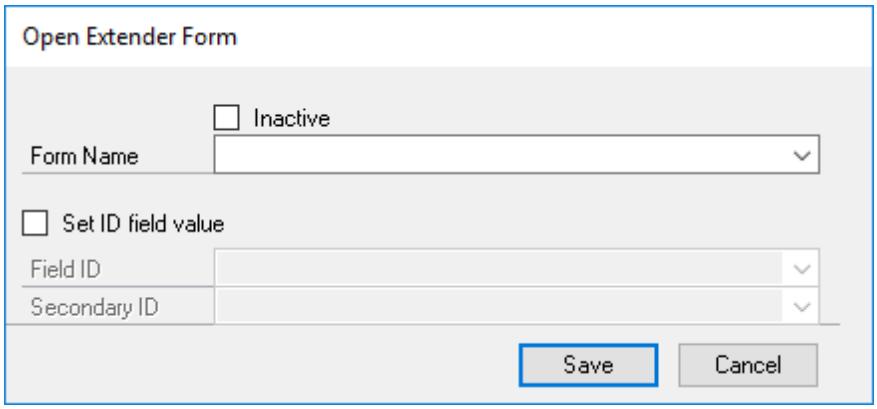
Open Extender Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

An Open Extender Form action type opens an Extender Form.

To add an Open Extender Form action type:

1. Select the event from the Events list that you want to add an Open Extender Form action type to
2. Click on the Add button next to the Actions list and select Open Extender Form from the drop-down list.



3. Select the Form that you want to open.
4. If you want data to populate in the form ID when it is opened based on a field on the form, mark the Set ID field value checkbox and select the field from the form to populate the Field ID. If the form has a secondary ID on it, select the Secondary ID as well.

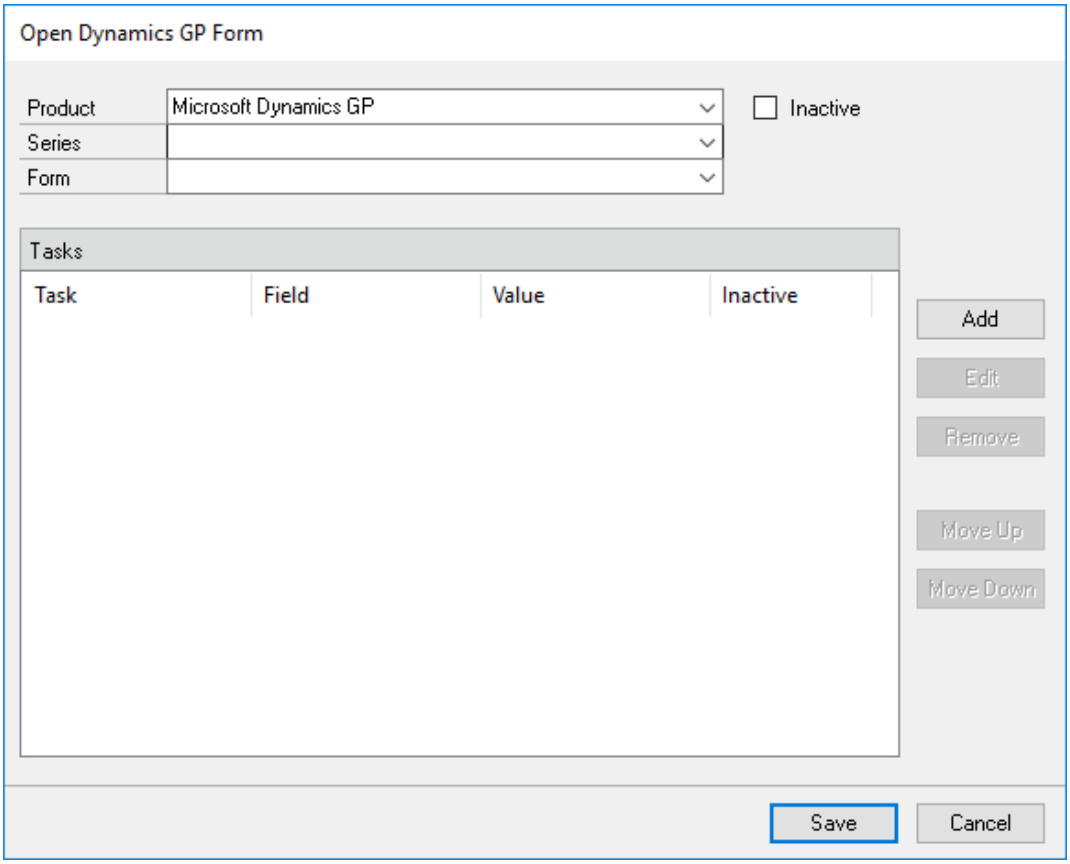
Open Dynamics GP Form (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

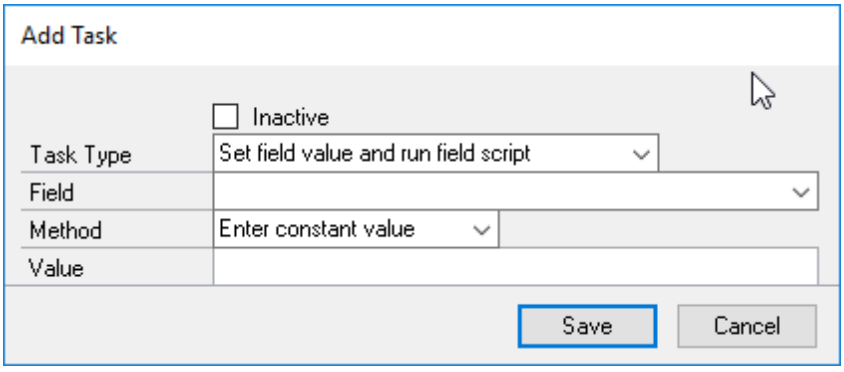
An Open Dynamics GP Form action type opens a Dynamics GP Window when run. You can open the form for a new record or pass data to the form.

To add an Open Dynamics GP Form action type:

1. Select the event from the Events list that you want to add a Set Value action type to
2. Click on the Add button next to the Actions list and select Open Dynamics GP Form from the drop-down list



3. Select the Product, Series, and Form for the Dynamics GP form to be opened.
4. To add a task to pass data to the window, click Add.



5. Select the Task type to use to pass the data to the window
6. Select the Field to pass data to, the Method to populate it, and the value to use.
7. Click on the Save button.
8. If additional Tasks need to be added, repeat steps 4-7.
9. Click Save.

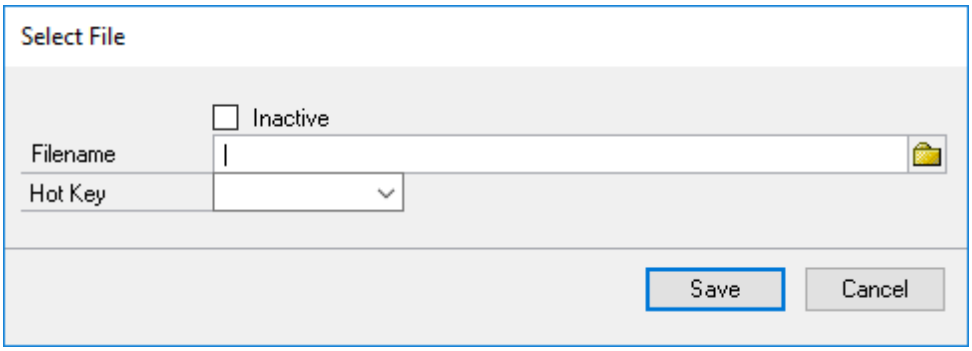
Open Application (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add an Open Application action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Open Application from the drop-down list



3. Enter the filename of the application that you want to run.
4. Click on the Save button.

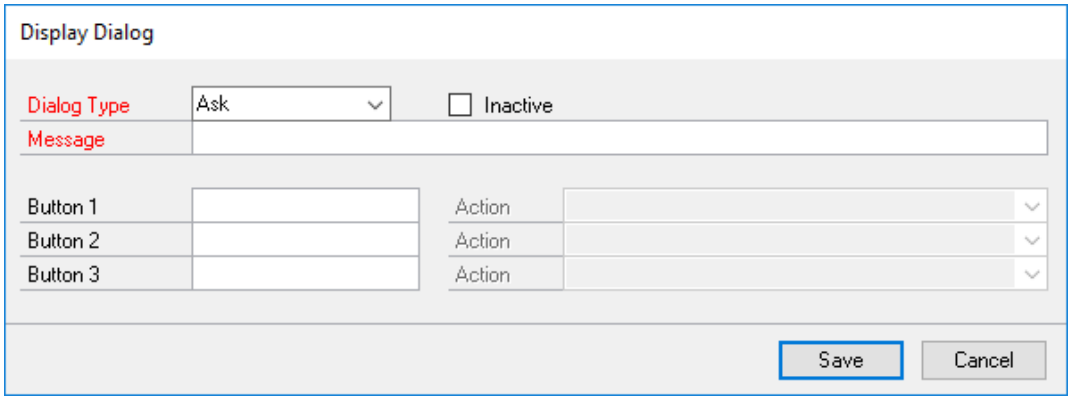
Display Dialog (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Display Dialog action type presents the end user with a message window. The window can display a message, ask a question, or request input.

To add a Display Dialog action type:

1. Select the event from the Events list that you want to add an Open Application task to
2. Click on the Add button next to the Actions list and select Display Dialog from the drop-down list



3. Select the Dialog Type.
4. If the Dialog Type is Ask, enter a question and values for the answer buttons. Actions can also be added for each button.
5. If the Dialog Type is Input, enter a question.
6. If the Dialog Type is Message, enter a Message to display.
7. Click on the Save button.

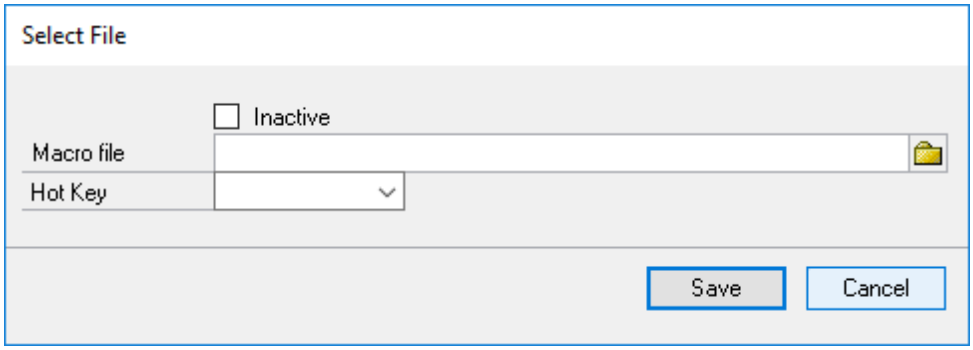
Run Macro (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

A Run Macro action type runs a Microsoft Dynamics GP macro.

