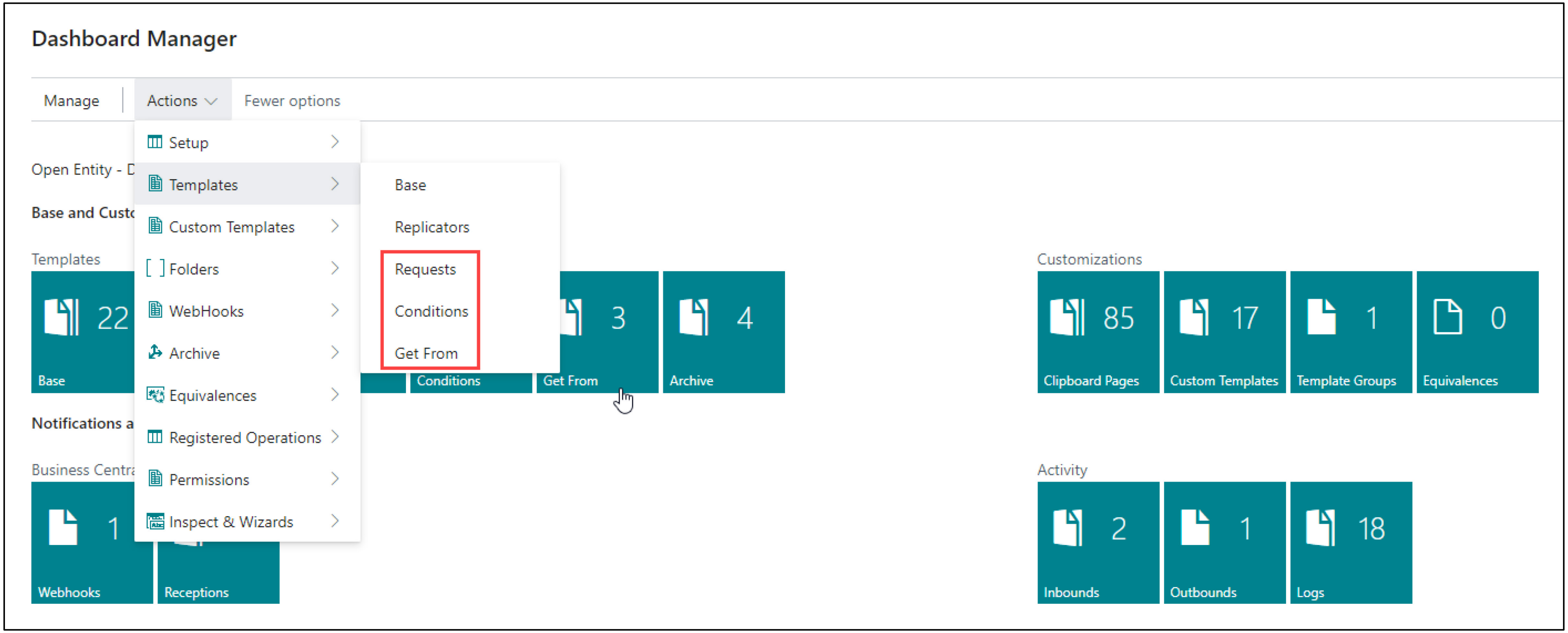
GET-FROM, CONDITIONS, AND REQUESTS

GET-FROM

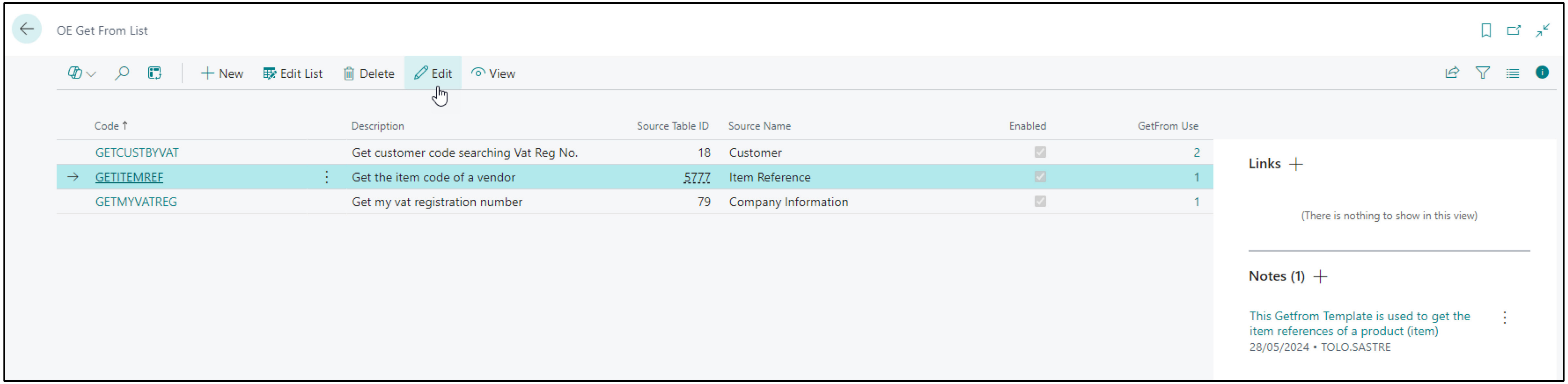
Get-From cards are mini-templates whose function is to read a SINGLE field from a table and return the value of that field to the template that requested the information. The result of the Get-From will be stored in the field and in the variable, if it exists, of the requesting template.

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:



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.

