

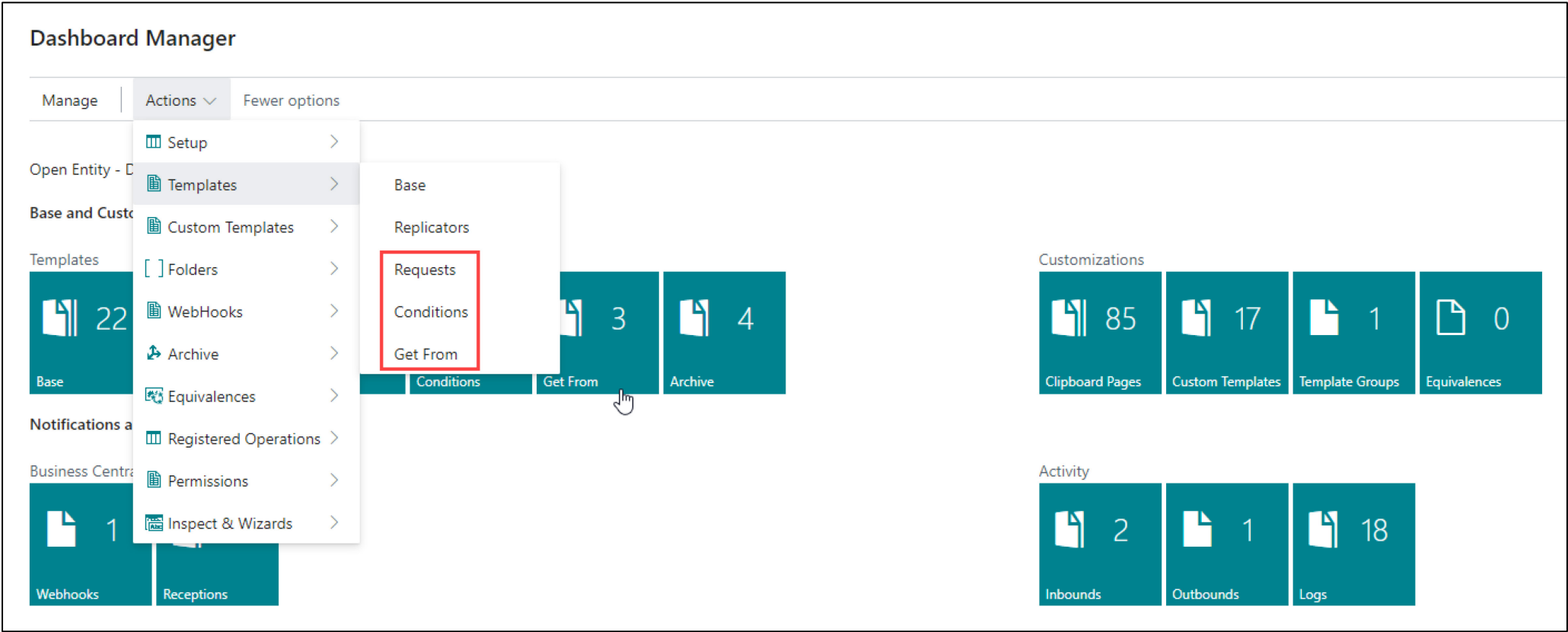
GET-FROM, CONDITIONS, AND REQUESTS

GET-FROM

Get-From cards are mini-templates whose function is to read a SINGLE field from a table and return the value of that field to the template that requested the information. The result of the Get-From will be stored in the field and in the variable, if it exists, of the requesting template.

GET-FROM ACCESS

From the Actions of the 'Control Panel Manager' page or from its cues.



The list of available GetFrom templates will appear for us:

←

OE Get From List

↶

🔍

📄

+ New

📄 Edit List

🗑 Delete

✎ Edit

👁 View

🔗

🔍

☰

📘

Code ↑	Description	Source Table ID	Source Name	Enabled	GetFrom Use
GETCUSTBYVAT	Get customer code searching Vat Reg No.	18	Customer	☑	2
→ GETITEMREE	Get the item code of a vendor	5777	Item Reference	☑	1
GETMYVATREG	Get my vat registration number	79	Company Information	☑	1

Links +

(There is nothing to show in this view)

Notes (1) +

This Getfrom Template is used to get the item references of a product (item)
28/05/2024 • TOLO.SASTRE

To create a new GetFrom, we click on the "New" action, which will display the page to enter the new data.