To add a Run Macro action type:

1. Select the event from the Events list that you want to add a Run Macro task to
2. Click on the Add button next to the Actions list and select Run Macro from the drop-down list



3. Enter the filename of the macro that you want to run.
4. Click on the Save button.

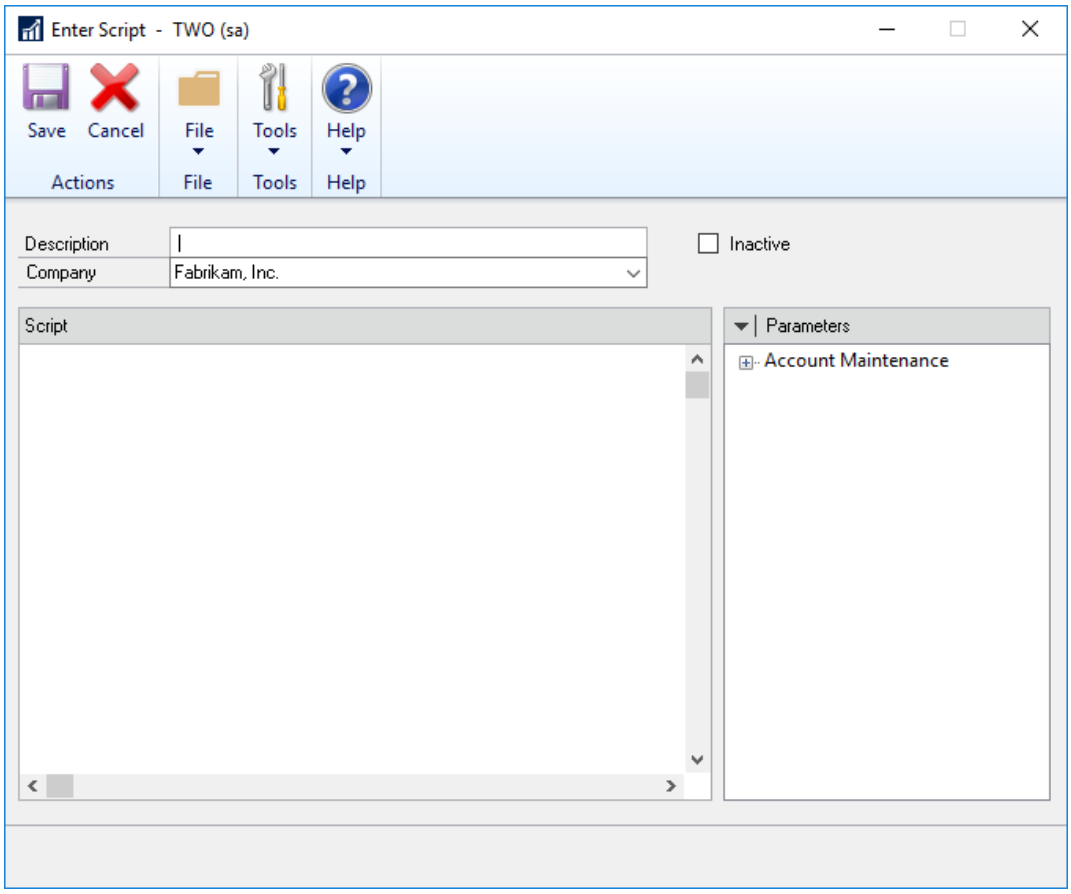
Run SQL Script (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add a Run SQL Script action type:

1. Select the event from the Events list that you want to add a Run SQL task to
2. Click on the Add button next to the Actions list and select Run SQL Script from the drop-down list



3. Enter a Description for the action type.
4. Select the Company that you want run the SQL script in. This can be a Microsoft Dynamics GP company or the system database.
5. Enter the SQL script that you want to run. Parameters and Tables can be selected from the list on the right.
6. Click on the Save button.

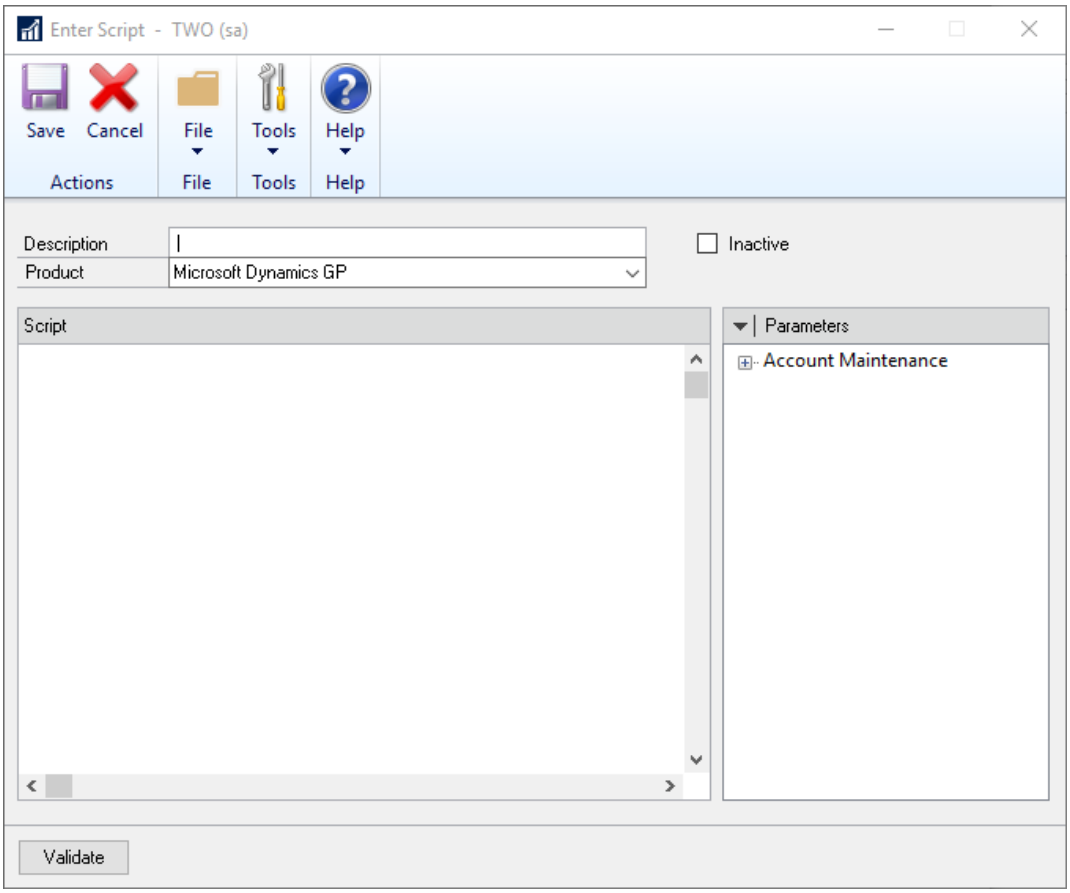
Run Dynamics GP Script (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

An Execute Script action type 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 action type:

1. Select the event from the Events list that you want to add an Execute Script task to
2. Click on the Add button next to the Actions list and select Run Dynamics GP Script from the drop-down list



3. Enter a Description for the action type.
4. Select the product that you want to execute the script in.
5. Enter the script that you want to execute. Parameters, Forms, Tables, Sanscript Commands, and Function Library Commands
6. Click on the Save button.

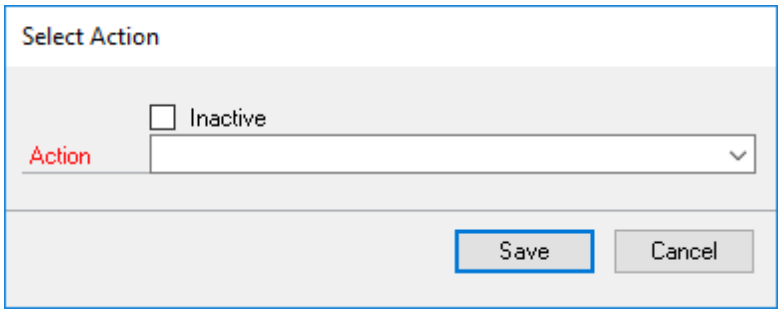
Run Shared Action (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

The Run shared action type allows you to execute another Run Dynamics GP script action.

To add Run Shared Action action type:

1. Select the event from the Events list that you want to add an Execute Script task to.
2. Click on the Add button next to the Actions list and select Run Shared Action from the list.



3. Select the Action to run.

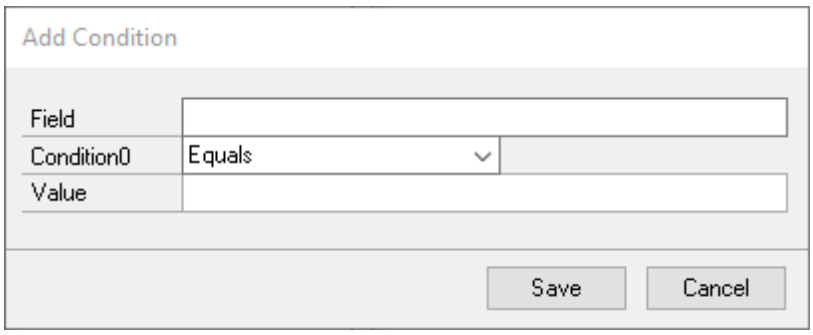
Conditions (Enterprise Only)

*** This feature is only available in Extender Enterprise. ***

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

To add a condition:

1. Select the action from the actions type list to add a condition to
2. Click on the Add button next to the Conditions List



3. Select the field to base the condition on.
4. Select the condition type.
5. Enter the value of the field.
6. 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 button next to 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 an existing condition:

1. Select the action type from the Actions list that the condition is on.
2. Select the condition that you want to remove from the Conditions list.
3. Click on the Remove button next to the Conditions list.

Views

This section 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 and Extender Forms. It is useful when you want to use Extender data in external reporting packages such as Crystal Reports or SQL Server Reporting Services.

Adding a new View

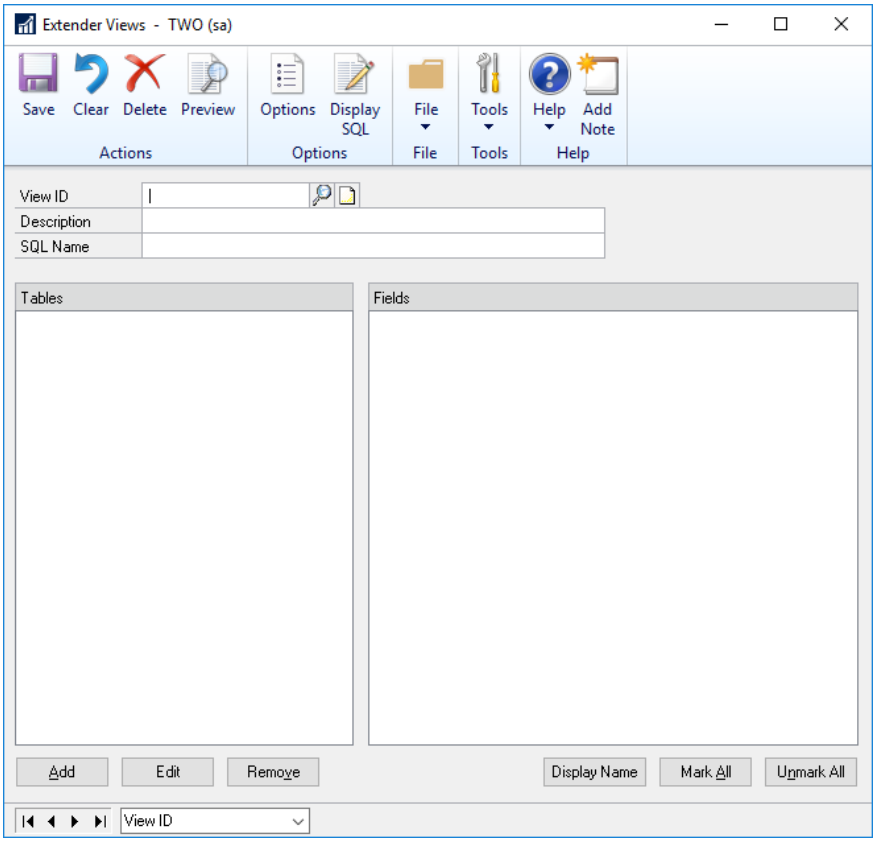
Use the Extender Views window to define new Views.