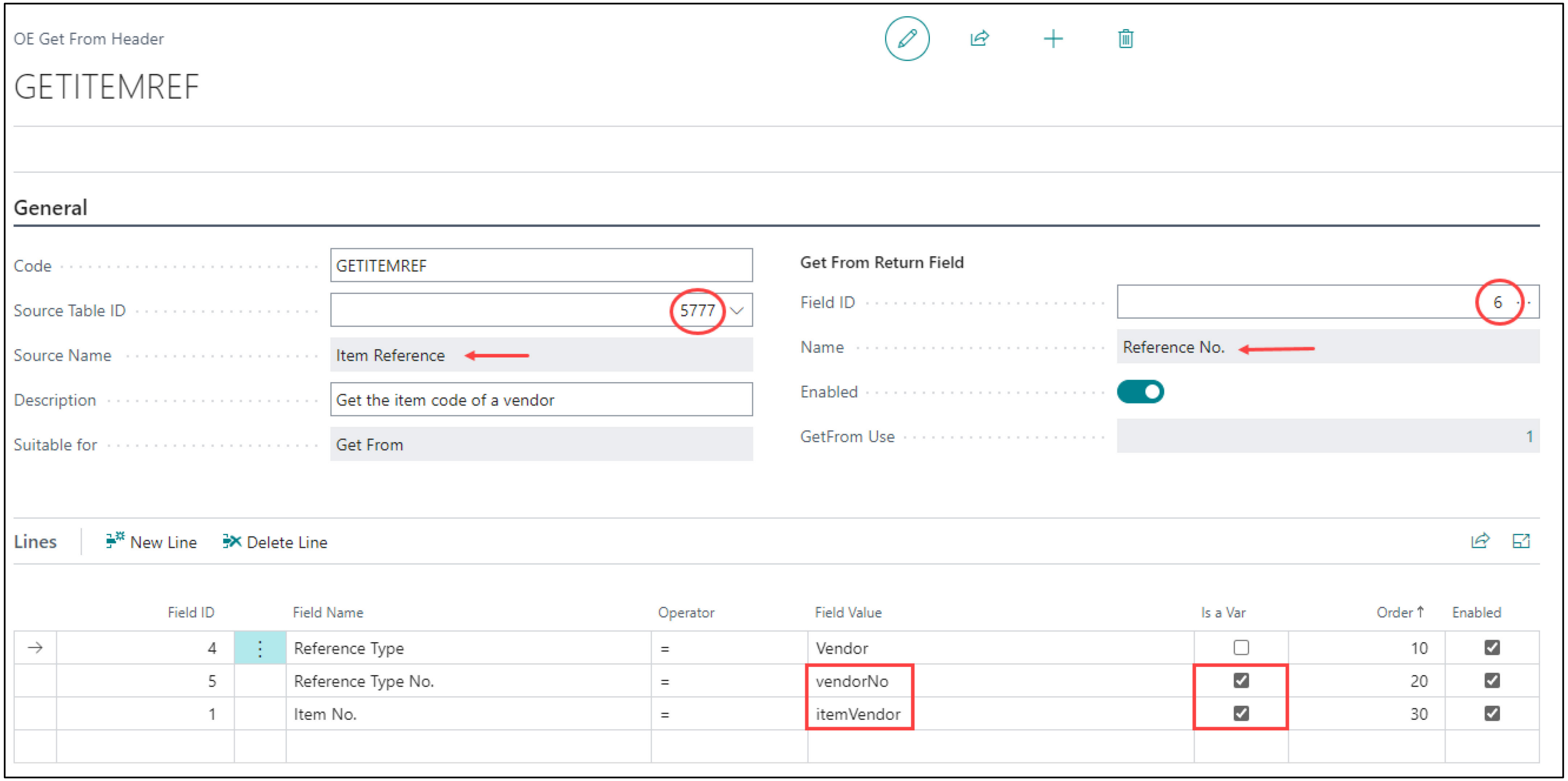
LINES SECTION
In this section, we filter the table so that it RETURNS A UNIQUE VALUE.
If the configured filter result selects more than one value, it will always return the first value read.

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.

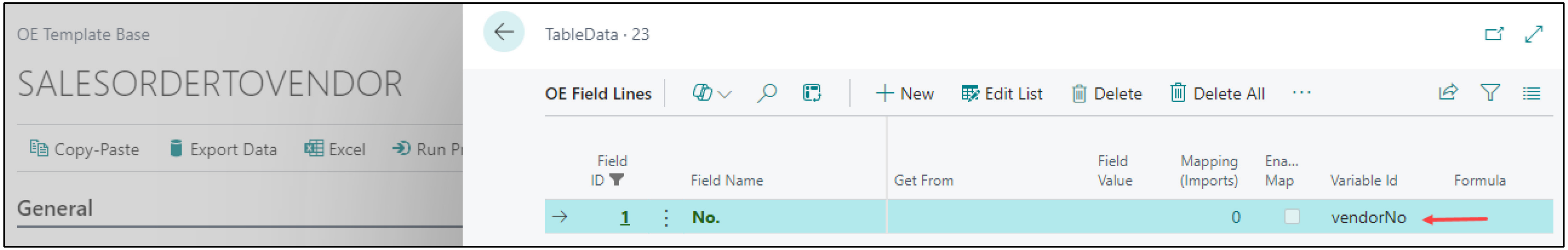
The following template is designed to obtain a product reference from a supplier. The table to obtain this information is Item Reference (5777), and the field is Reference No. (6).

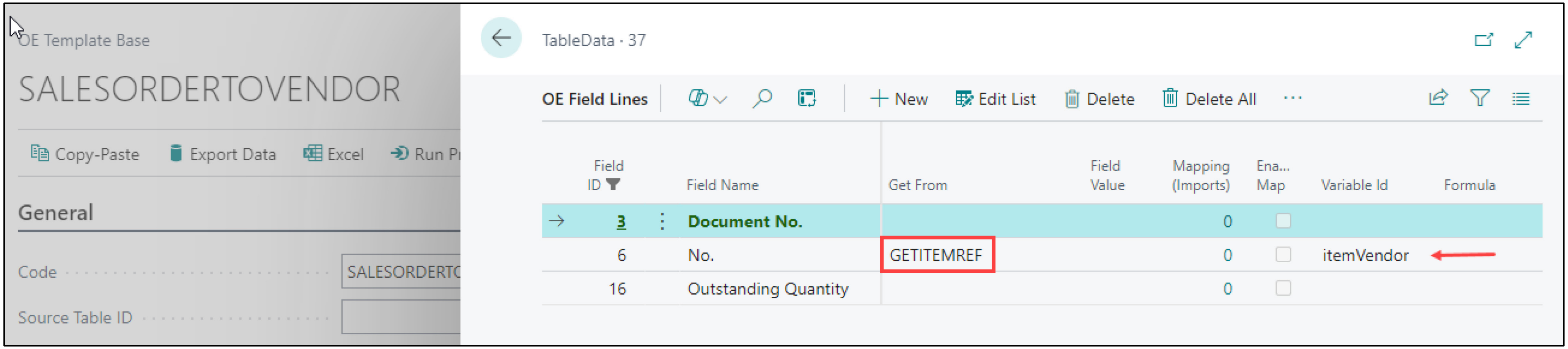


The filters we apply to this table are 'Reference Type', which will have a constant value of 'Vendor', 'Reference Type No.' which is the vendor code that we assign with a variable called 'vendorNo' by marking the column 'Is a Var' (it's a variable), and 'Item No.', to which we also assign a variable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