The page has two sections: General and Lines.

GENERAL SECTION

In the General section, we will set a card code and provide information about the table we want to read ('Source Table ID') and the field whose value we will return to the requesting template (Field ID).

We can also write a brief reminder description, and when we have finished, we will activate the 'Enable' field to make it accessible or executable.

The 'GetFrom Use' field tells us how many Base Templates use this resource.

LINES SECTION

In this section, we filter the table so that it RETURNS A UNIQUE VALUE.

If the configured filter result selects more than one value, it will always return the first value read.

In the Lines section, there are the following fields or columns:

- **Field ID:** field number to filter.
- **Field Name:** the name of the field is for informational purposes only and cannot be edited.

- **Operator:** the comparison operator between the field and its value (Field Value).
- **Field Value:** the fixed or constant value for the field or the name of a variable.
- **‘Is a Var’:** specifies that the Field Value represents a variable instead of a fixed value.
- **Order:** allows us to sort the rows of fields as we see fit.
- **Enable:** enables or disables the filter line.

The following template is designed to obtain a product reference from a supplier. The table to obtain this information is Item Reference (5777), and the field is Reference No. (6).

[illegible]

The filters we apply to this table are 'Reference Type', which will have a constant value of 'Vendor', 'Reference Type No.' which is the vendor code that we assign with a variable called 'vendorNo' by marking the column 'Is a Var' (it's a variable), and 'Item No.', to which we also assign a variable called 'itemVendor', representing the product code.

All filter conditions must be met to obtain a result.

These variables are created from the Base Templates, and the 'GetFrom' template is invoked:

OE Template Base

SALESORDERTOVEDOR

Copy-PasteExport DataExcelRun P

General

TableData · 23

OE Field Lines

Field ID

Field Name

Get From

Field Value

Mapping (Imports)

Ena... Map

Variable Id

Formula

→

1

:

No.

0

☐

vendorNo

OE Template Base

SALESORDERTOVEDOR

Copy-PasteExport DataExcelRun P

General

CodeSALESORDERTO

Source Table ID

TableData · 37

OE Field Lines

Field ID

Field Name

Get From

Field Value

Mapping (Imports)

Ena... Map

Variable Id

Formula

→

3

:

Document No.

0

☐

6

No.

GETITEMREF

0

☐

itemVendor

16

Outstanding Quantity

0

☐

CONDITIONS

The 'Conditions' templates are used to decide whether a configured formula should be processed on a field of a base template. Each Conditions template can have multiple condition lines that are based on the values of the fields in a table.

This page can be accessed by clicking on the Conditions column within the field configuration of a Base Template or through the 'Conditions' option in the Manager Control Panel actions (also from its relevant cue).

To demonstrate its functionality, we will create two ‘Conditions’ cards or templates—one for Customers and another for Customer Product Discount lines—and see how they combine in a base template.

[illegible]

We have created the two conditions templates with a main code and the table on which the conditions must operate, along with a brief informational description and the Enable field activated.

In the lines, we specify which fields must meet a condition using the Field ID, and we define the conditional logic with the pair 'Operator + Field Value' or 'Criteria String'. The field or column 'Logical Operator' allows us to determine whether we want both conditions to be met or only one of them in order to approve or deny the execution of the formula to which they will be linked. The last line field, 'Enabled', enables or disables the processing of the condition line.

In the previous example, we determined that for the CUSTDISCCAMPAIGN condition to be met, the customer must be from Barcelona, Madrid, or Palma de Mallorca, and their sales must exceed an amount of 50,000 (dollars or euros). The logical operator 'And' requires both condition lines to be fulfilled. With the 'Or' operator, it would be sufficient if just one of the conditions is met.

[illegible]

ITEMDISLIMITED will give us a positive result (true) if its conditions are met, specifically if the products are '1896-S' or '1900-S' and their minimum quantity is greater than 2.

COMBINING CONDITIONS IN A TEMPLATE

We have the following example template in which we define the entity 'Sales Line Discount' related to 'Customer'.
The purpose of this template will be to create new discount lines for the items and customers that meet a series of conditions.