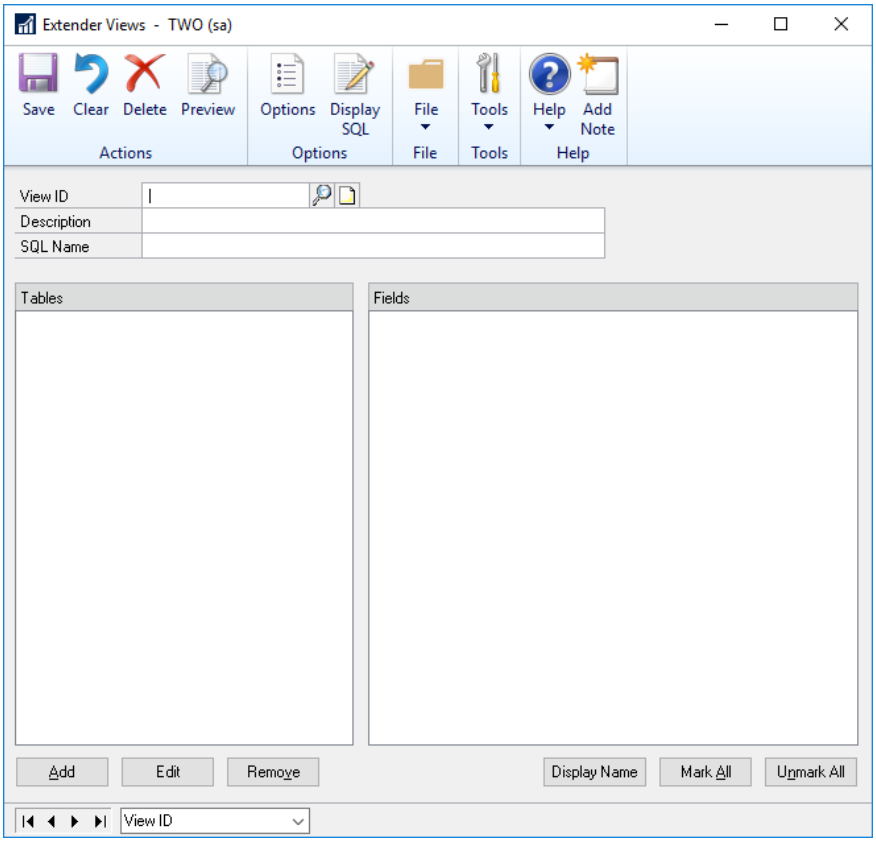
You can create and edit Views only when logged in as a user that has the SQL server role of sysadmin or the database role of db_owner.

To add a new View:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Create a new View.
    a. Option 1:
        i. Expand the Solution that the view is to be added too.
        ii. Select Views from within the solution.
        iii. Click New.



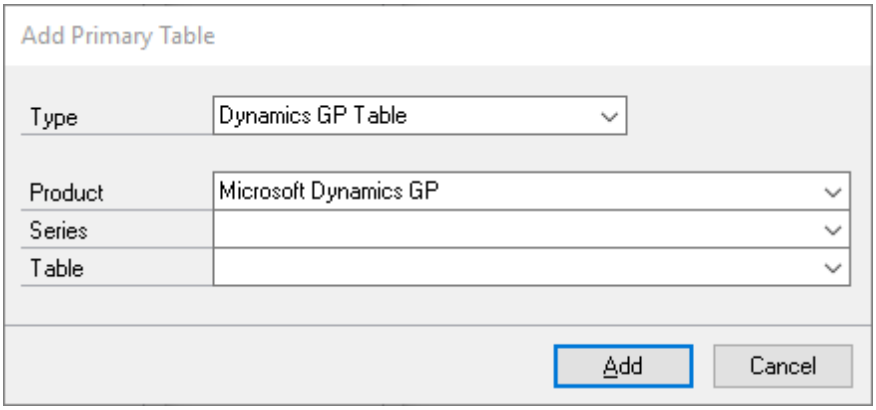
b. Option 2:
    i. Select the Solution that the view is to be added too.
    ii. Click the drop down arrow next to the New button.
    iii. Select View.



3. Enter a View ID and Description for the View.
4. Enter a SQL Name of the view. This is the name that will be used when the SQL View is created.
5. Select the Primary Table
6. Select additional tables.
7. Select fields to include in the view.
8. Click the Display Name button to change the display name of the views fields.
9. Click on the Save button.

To select the Primary Table:

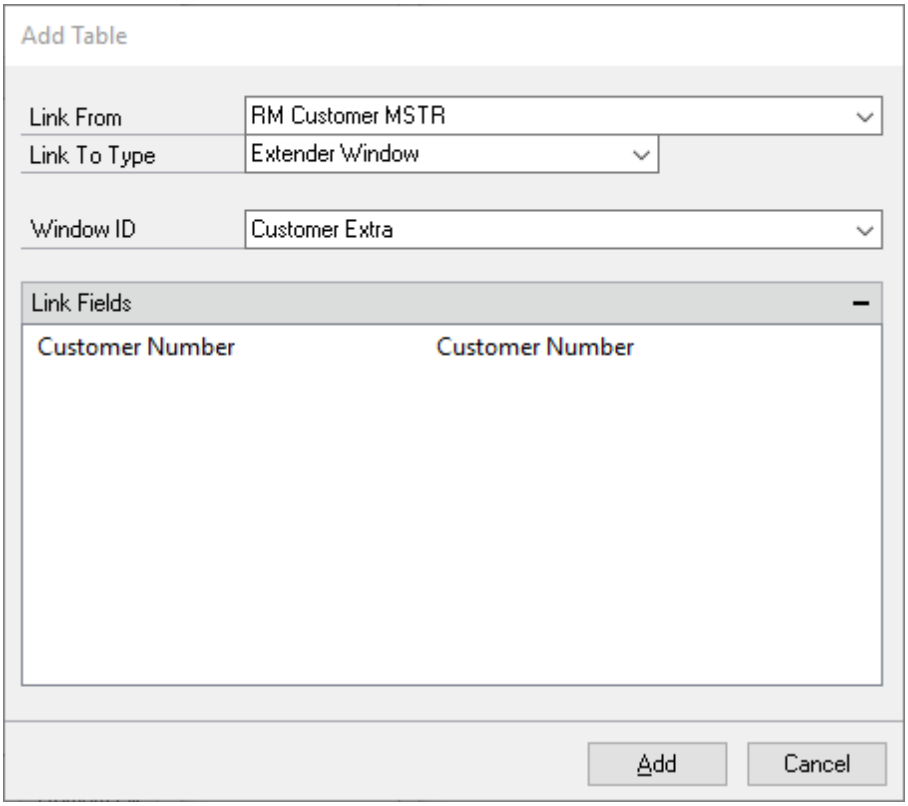
1. Click on the Add button.



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, select the Form ID.
3. Click on the Add button.

To select an additional table:

1. Click on the Add button.



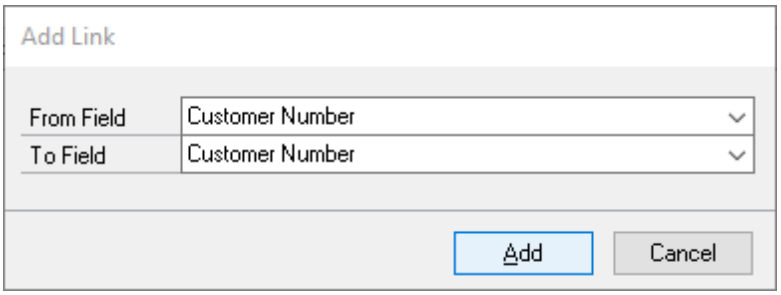
2. Select the table already selected to link the additional table to.
3. Select the Link To Type:

- 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 extenders 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.

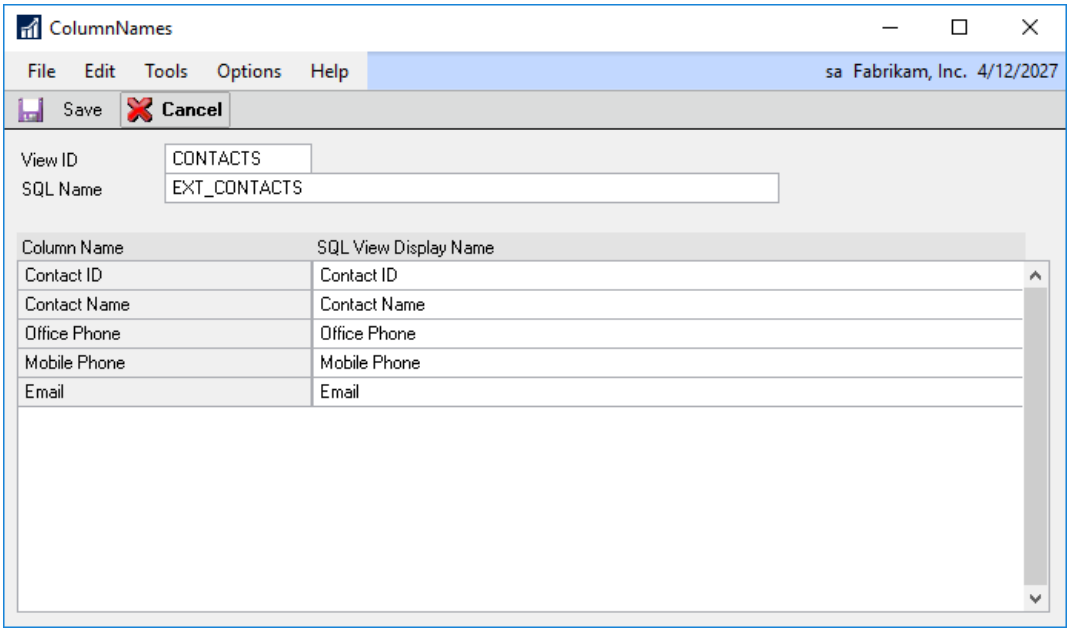
The linking of two fields always uses a Left Outer join.

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.

To change the display name:

1. Click the Display Name button.
2. Change the display name of any of the fields in the view by changing the name in the SQL View Display name column.



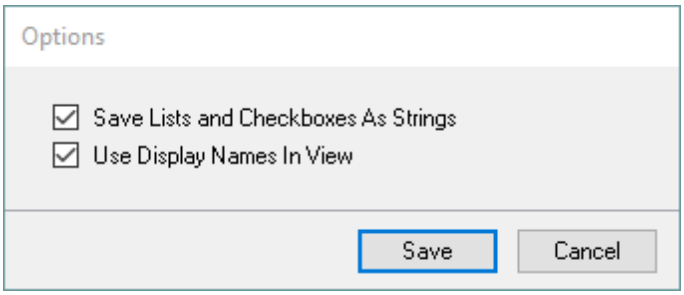
3. Click Save to save the file names.

View Options

You can change the options on a View by using the Options window.

To set the Options on a View:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender).
2. Expand the Solution the view is in and select Views.
3. Select the View that you want to set the options to and click the Open button.
4. Click the Options button.
    a. Save Lists and Checkboxes as Strings - Mark this option if you want to report on Extender Lists or Checkboxes and you want to see the string value. Unmark it if you want to use the view to import data.
    b. Use Display Names in View - This changes the column headings of the View in SQL.

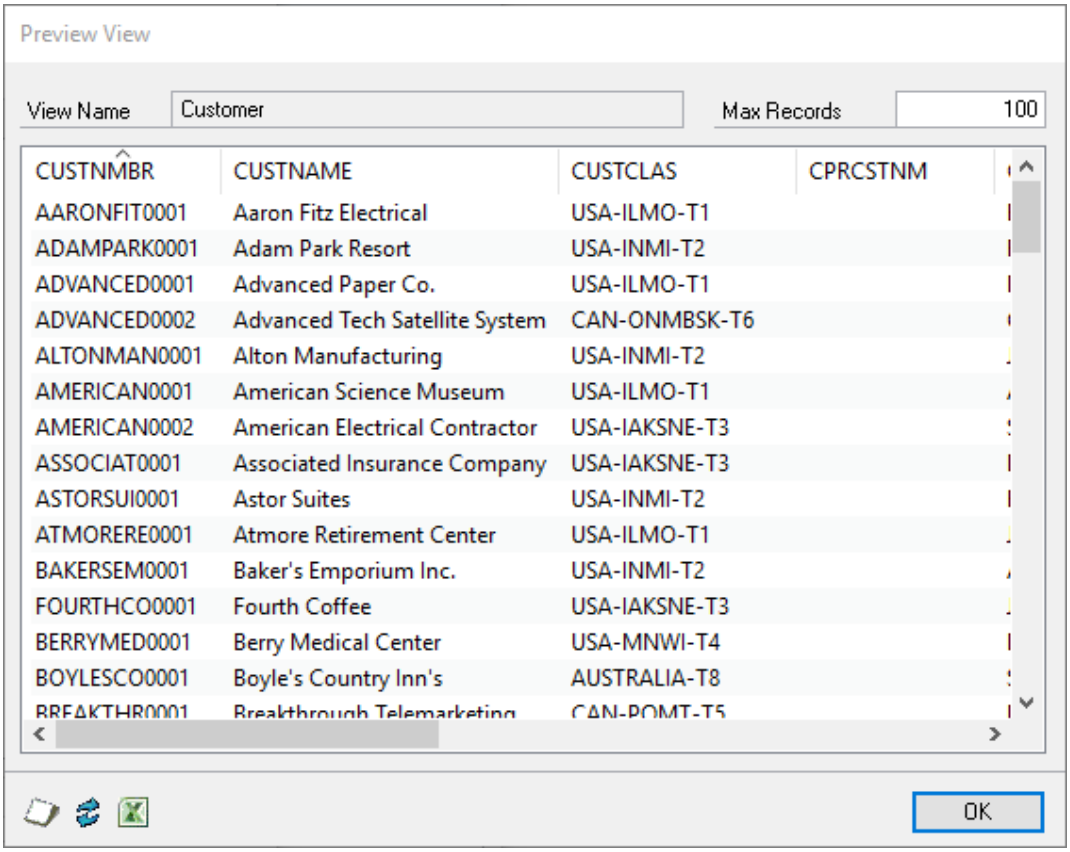


5. Click Save

Previewing A View

To preview a view:

1. Open the Extender window (Microsoft Dynamics GP >> Tools >> Extender >> Extender)
2. Expand the Solution the view is in and select Views.
3. Select the View that you want to set the options to and click the Open button.
4. Click on the Preview button



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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender)
2. Expand the Solution the view is in and select Views.
3. Select the View that you want to modify from the Extender Resources list.
4. Click on the Open button.
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 (Microsoft Dynamics GP >> Tools >> Extender >> Extender)
2. Expand the Solution the view is in and select Views.
3. Select the View that you want to remove from the Extender Resources list.
4. Click the Open button
5. Click the Delete button.
6. When prompted, click Delete to confirm the deletion.