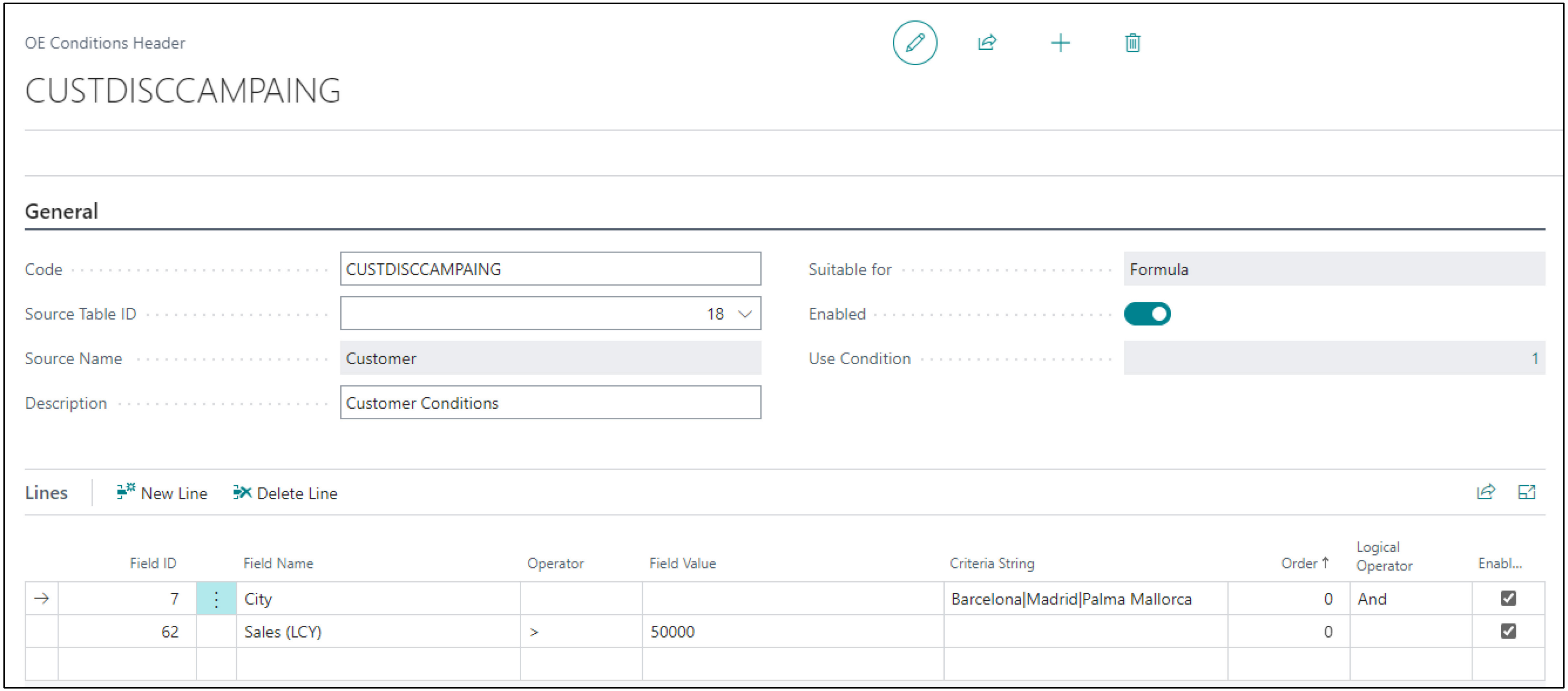


CONDITIONS

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).

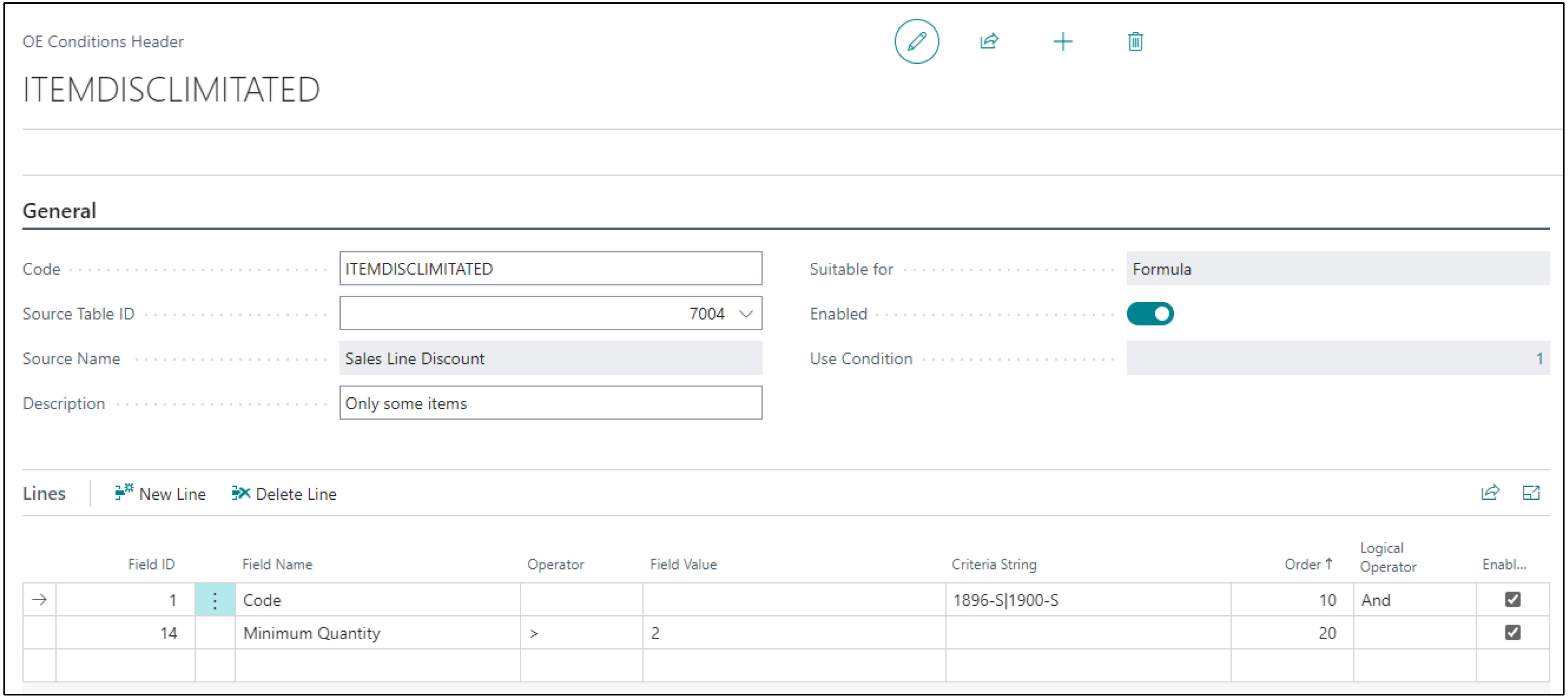
To demonstrate its functionality, we will create two 'Conditions' cards or templates—one for Customers and another for Customer Product Discount lines—and see how they combine in a base template.