OE Template Base

✓ Saved

CUSTNEWDISCOUNTS

Copy-Paste

Export Data

Excel

Run Process

Save File

Archive

Copy Template

Permissions

Vars & Formulas

Get and Enable All Fields

Delete Obsolete/Unexistent Fields

Get Related Tables

General

Code

CUSTNEWDISCOUNTS

Source Table ID

18

Source Name

Customer

Description

Increment discount to a customer

Operation

Insert-Modify

Table Trigger

Permissions

0

Allow Requests

Enabled

Use-Create Equivalence

Folder

DEMO

Template Use

1

Lines

New Line

Delete Line

Use Key

Clear Key

Excel Header

Excel Line

Indent

Target Table ID	Target Table Name	Indentation	Related Table ID	Tag	Operation	Table Trig...	Key	Fields	Formu...	Filters	Fusion	Excel	Ena...	Force
18	Customer	0	18		Insert-Mod...			163	No	1	No	2		
→ 7004	Sales Line Discount	2	18		Insert-Mod...			11	Yes	1	No	11		

Field Relations

New Line

Delete Line

Source Field ↑	Name	Type	Target Field	Name	Type	Enabled
→ 1	No.	Code20	2	Sales Code	Code20	

We access the line where we have the formula defined and click on the Conditions field.

Variables & Formulas

🔍

Edit List

🔗

☰

Line Related ↑	Source Table ID ↑	Field ID ↑	Field Name	Tag	Variable Id	Formula	Ign... For...	Condit...
20000	7004	4	Starting Date			today	<input type="checkbox"/>	No
→ 20000	7004	5	Line Discount %		ldisc	ldisc + myIncrement	<input type="checkbox"/>	Yes
20000	7004	15	Ending Date			today;+3M	<input type="checkbox"/>	No

✓ Saved

+ New

Edit List

Delete

🔗

🔍

☰

Condition

	Condition	Order ↑	Logical Operator
→	CUSTDISCCAMPAING	0	And
	ITEMDISCLIMITED	0	

Detailed Conditions

🔗 New Line

✖ Delete Line

🔗

Field ID	Field Name	Operator	Field Value	Criteria String	Order ↑	Logical Opera...	Ena...
→ 7	City			Barcelona Madrid Palma Mallor...	0	And	✓
62	Sales (LCY)	>	50000		0		✓

Here we will create our list of conditions, using a condition template from the 'Condition' field and building a logic of conditions with the 'Logical Operator' field if we have more than one line.

Below, you can see a subpage (Detailed Conditions) with the detail lines that make up the template we are currently working on.

Note: Since condition templates are reusable, they should not be modified lightly. The technician must review how and to how many templates the changes will affect. The 'Condition Use' field in the list and card of these templates will be helpful to know which base templates are using them.

REQUESTS

Request templates or cards are used solely to request information from another company, environment, or tenant. They send the request to a specific destination base template. The information received will depend on the structure of that external template.

Note: If the destination template does not have the 'Allow Request' field activated, the request will not return any result.

As with the previous options, we can access the Request templates from the Manager Control Panel Actions under the Templates (Plantillas) action or from its cue.

When the list of configured Requests is displayed, we can create a new one by using the New action.

In the first part of the card, we must provide a main code (Code), the Tenant, the Destination Company, and a template from that company. If we properly configured the Tenant in the Setup of the general menu, all this information will be accessible.

[illegible]

The destination template in this example has two tables related by the customer code: 'Customer' and 'Cust. Ledger Entry'.

[illegible]

The configured fields are as follows:

TableData · 18							
Field Lines Search <input type="checkbox"/> Analyze + New Edit List Delete Delete All ...							
Field ID	Field Name	Tag	Order ↑	Series No.			
→ 1	No.		10				
2	Name		20				
86	VAT Registration No.		30				
59	Balance (LCY)		40				

TableData · 21							
Field Lines Search <input type="checkbox"/> Analyze + New Edit List Delete Delete All ...							
Field ID	Field Name	Tag	Order ↑	Series No.	Get From	Field Value	
→ 4	Posting Date		10				
5	Document Type		20				
6	Document No.		30				
17	Amount (LCY)		40				
14	Remaining Amount		50				
18	Sales (LCY)		60				
19	Profit (LCY)		70				

Before executing the Request, we should ensure that we have a default viewer configured in the Setup. If it is blank, we will not see any results.