Security

This section walk through how to grant or deny security to an Extender resource. Extender resources can be added to existing Microsoft Dynamics GP security tasks or new security tasks can be created. These tasks can be added to Microsoft Dynamics GP security roles, which are then assigned to users.

Access to Create Resources

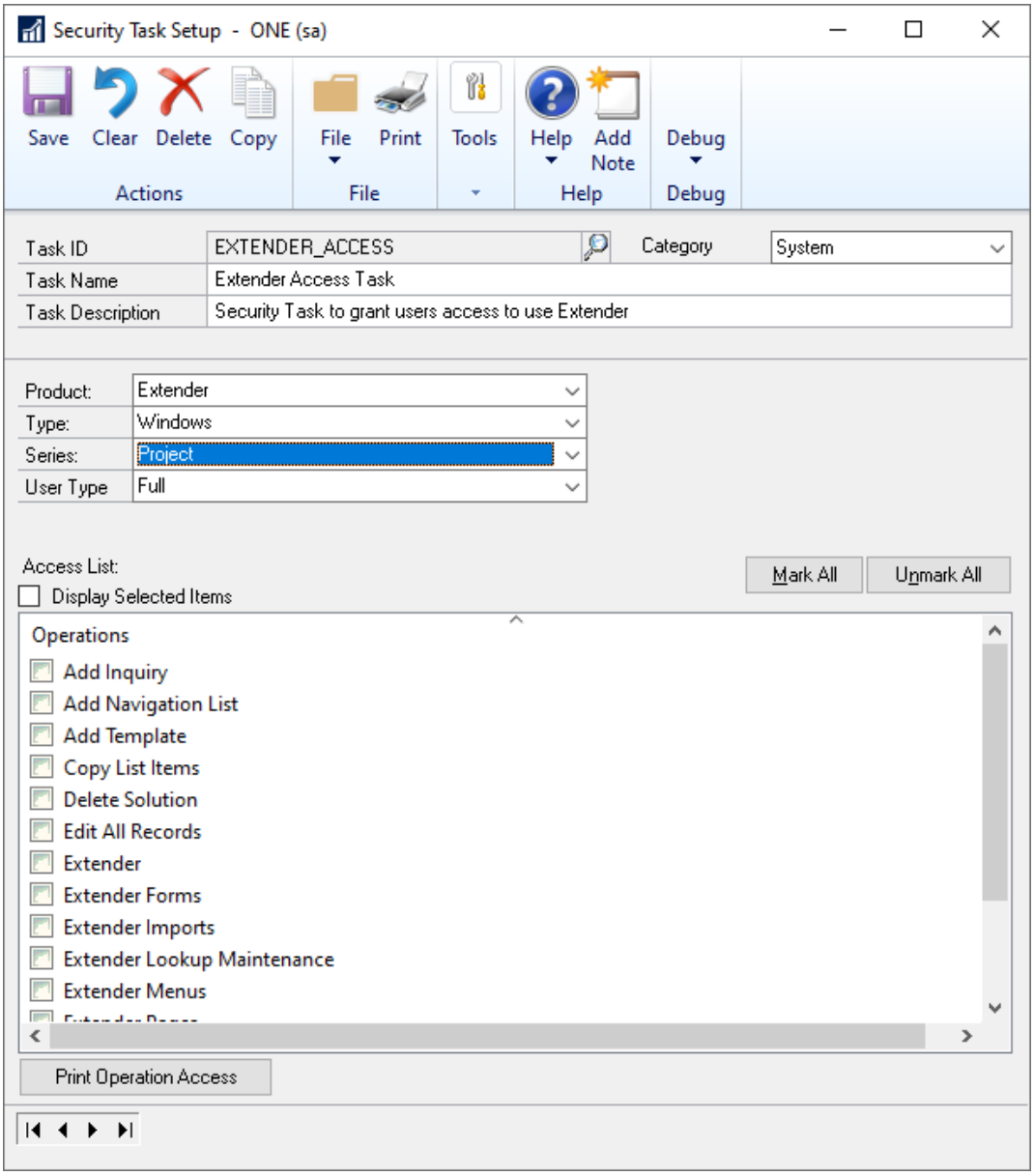
Enter topic text here.

Adding Access to Security Tasks

By default, only users in the Poweruser security role are given permission to create new resources in Extender. Any users not in the Poweruser role will need to be given access through the Microsoft Dynamics GP security roles and tasks.

To create an Extender security task:

1. Open the Security Task Setup window (Microsoft Dynamics GP >> Setup >> System >> Security Tasks).



2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select Extender as the Product.
4. Select Windows as the Type.
5. Select Project as the Series.
6. Mark the Operations that you want to grant access to in the Access List.
7. Repeat steps 5 and 6 for the System and 3rd Party series.

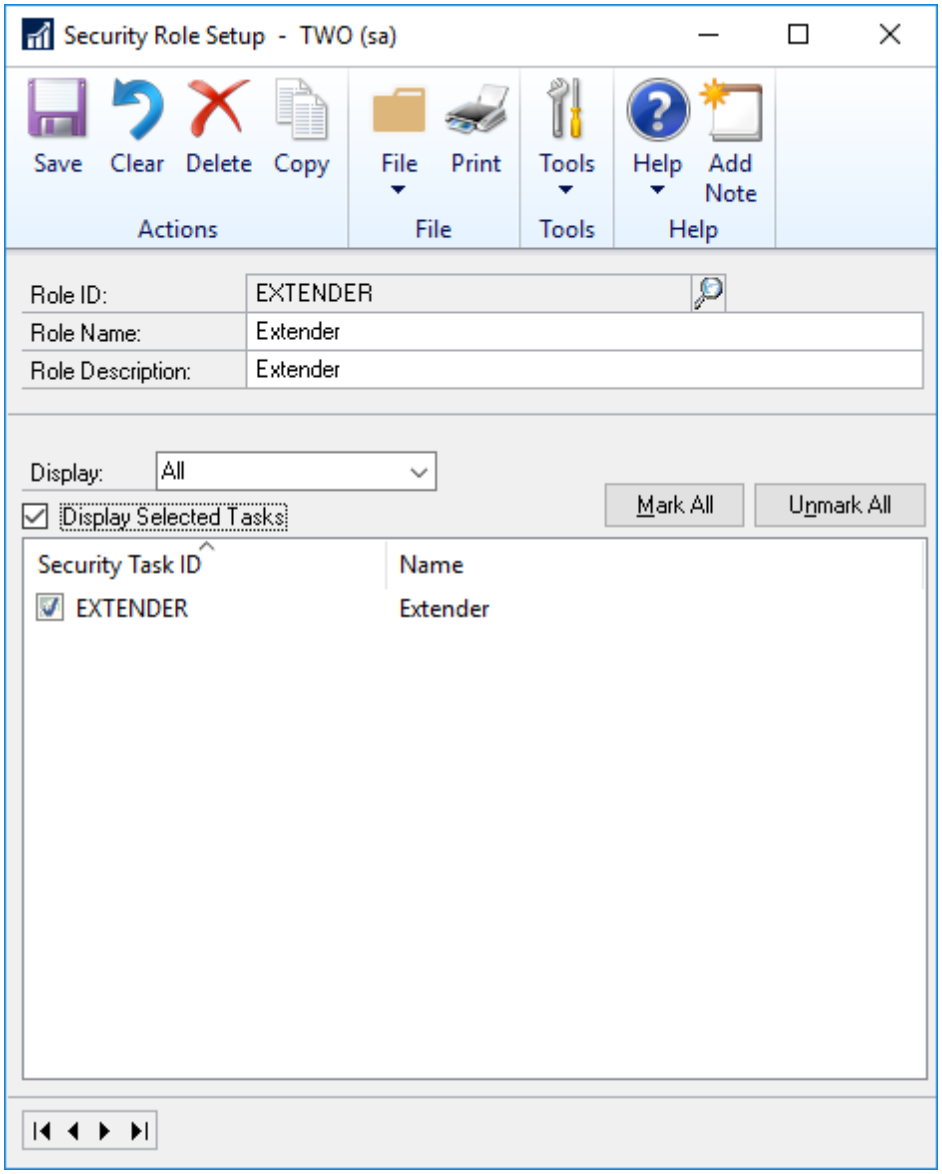
Adding Extender Secuirty Tasks to Security Roles

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. If the security task(s) you assigned the Extender Resources to are new tasks, they will need to be assigned to a security role.

To add a security task to a security role:

1. Open the Security Role Setup window (Microsoft Dynamics GP >> 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.



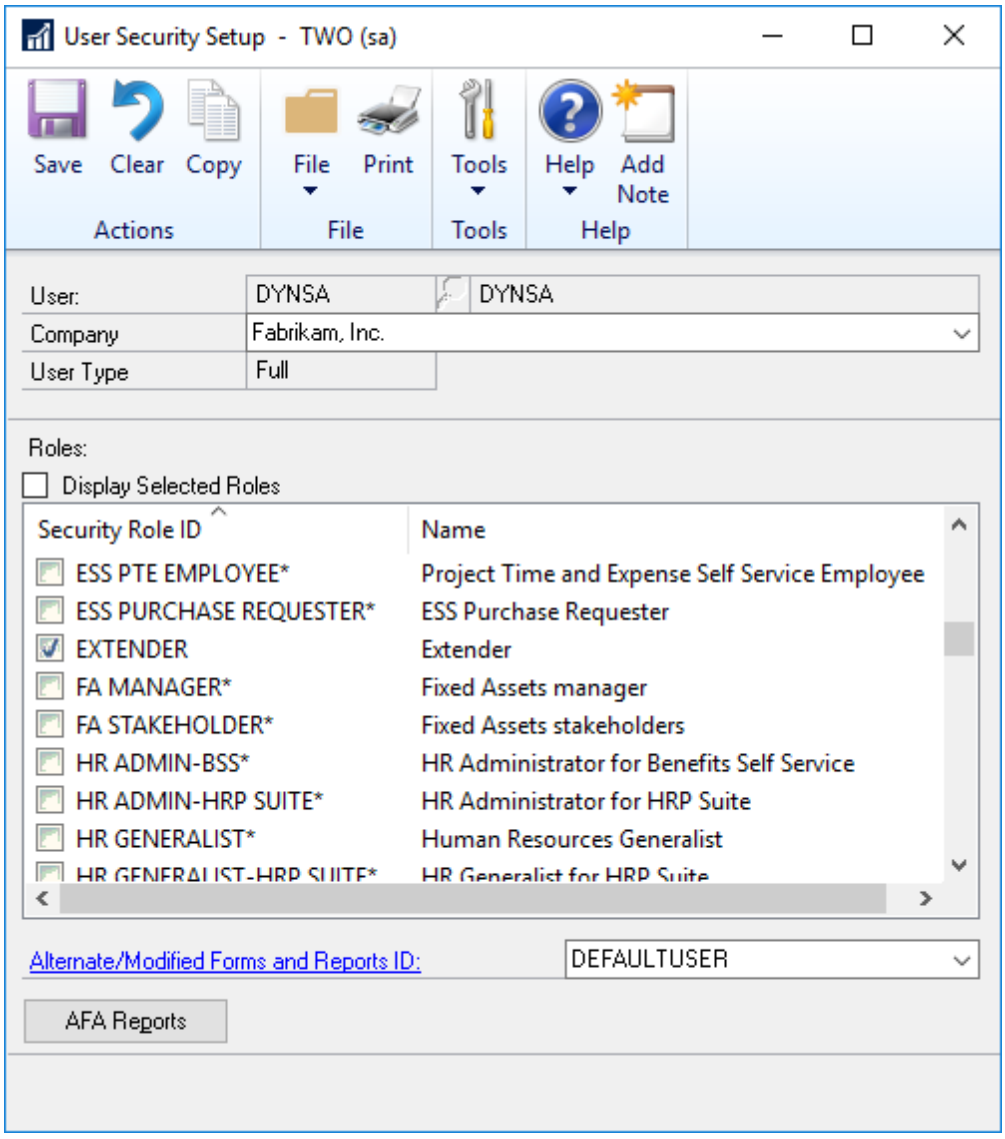
4. Click Save

Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:

1. Open the User Security Setup window (Microsoft Dynamics GP >> Tools >> Setup >> System>> User Security)
2. Enter the user and company that you want to give access to the Extender Security Role.
3. Check off the Role(s) that you want to give the user access to.