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.

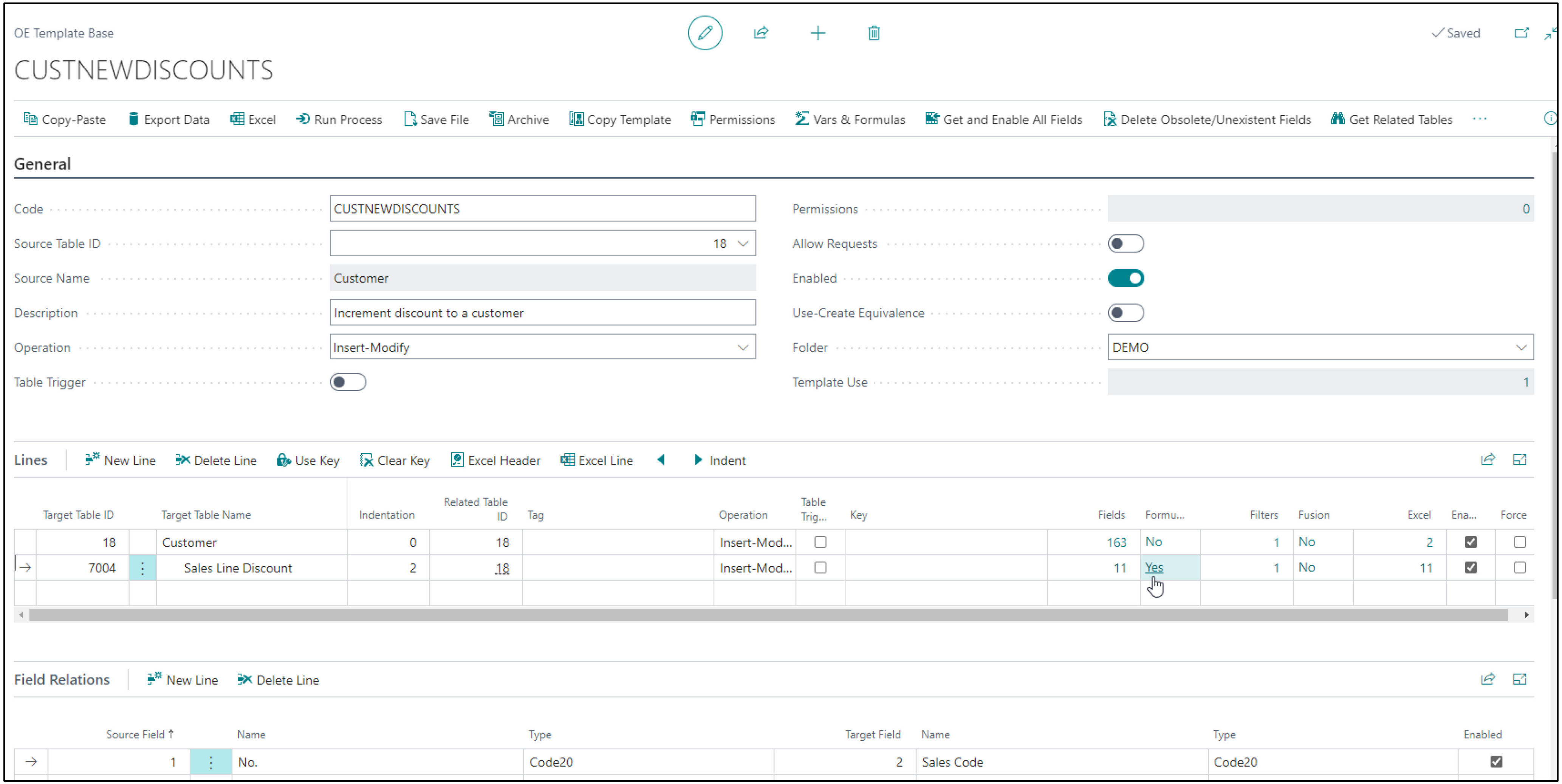
In the previous example, we determined that for the CUSTDISCCAMPAIGN condition to be met, the customer must be from Barcelona, Madrid, or Palma de Mallorca, and their sales must exceed an amount of 50,000 (dollars or euros). The logical operator ‘And’ requires both condition lines to be fulfilled. With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