Series & Others

Custom Template Series · CUSTTEMPLATE

Retain external execut... ☐

Clean Entity Only (pro... ☐

Default Viewer · Card

Allow Deletion by We... ☐

Hide the Tenant Guid ... ☐

Card

Grid

Grid

We configure the data request template (we know the structure consists of the customer table and their transactions) by creating the desired filters, and then we execute it:

OE Request User

✓ Saved

RQCUSTOMERSBALANCE

Run

More options

Code

RQCUSTOMERSBALANCE

Target Tenant

SANDBOXDEV2

Target Company

CRONUS ES

Target Template Code

REQCUSTOMERBALANCE

Request Use

1

Filters

New Line

Delete Line

	Table ID		Table Name	Field ID	Field Name	Operator	Field Value	Filter String	Order ↑	Ena...
→	18	⋮	Customer	7	City			Madrid	10	✓
	18		Customer	59	Balance (LCY)	>=			20	✓
	21		Cust. Ledger Entry	36	Open	=	Yes		30	✓

Note: Later, we will see how we can implement this request so that a user can use it through Customized Templates within their personal Utilities Section in their Control Panel.

Observation: If, upon executing a Request, no screen with data appears, it is possible that our request with the defined filters did not return any results. Therefore, we should check if there is any data that matches the established criteria before searching for a configuration error.

When clicking on the "Run" action, a launcher page will appear where we can fill in the filters or modify them if they were already set.

OE Request Launcher - RQCUSTOMERSBALANCE

Launch

Page

Request

CodeRQCUSTOMERSBALANCE

Target CompanyCRONUS ES

Target TenantSANDBOXDEV2

OE Request Filters Section

New Line

Delete Line

Table ID

Table Name

Field ID

Field Name

Ope...

Field Value

Filter String

Ena...

18

Customer

7

City

Madrid

☒

→

18

Customer

59

Balance (LCY)

>=

0

☒

21

Cust. Ledger Entry

36

Open

=

Yes

☒

Close

By clicking on the "Launch" option, the request will be sent to the destination, and after a few seconds, we should see the result in the viewer, either as a card or grid, depending on the default viewer set up in the previously mentioned setup page.

Results in the Grid Viewer:

And from this same page, we can export the data to Excel if we are interested.

Grid Viewer

Search

Open in Excel

Table	A	B	C	D	E	F	G	H	I
Customer	Customer								
	No.	Name	VATRegistrationNo.	BalanceLCY					
	20000	Company	254687456A	3,515.66					
Cust.LedgerEntry	Cust.LedgerEntry								
	PostingDate	DocumentType	DocumentNo.	AmountLCY	RemainingAmount	SalesLCY	ProfitLCY		
	01/28/23	Invoice	103169	937.51					
	02/25/23	Invoice	103181	1,406.26					
	03/28/23	Invoice	103195	1,171.89					
Customer	Customer								
	No.	Name	VATRegistrationNo.	BalanceLCY					
	40000	Microsoft España - AB		9,224.3					
Cust.LedgerEntry	Cust.LedgerEntry								
	PostingDate	DocumentType	DocumentNo.	AmountLCY	RemainingAmount	SalesLCY	ProfitLCY		

1	Table	A	B	C	D	E	F	G	H
2	Customer	Customer							
3		No.	Name	VATRegistrationNo.	BalanceLCY				
4		20000	Company	254687456A	3,515.66				
5									
6	Cust.LedgerEntry	Cust.LedgerEntry							
7		PostingDate	DocumentType	DocumentNo.	AmountLCY	RemainingAmount	SalesLCY	ProfitLCY	
8		01/28/23	Invoice	103169	937.51	937.51	774.8	170.4	
9		02/25/23	Invoice	103181	1,406.26	1,406.26	1,162.2	255.6	
10		03/28/23	Invoice	103195	1,171.89	1,171.89	968.5	213	
11									
12	Customer	Customer							
13		No.	Name	VATRegistrationNo.	BalanceLCY				
14		40000	Microsoft España		9,224.3				
15									
16	Cust.LedgerEntry	Cust.LedgerEntry							
17		PostingDate	DocumentType	DocumentNo.	AmountLCY	RemainingAmount	SalesLCY	ProfitLCY	
18		02/24/23	Bill	103180	2,229.87	2,229.87	0	0	
19		02/24/23	Bill	103180	1,216.29	1,216.29	0	0	
20		02/24/23	Bill	103180	608.14	608.14	0	0	
21		01/22/23	Bill	103213	2,585	2,585	0	0	
22		01/22/23	Bill	103213	1,410	1,410	0	0	
23		01/22/23	Bill	103213	705	705	0	0	
24		01/27/23	Bill	103214	258.5	258.5	0	0	
25		01/27/23	Bill	103214	141	141	0	0	
26		01/27/23	Bill	103214	70.5	70.5	0	0	
27									