4. Click Save.

Access to Use Resources

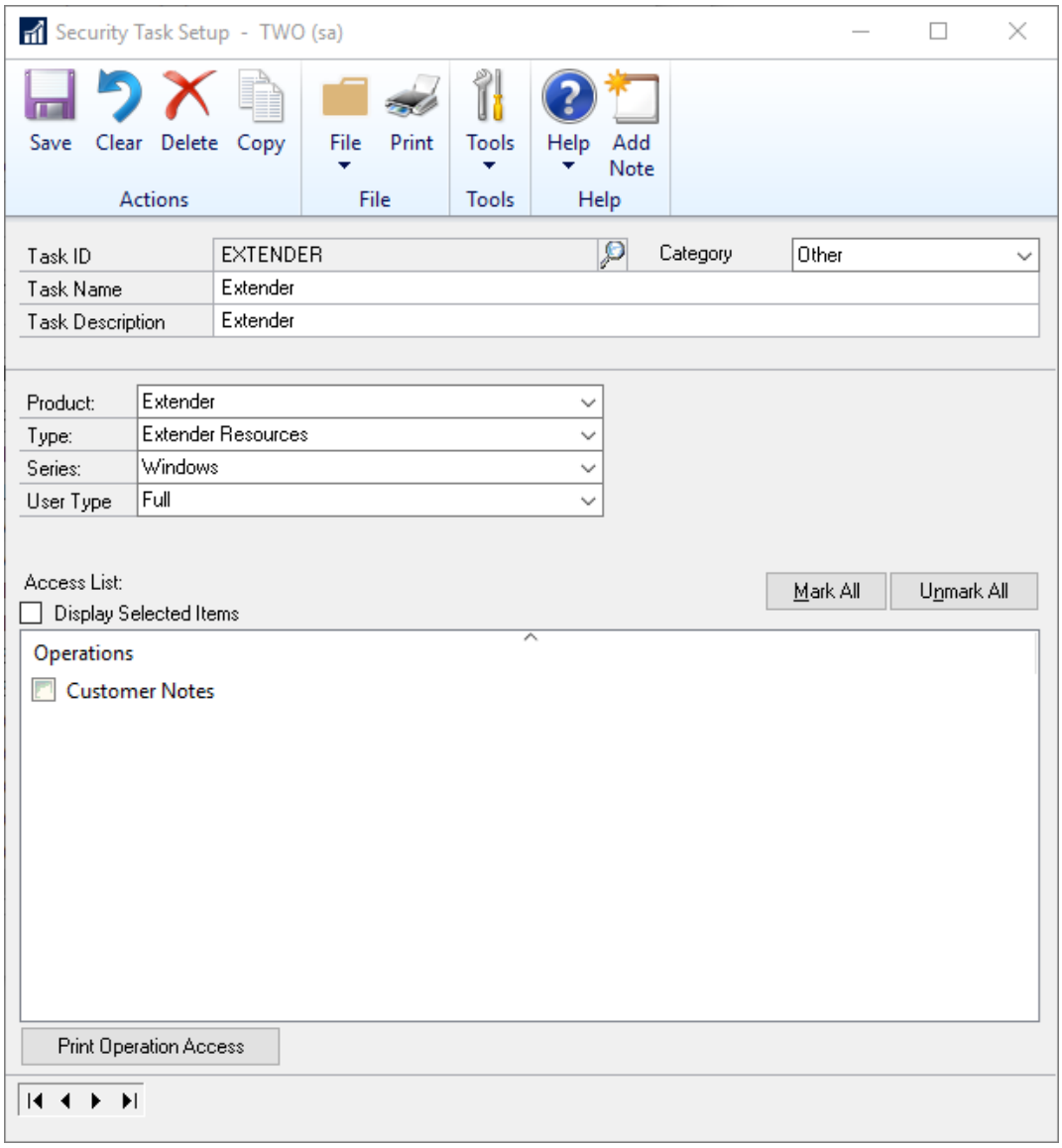
Enter topic text here.

Adding Resources to Security Tasks

When you have created a new Extender resource, you can add it to a new or existing Microsoft Dynamics GP security task.

To add a resource to a security task:

1. Open the Security Task Setup window (Microsoft Dynamics GP >> Setup >> System >> Security Tasks).



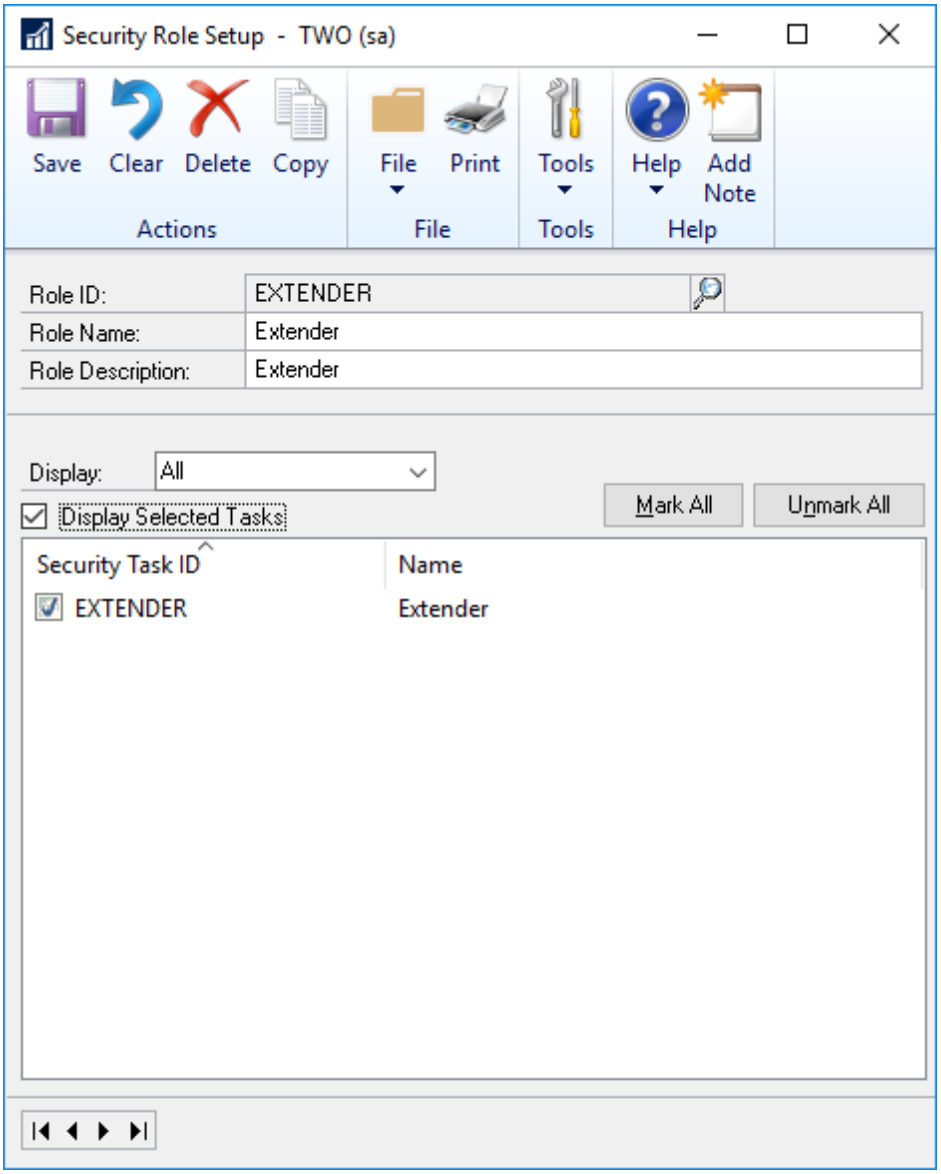
2. Enter the Task ID of an existing task, or enter details for a new security task.
3. Select Extender as the Product.
4. Select Extender Resources as the Type.
5. Select the resource type as the Series.
6. Mark the resources that you want to grant access to in the Access List.
7. Repeat steps 5 and 6 for all of the resource types that you want to grant access to.

Adding Extender Security Tasks to 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. If the security task(s) you assigned the Extender Resources to are new tasks, they will need to be assigned to a security role.

To add a security task to a security role:

1. Open the Security Role Setup window (Microsoft Dynamics GP >> 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.



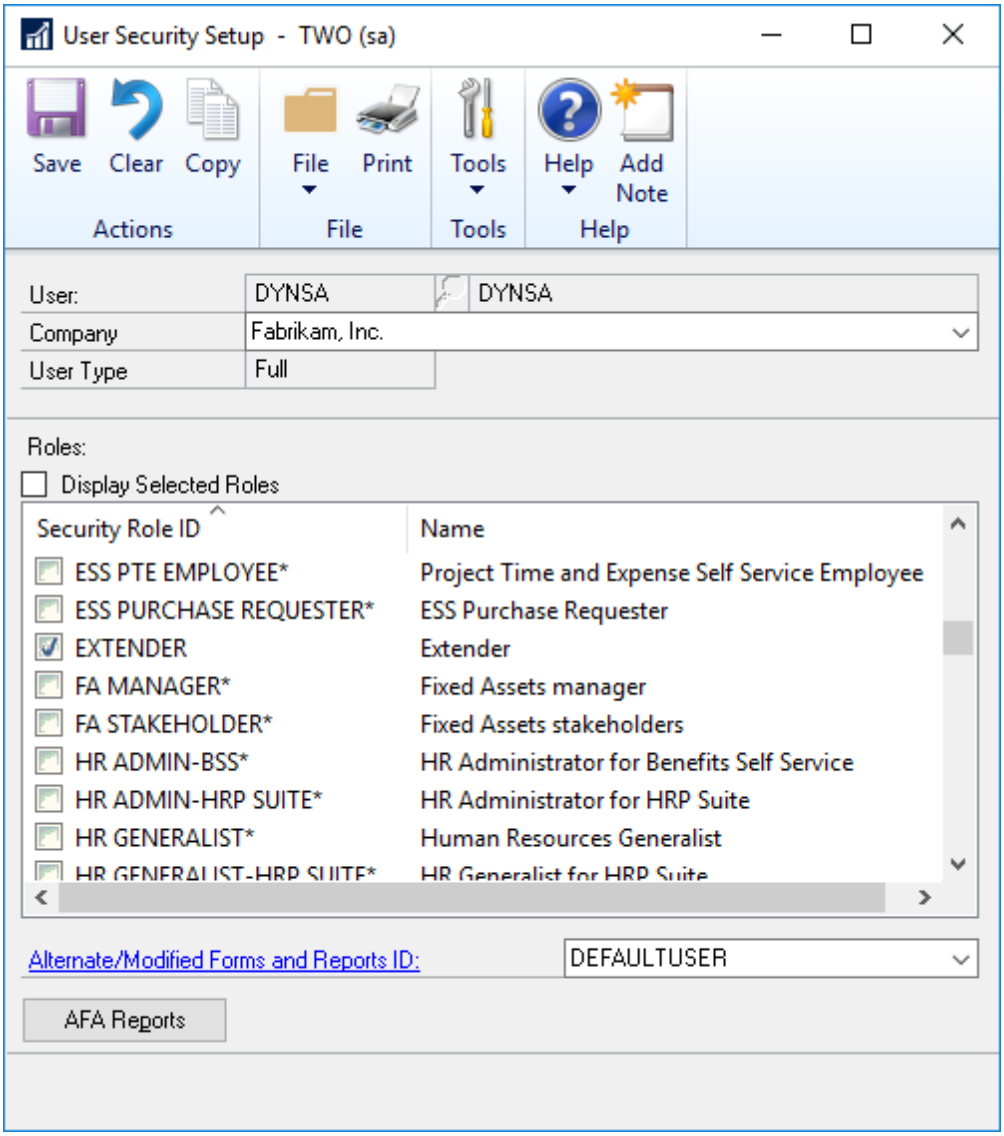
4. Click Save

Setting Individual User Security

After creating the Security Role(s), the last step is to add the Security Role(s) to Individual users.