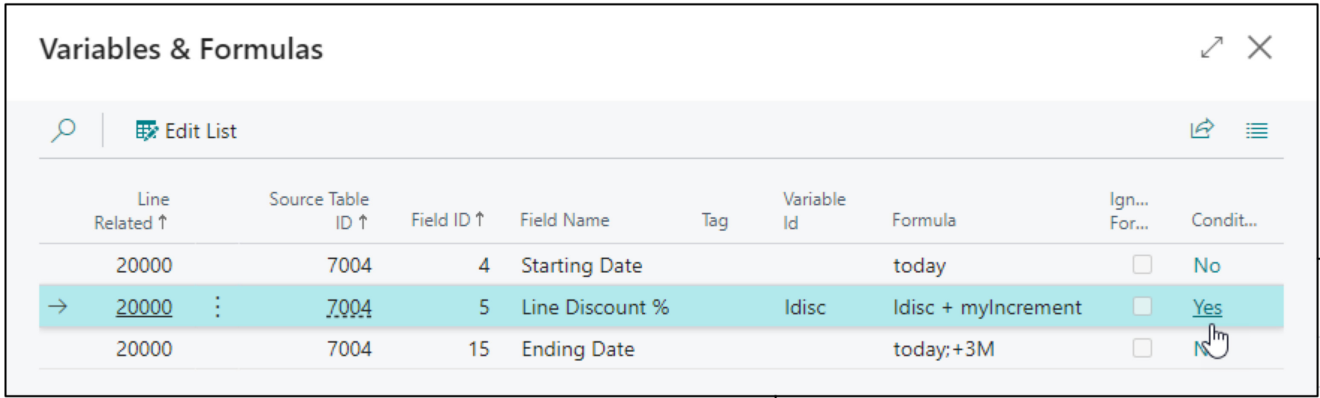
ITEMDISCLIMITATED will give us a positive result (true) if its conditions are met, specifically if the products are ‘1896-S’ or ‘1900-S’ and their minimum quantity is greater than 2.

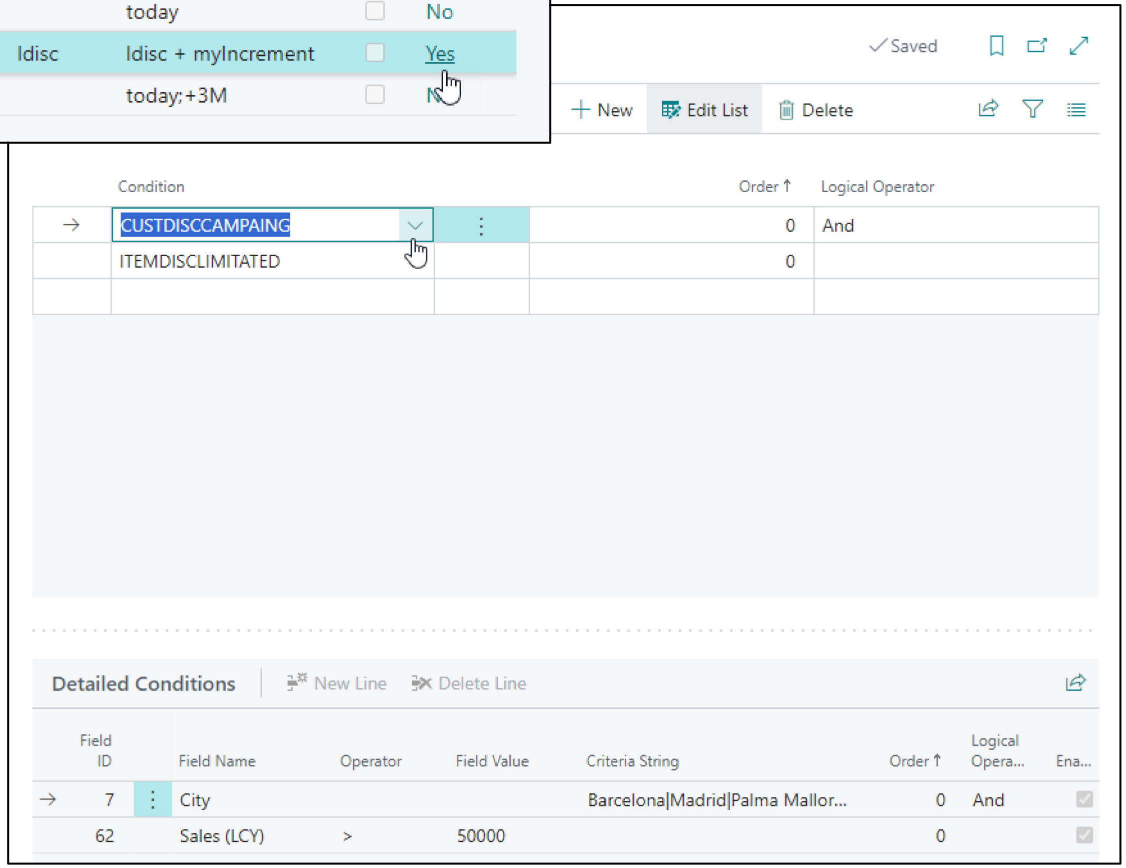
COMBINING CONDITIONS IN A TEMPLATE

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.



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





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

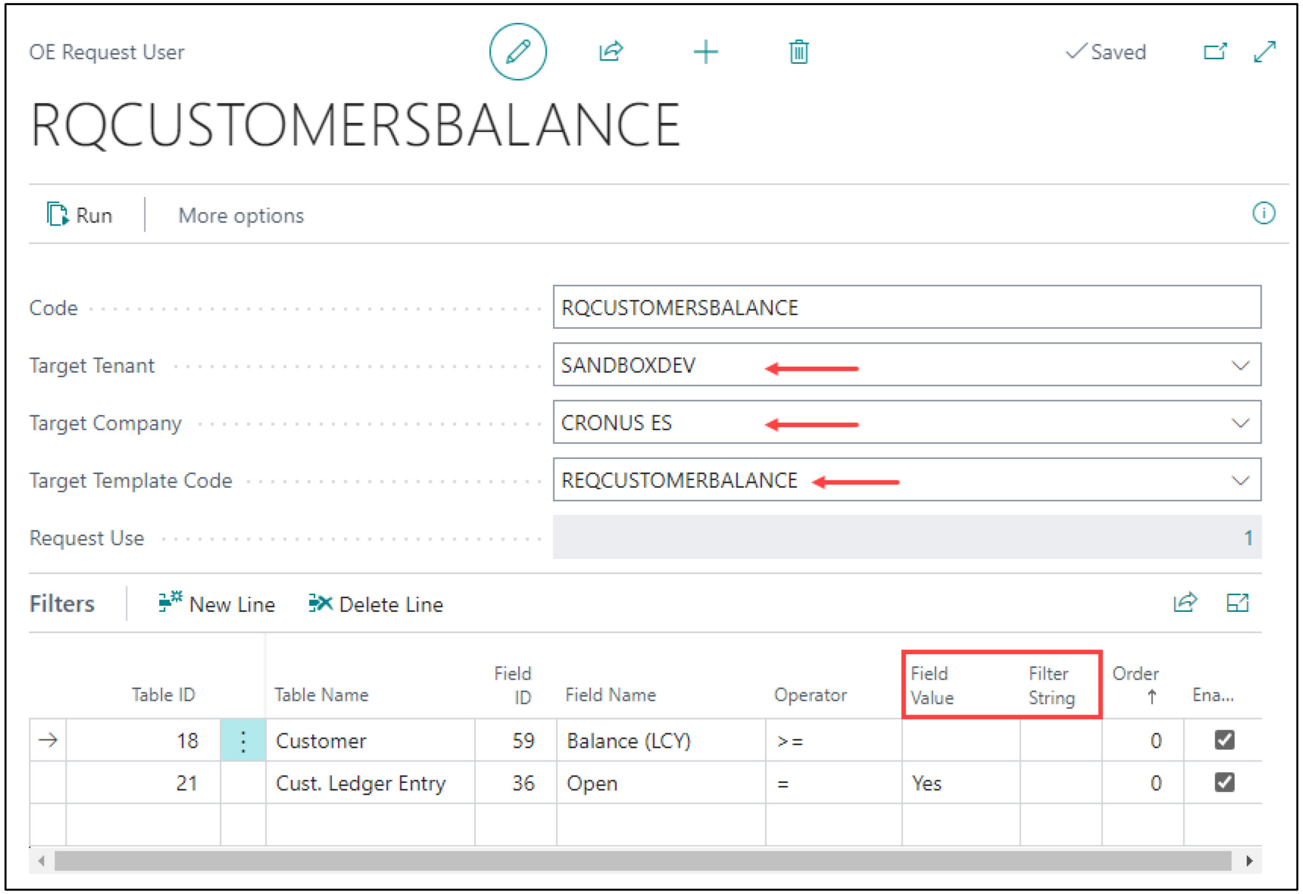
Request templates or cards are used solely to request information from another company, environment, or tenant. They send the request to a specific destination base template. The information received will depend on the structure of that external template.

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

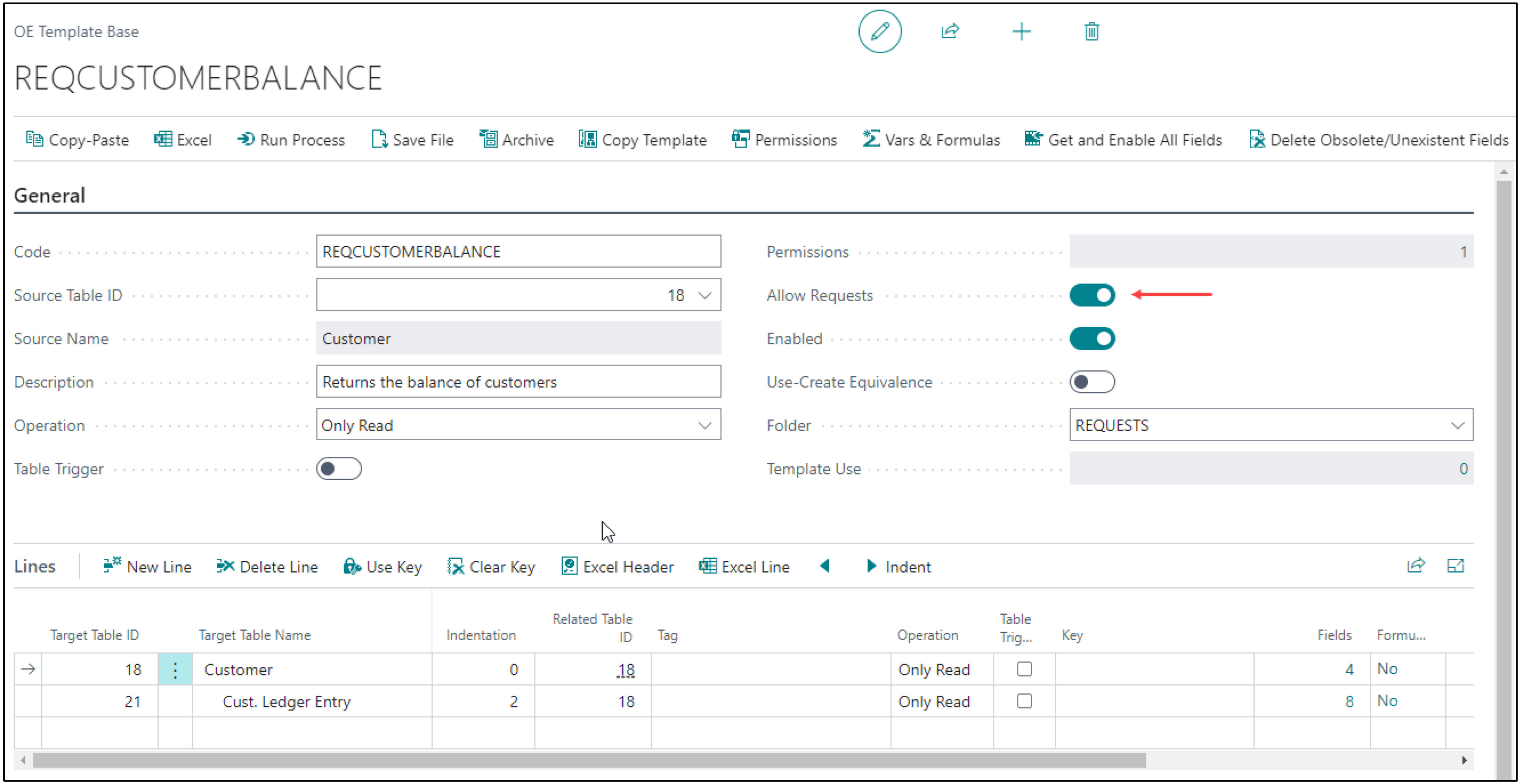
As with the previous options, we can access the Request templates from the Manager Control Panel Actions under the Templates (Plantillas) action or from its cue.