To set the user security for the role:

1. Open the User Security Setup window (Microsoft Dynamics GP >> Tools >> Setup >> System>> User Security)
2. Enter the user and company that you want to give access to the Extender Security Role.
3. Check off the Role(s) that you want to give the user access to.


User Security Setup - TWO (sa)
Save
Clear
Copy
File
Print
Tools
Help
Add Note
Actions
File
Tools
Help
User:
DYNSA
DYNSA
Company
Fabrikam, Inc.
User Type
Full
Roles:
Display Selected Roles
Security Role ID
Name
ESS PTE EMPLOYEE*
Project Time and Expense Self Service Employee
ESS PURCHASE REQUESTER*
ESS Purchase Requester
EXTENDER
Extender
FA MANAGER*
Fixed Assets manager
FA STAKEHOLDER*
Fixed Assets stakeholders
HR ADMIN-BSS*
HR Administrator for Benefits Self Service
HR ADMIN-HRP SUITE*
HR Administrator for HRP Suite
HR GENERALIST*
Human Resources Generalist
Alternate/Modified Forms and Reports ID:
DEFAULTUSER
AFA Reports

4. Click Save.

Maintenance

This section covers the Maintenance available with Extender.

Edit Values

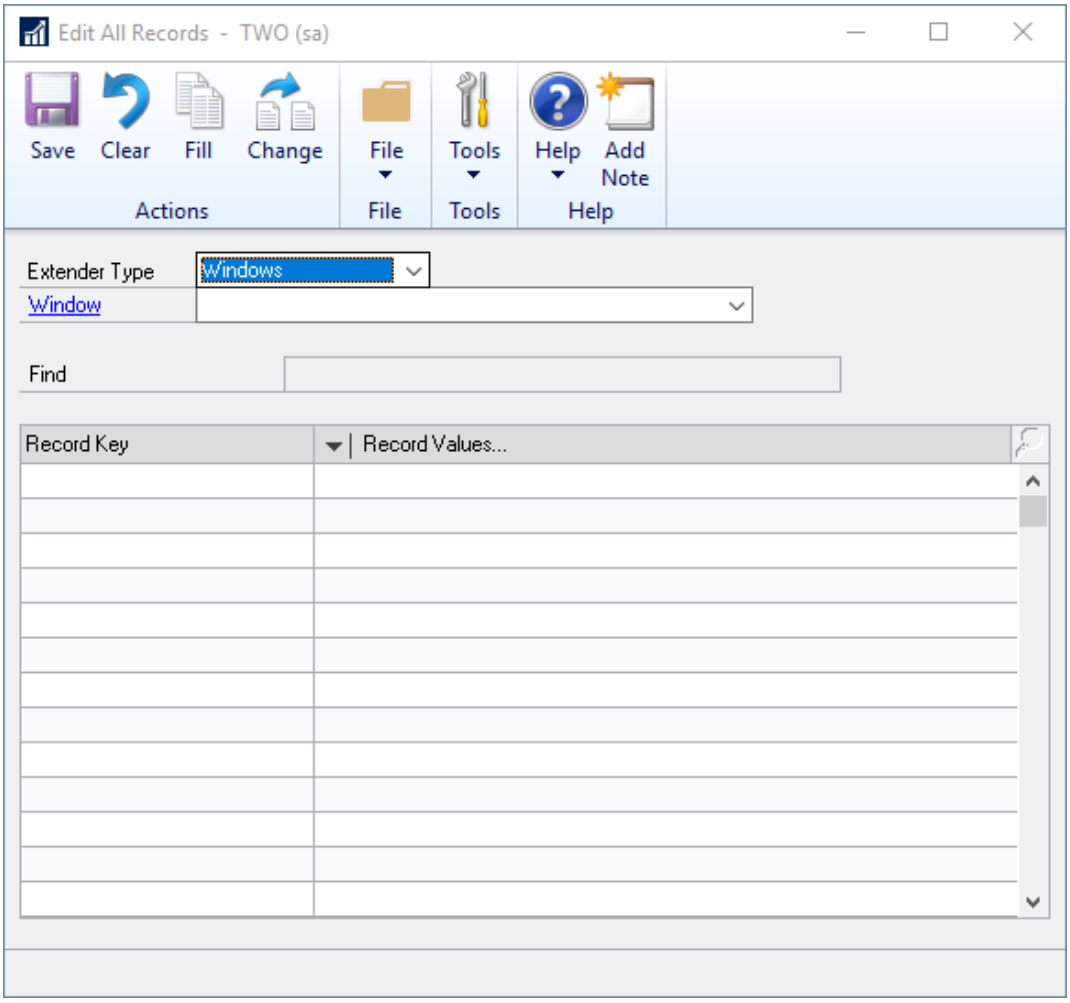
This module describes how to mass modify Extender data.

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 Edit All Records window (Microsoft Dynamics GP >> Tools >> Extender >> Maintenance >> Edit Records).



2. Select the Extender Resource Type and ID that you want to edit the values for.
3. Select the field to edit from the Record Values button list.

4. Enter new values for the field.
5. Click Save to commit the changes.



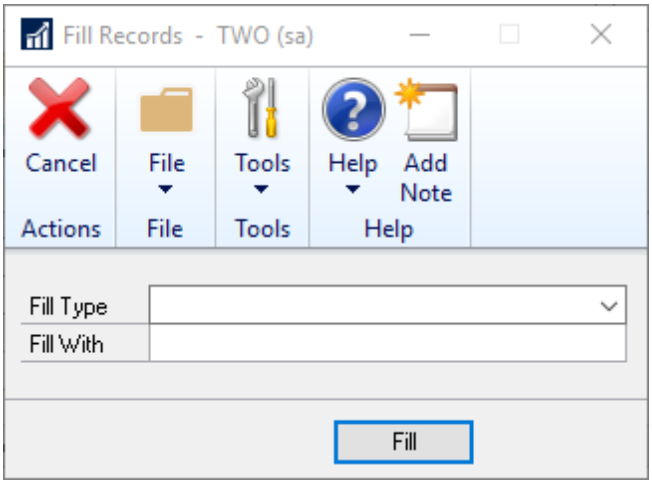
Field values are not changed until the Save button is clicked. If you do not click Save, field values will not be updated.

Filling Values

You can use the Edit Values window to fill the value of a field for all records. Only records that have already been created will be filled. New records will not be created.

To fill field values:

1. Open the Edit All Records window (Microsoft Dynamics GP >> Tools >> Extender >> Maintenance >> Edit Records).
2. Select the Extender Resource Type and ID that you want to edit the values for.
3. Select the field to edit from the Record Values button list.
4. Click the Fill button to open the Fill Records window.



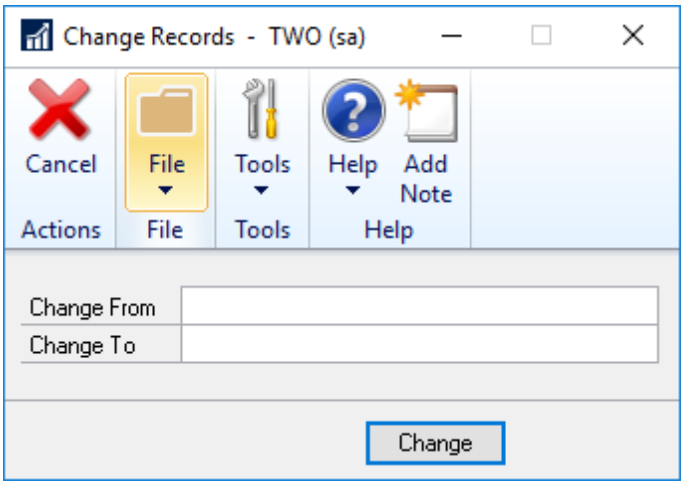
5. Select the Fill Type. Select All Records if you want to update the values of the field for all records. Select Only Empty Records if you only want to set the values of fields that do not already have a value entered.
6. Enter the value to set the field.
7. Click the Fill button.
8. Click Save to commit 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 Edit All Records window (Microsoft Dynamics GP >> Tools >> Extender >> Maintenance >> Edit Records).
2. Select the Extender Resource Type and ID that you want to edit the values for.
3. Select the field to edit from the Record Values button list.
4. Click Change to open the Change Records window.



5. Enter the field value to change the field from and the field value to change to field to.
6. Click Change.
7. Click Save to commit the changes.

Options

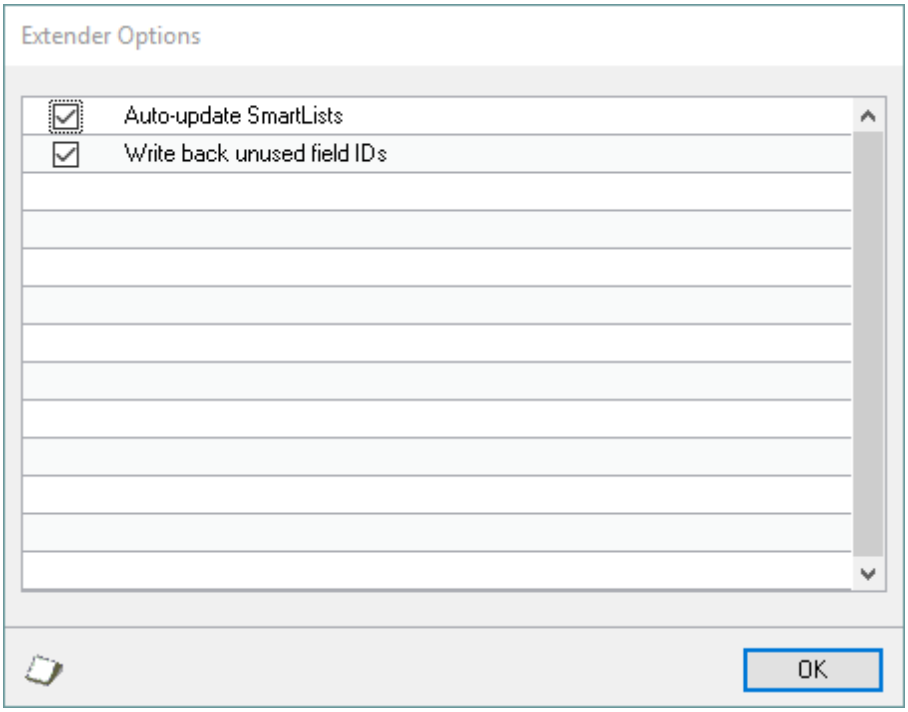
This module describes the options that can be set in Extender.

Setting Options

You can use the Extender Options window to set options for Extender.

To set options:

1. Open the Extender Options window (Microsoft Dynamics GP >> Tools >> Extender >> Options).



2. Mark the options that you want to set and unmark the options that you want to clear.
3. Click OK to save the changes.

Auto-update SmartList

If this option is set, Extender will automatically check for new SmartList objects and SmartList integrations. Additionally, changes in Extender SmartList objects and SmartList integrations are checked 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.