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

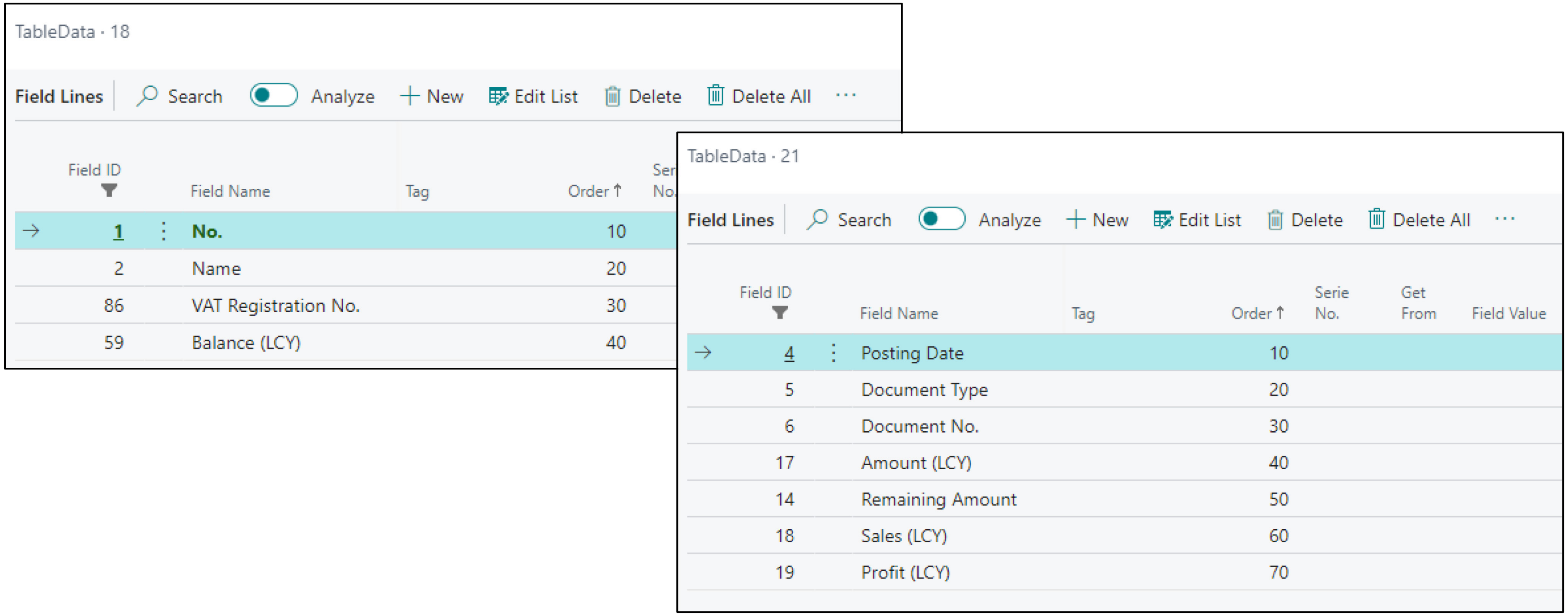
In the first part of the card, we must provide a main code (Code), the Tenant, the Destination Company, and a template from that company. If we properly configured the Tenant in the Setup of the general menu, all this information will be accessible.



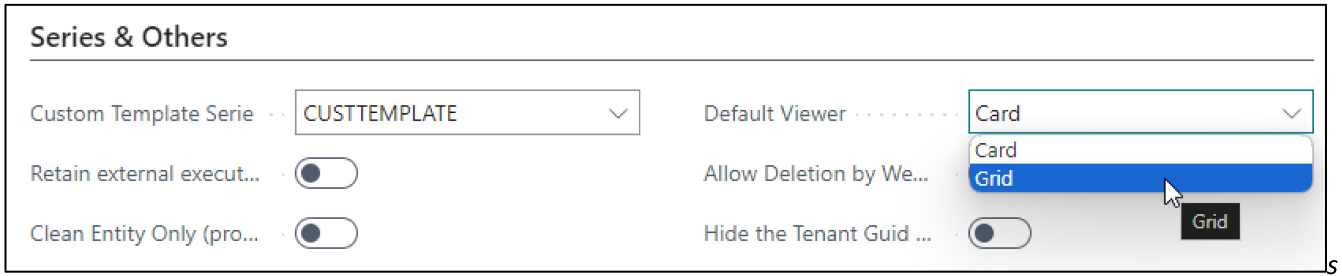
The destination template in this example has two tables related by the customer code: 'Customer' and 'Cust. Ledger Entry'.



The configured fields are as follows:



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.