Write Back Unused Field IDs

If this option is set, when a form that is using the auto-increment option is cleared or deleted without saving the data, the next ID value will be reset to the current value.

SmartList Maintenance

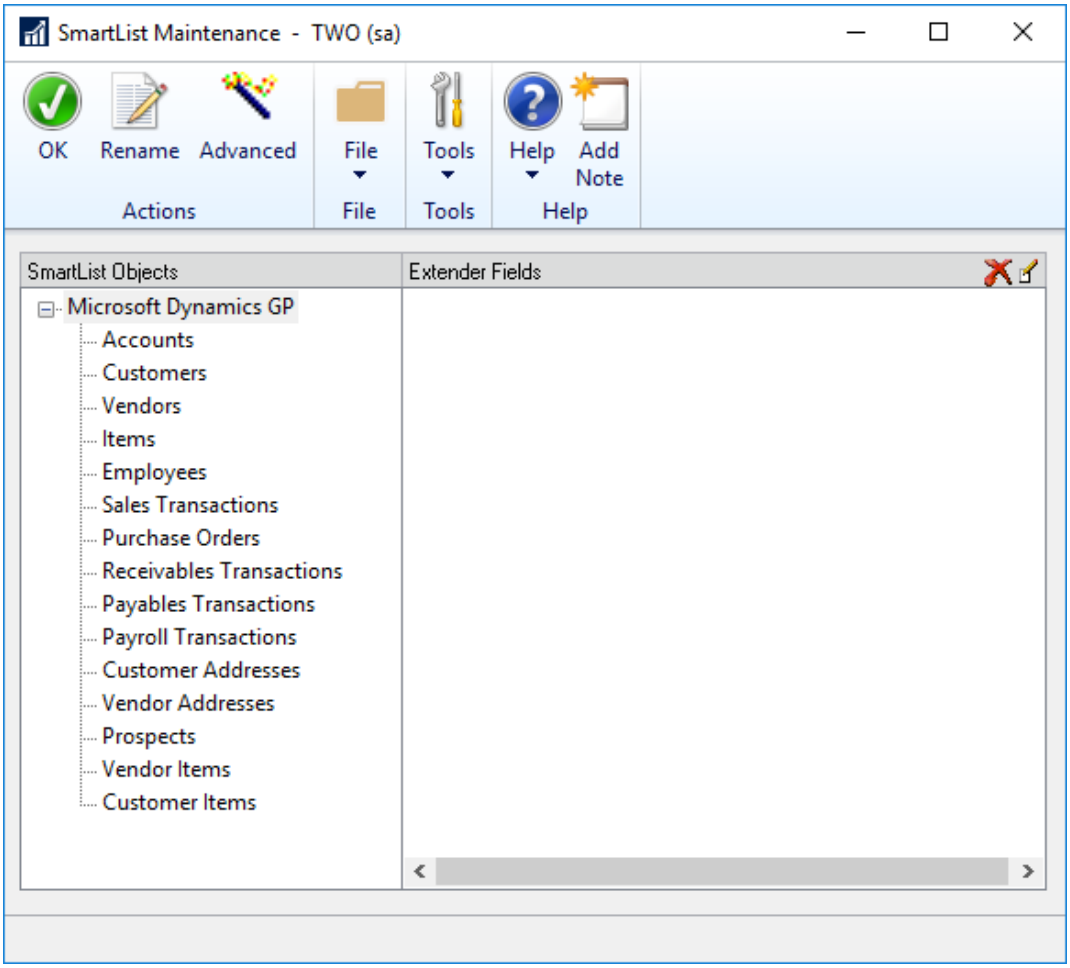
This module describes how to configure the SmartList integration for Extender.

Removing Fields

When you add an Extender Window to a SmartList, all of the fields from the Window are added. If you want to remove any of the fields, you can remove them using the SmartList Maintenance window.

To remove a field:

1. Open SmartList (Microsoft Dynamics GP >> SmartList)
2. Select Extender from the Additional menu.



3. Select the SmartList that you want to modify from the SmartList Objects list.
4. Select the field that you want to remove from the Extender Fields list.
5. Click the Delete button above the Extender Fields list.

Renaming Fields

By default, the fields added to SmartList have the same name as the field name on the Extender Window. If you want to change the name of a field to distinguish it from an existing

field in the SmartList, you can change it using the SmartList Maintenance window.

To rename a field:

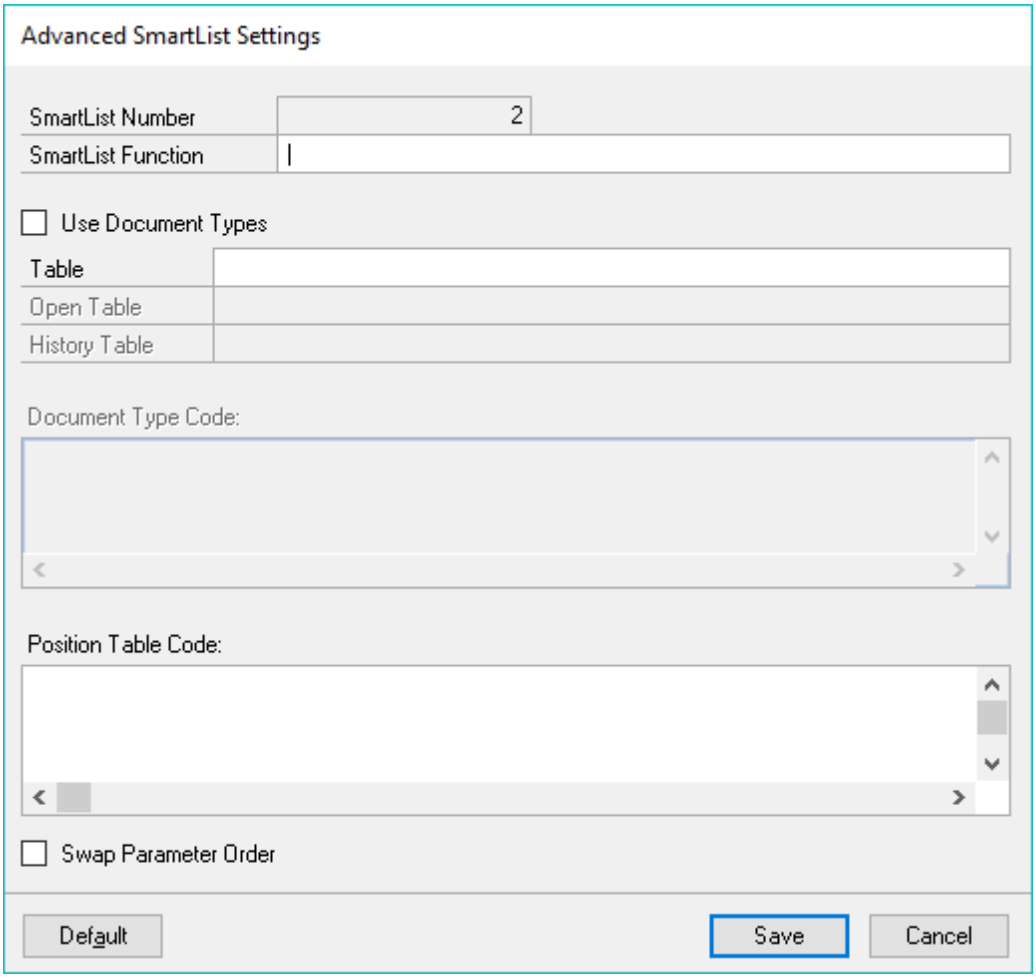
1. Open SmartList (Microsoft Dynamics GP >> SmartList)
2. Select Extender from the Additional menu.
3. Select the SmartList that you want to modify from the SmartList Objects list.
4. Select the field that you want to rename from the Extender Fields list.
5. Click the Rename Field button  above the Extender Fields list.
6. Enter the new name for the field.
7. Click Save.

Advanced Options

The Advanced Options window defines how Extender is linked to each GP SmartList. You should not normally need to use this window.

To set Advanced Options:

1. Open SmartList (Microsoft Dynamics GP >> SmartList)
2. Select Extender from the Additional menu.
3. Select the SmartList that you want to modify from the SmartList Objects list.
4. Click Advanced.



5. Enter new details.
6. Click Save.

Refresh Cache

The Extender cache stores a list of all products, forms and tables. When new products are added or existing products are updated, you may need to refresh the cache to make new forms and tables available to Extender.

Refreshing the Cache

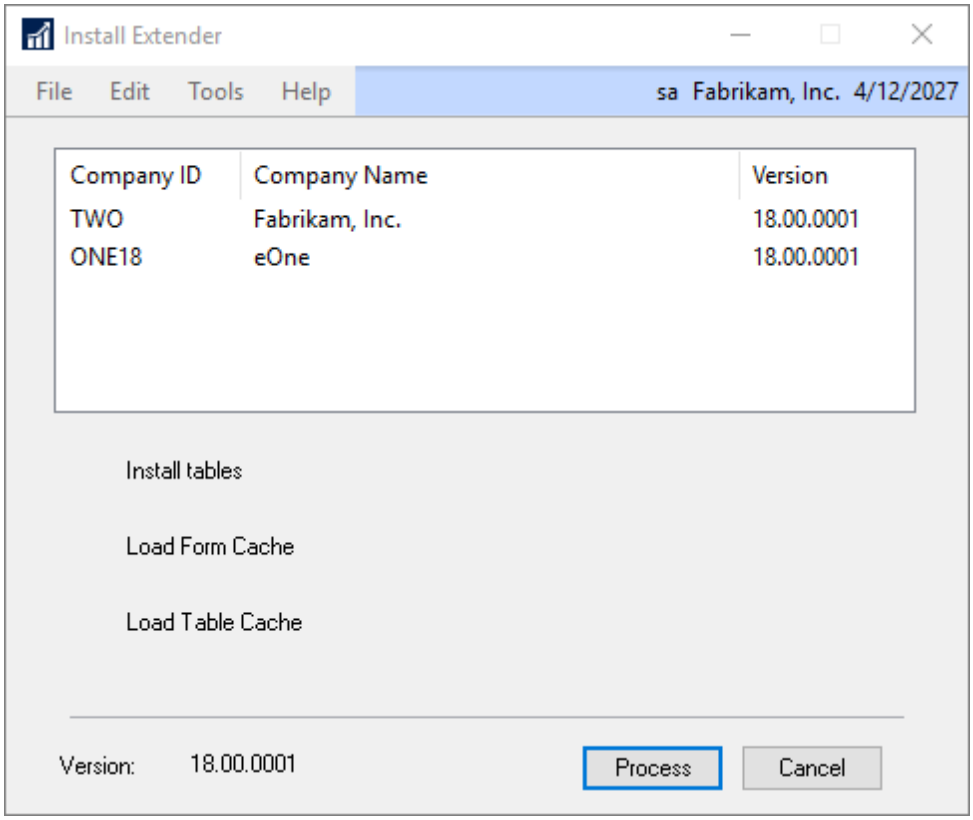
You can use the Install Extender window to update the Extender cache with new products, forms and tables.



It is always recommended that you have backups of your Microsoft Dynamics GP databases before running any maintenance.

To refresh the cache:

1. Select Microsoft Dynamics GP >> Tools >> Extender >> Maintenance >> Install Extender.



2. Highlight one of the Company ID's that you have installed Extender in (one with a version displayed).
3. Click Process.
4. When the processing has completed, click OK on the Install Complete message.

Imports and Exports

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.

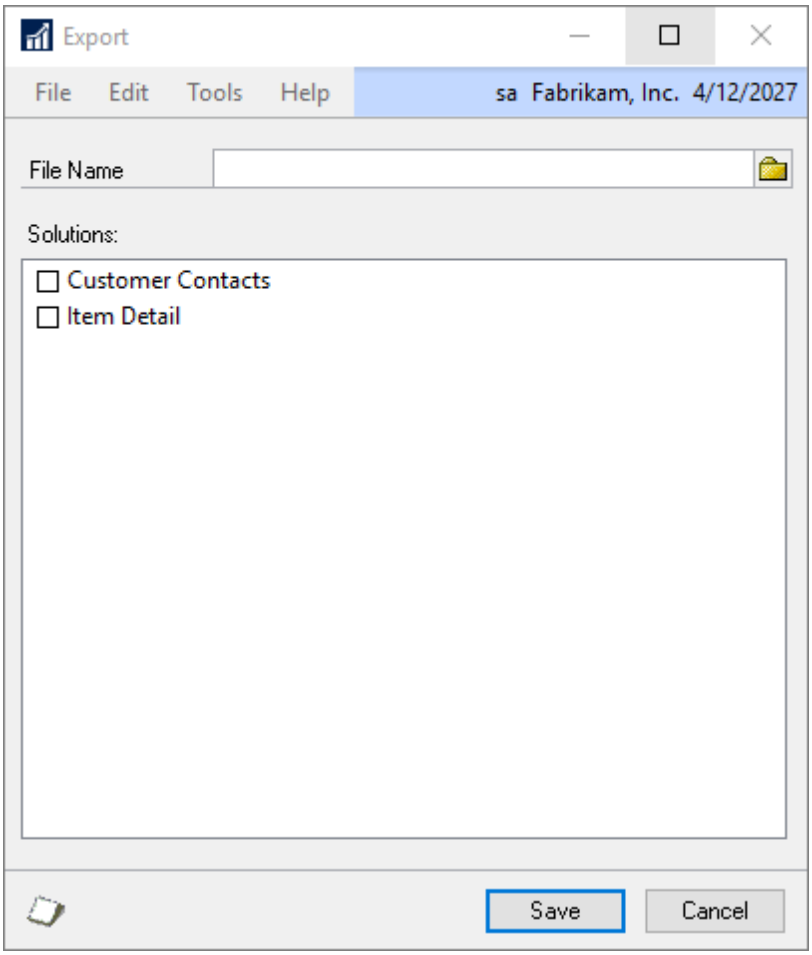
Exporting Extender Resources

Use the Export window to export Extender Solutions, including all of its resources, to an XML file. There are two methods of exporting, Append and Overwrite. When the append method is selected, the selected resource definitions will be added to the end of the entered XML file. When the overwrite method is selected, the contents of the entered XML file will be replaced with the selected resource definitions.

To preserve the integrity of the solution and try to prevent issues when transferring the setups between companies, you will only be able to import and export an entire solution.

To export resources:

1. Open the Extender Export window (Microsoft Dynamics GP >> Tools >> Extender >> Export).



2. Enter the File Name.
3. Select the Export Method.
4. Mark the Extender Solution(s) that you want to export.

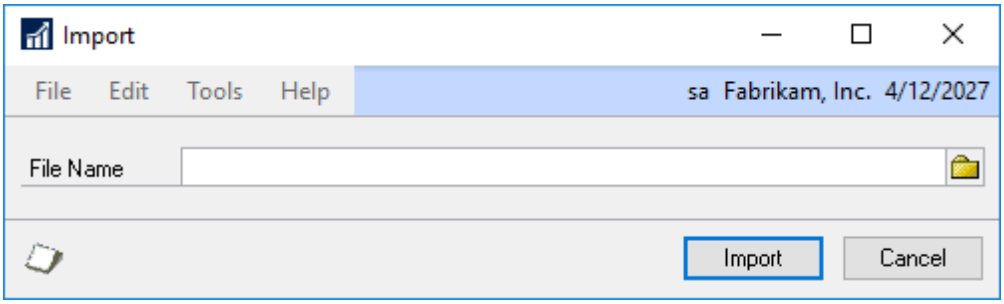
5. Click Save.

Importing Extender Resources

Use the Import window to import Extender Solutions from an XML file.

To import resources:

1. Open the Extender Import window (Microsoft Dynamics GP >> Tools >> Extender >> Import).



2. Enter the File Name that you want to import.
3. Click Import.

Delete Solution

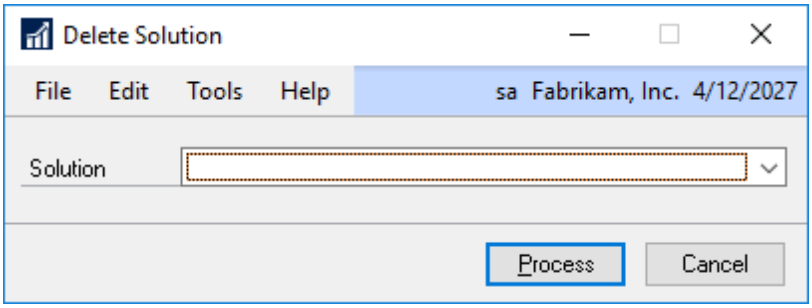
Extender Solutions can be deleted if they are no longer needed.

Deleting an Extender Solution

Use the Delete Solution window to delete Extender Solutions, including all of its resources. Deleting a Solution removes the data that was entered into any of the Extender Resources in the Solution.

To delete a solution:

1. Open the Delete Solution window (Microsoft Dynamics GP >> Tools >> Extender >> Maintenance >> Delete Solution).



2. Select the Solution that you want to delete.
3. Click Process.
4. Click Delete when prompted to verify that you want to delete the Solution.

Adding Data to Report Writer Reports

You can add Extender Window fields to any Report Writer report.



Only the data from the main Extender Windows are supported to add to Report Writer. You cannot add data from the detail on an Extender window, Extender Notes, or Extender Forms to Report Writer reports.

Window Fields with One String Key

Adding an Extender Window field to a 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 position number(s) of the field(s) that you want to add.

The following instructions are for adding fields from an Extender Window with a single key field that is a string data type.

To add an Extender Window field to a Dynamics GP report:

1. Select Microsoft Dynamics GP >> Tools >> Customize >> Report Writer.
2. Select 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.
6. Select the Report in 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. To make it easier to find later, it is recommended that the name reflect the Extender field you are trying to add to the report.
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. Still on the Constants tab, 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. Click Fields and select the Table that contains the Key value for the window. Select the Field that contains the Key value. Click Add.
21. Select the Constants tab and select Integer as the type.
22. Clear the Value field and click Add to add a zero to the calculation.
23. Enter the number of the field from the window in to the Constant field and click Add.
24. Click OK to save the calculated field.
25. Drag the calculated field on to the report. Any other edits to the report such as a label for the field can be done at this time as well.
26. Close the Report Layout window. Click Save.
27. Click OK to close the Report Definition window.
28. Select File >> Microsoft Dynamics GP to return to Microsoft Dynamics GP.
29. Print the modified report to verify that the newly created calculated field is printing the data correctly.



You will need to set security to the modified report before you will be able to view. Refer to the Microsoft Dynamics GP System Setup Guide or help file for more information on setting security to modified reports.

Window Fields with One Numeric Key

Adding an Extender Window field to a 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 position number(s) of the field(s) that you want to add.

The following instructions are for adding fields from an Extender Window with a single key

field that is a numeric data type.

To add an Extender Window field to a Dynamics GP report:

1. Select Tools >> Customize >> Report Writer.
1. Select Dynamics GP as the Product and click OK.
2. Click Reports to open the Report Writer window.
3. Select the report that you want to modify from the Original Reports list.
4. Click Insert to move the report from the Original Reports list to the Modified Reports list.
5. Select the Report in the Modified Reports list.
6. Click Open to open the Report Definition window.
7. Click the Layout window to open the Report Layout window.
8. If the Toolbox window is not already open, select Layout >> Toolbox to open it.
9. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
10. Enter a Name for the calculated field that will become your key.
11. Select the Result Type as String.
12. Add the Key Field to the calculation.
    a. Select the Functions tab and select LNG_STR from the Function list to convert it to a string value.
    b. Click Add to add the function to the expression string.
    c. Click Fields and select the Table that contains the Key value for the window. Select the Field that contains the Key value. Click Add to add to the expression string.
13. You will now have a key field that you can use in the upcoming section. Refer to the following example of what the finished expression might look like:
    Key Calculated Field: LNG_STR(GL_TRX_HDR_WORK.Journal Entry)
14. Click OK to save the calculated field.
15. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
16. Enter a Name for the calculated field. To make it easier to find later, it is recommended that the name reflect the Extender field you are trying to add to the report.
17. Select the Result Type as String.
18. Click the Functions tab and select the User-Defined option.
19. 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.

20. Click Add to add the function to the expression string.
21. Select the Constants tab and select Integer as the Type.
22. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.
23. Still on the Constants tab, select String as the Type.
24. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.
25. Click Fields and select Calculated Fields in the Resources field. Select the Field that contains the Key value created earlier. Click Add.
26. Select the Constants tab and select Integer as the type.
27. Clear the Value field and click Add to add a zero to the calculation.
28. Enter the number of the field from the window in to the Constant field and click Add.
29. Click OK to save the calculated field.
30. Drag the calculated field on to the report. Any other edits to the report such as a label for the field can be done at this time as well.
31. Close the Report Layout window. Click Save.
32. Click OK to close the Report Definition window.
33. Select File >> Microsoft Dynamics GP to return to Microsoft Dynamics GP.
34. Print the modified report to verify that the newly created calculated field is printing the data correctly.



You will need to set security to the modified report before you will be able to view. Refer to the Microsoft Dynamics GP System Setup Guide or help file for more information on setting security to modified reports.

Window Fields with Multiple Keys

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 Dynamics GP report:

1. Select Tools >> Customize >> Report Writer.
2. Select 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.
6. Select the Report in 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. Add the Key Field to the calculation.
    For a numeric field:
    a. Select the Functions tab and select LNG_STR from the Function list to convert it to a string value.
    b. Click Add to add the function to the expression string.
    c. Click Fields and select the Table that contains the Key value for the window. Select the Field that contains the Key value. Click Add to add to the expression string.

    For a string field:
    a. Select the Functions tab and select STRIP from the Function list to remove the trailing spaces.
    b. Click Add to add the function to the expression string.
    c. 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.
14. 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.
15. Repeat step 13-14 for each key field.
16. You will now have a concatenated key field that you can use in the upcoming section. Refer to the following example of what the finished expression might look like:
    Key Calculated Field: LNG_STR(SOP_LINE_WORK.Line Item Sequence) # STRIP(SOP_HDR_WORK.SOP Number)
17. Click OK to save the calculated field.
18. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
19. Enter a Name for the calculated field.
20. Select the Result Type as String.
21. Select the Functions tab and select the User-Defined option.
22. 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.

23. Click Add to add the function to the expression string.
24. Select the Constants tab and select Integer as the Type.
25. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.
26. Select String as the Type.
27. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.
28. Click Fields and select Calculated Fields under Resources. Select the Field that contains the concatenated Key value that was setup using steps 10-17. Click Add to add to the expression string.
29. Select the Constants tab and select Integer as the type.
30. Clear the Value field and click Add to add a zero to the calculation.
31. Enter the number of the field from the Window in to the Value field and click Add.
32. Refer to the following example of what the finished expression might look like:

    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)
33. Click OK to save the calculated field.
34. 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 on to the report and make it invisible.

35. Close the Report Layout window. Click Save.
36. Click OK to close the Report Definition window.
37. 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 System Setup Guide or help file for more information on setting security to modified reports.

Enhancements

- Release 18.09.0157

18.09.0157

This release is a compatibility release for Extender 18.9. It allows Extender to be compatible with Microsoft Dynamics GP 18.9.xxxx. It will contain the same features/fixes as the Extender 18.8 build 18.08.0145 for Microsoft Dynamics GP 18.8 as well as the following.

Problem Reports Fixed in Build 18.09.0157

- CreateIndexesPerformance procedure leaves orphaned SQL connection
- Boxes displaying around field names on column 2 of on extender window
- Exporting a Window and importing it to another company only does the first 15 fields
- Extender Detail window leaves orphaned SQL spids
- Extender doesn't register global actions (triggers) against forms with spaces in them
- Calculated field in scrolling grid of Extender window does not work consistantly
- Key fields for Sales Transaction Inquiry Zoom Line_Scroll do not default properly causing error
- Extender Show Total breaks line total calculation
- Deleting extender window does not delete fields in column 2
- Extender Install and Upgrade Extender should have full row select for company list
- Remove the Extender Solution ID from the Upgrade Extender window
- Extender Enterprise Global Action Condition that restricts to an Account Number / Composite always returns true
- Extender install should default the GP install path to the default GP instance

Release Date: 10/7/2025
Compatible GP Versions: Microsoft Dynamics GP (18.8.xxxx)