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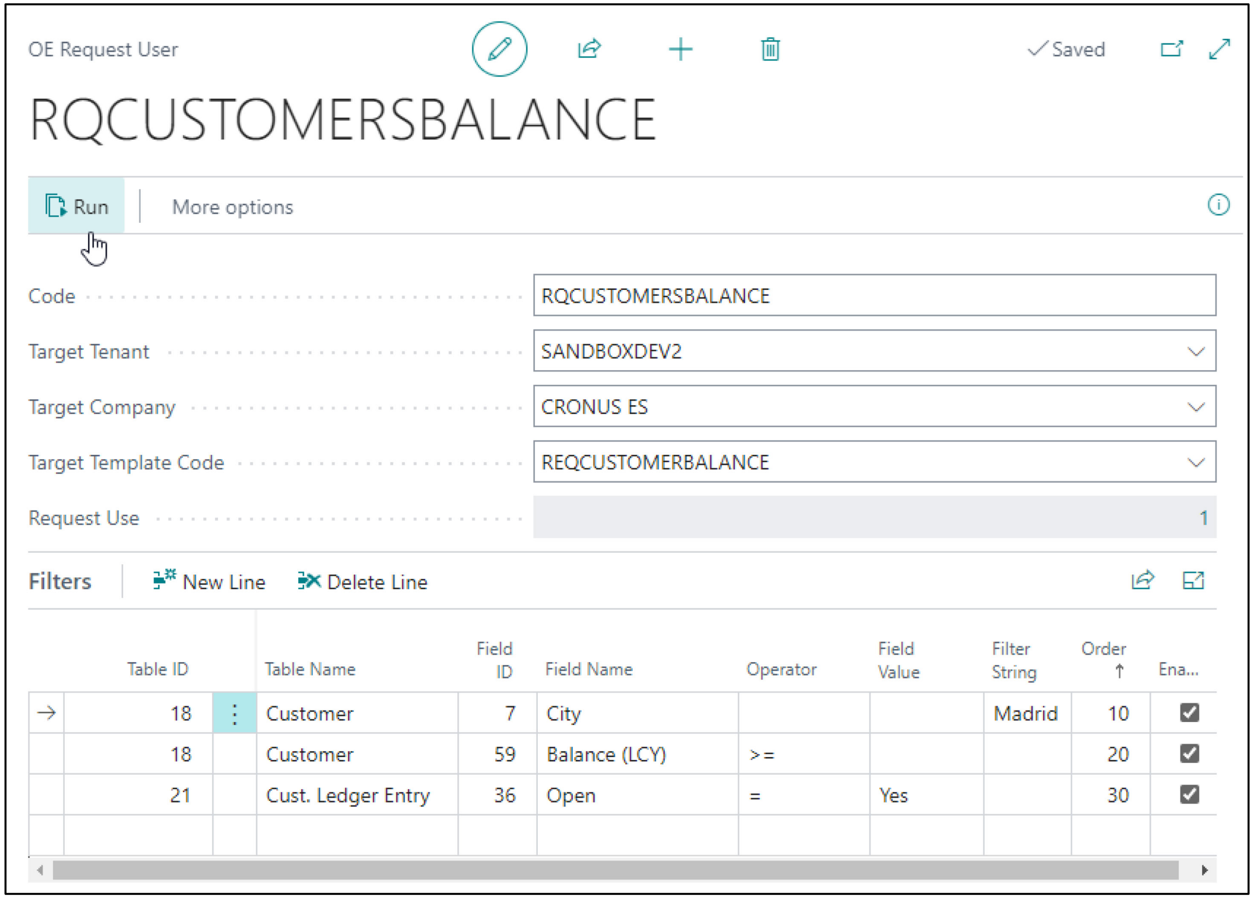
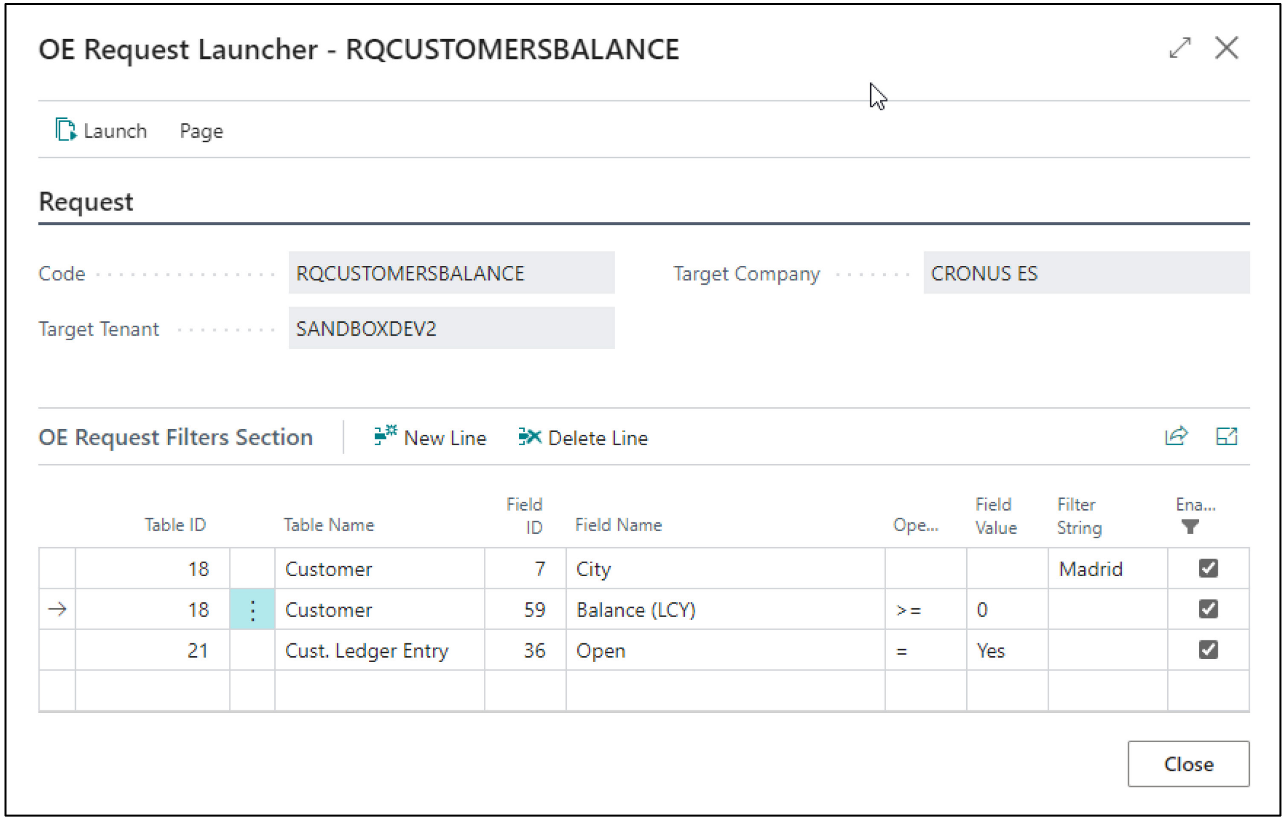
We configure the data request template (we know the structure consists of the customer table and their transactions) by creating the desired filters, and then we execute it:



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.



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.