

BASE TEMPLATES (II)

Following the example from the previous section, we will create several lines related to the **Item** (Product) in the template, such as **Variants**, **References**, **Units of Measure**, and **Substitutions**, for example. Once created, navigate to the **Field Configuration** and create all fields using the '**Get and Enable All Fields**' action from the general template.

Now, we will move these tables to a lower sublevel (indentation) using the **right arrow** button. The button with the **left arrow** does the opposite, moving them back to a higher (parent) level in the hierarchy.

By repositioning these tables to a lower level, we define a **one-to-many** relationship. In our case, for a specific product, we can have various **Variants**, **References**, **Units of Measure**, and **Substitute Products**.

Now, we need to specify which fields are related to each other. For this, we use the **Field Relations** section.

OE Template Base

EXPORTITEMS

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 >

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
27	Item	0	27		Insert-Mod...	<input type="checkbox"/>		211	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 5401	Item Variant	2	27		Insert-Mod...	<input type="checkbox"/>		9	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5777	Item Reference	2	27		Insert-Mod...	<input type="checkbox"/>		10	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5404	Item Unit of Measure	2	27		Insert-Mod...	<input type="checkbox"/>		10	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5715	Item Substitution	2	27		Insert-Mod...	<input type="checkbox"/>		14	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Field Relations New Line Delete Line

Source Field	Name	Type	Target Field	Name	Type	Enabled
→ 1	No.	Code20	4	Item No.	Code20	<input type="checkbox"/>

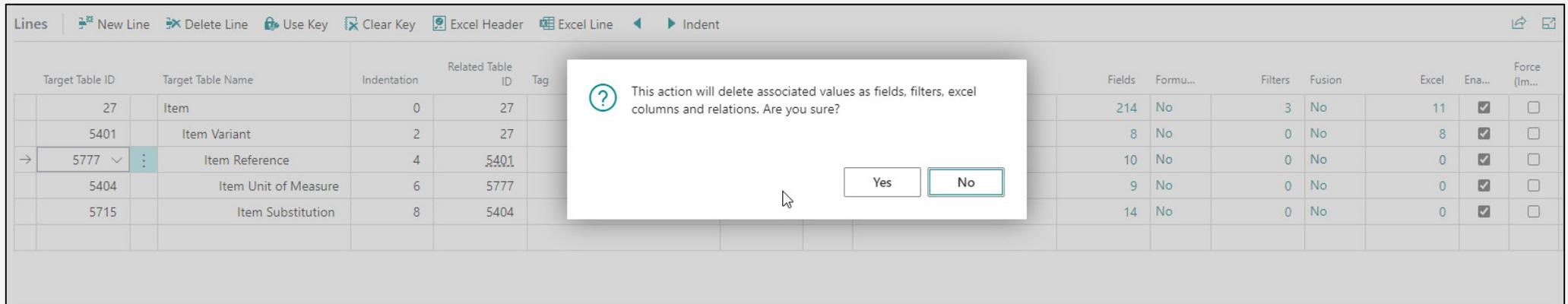
To create a relationship between a parent line and its child line, first, place the mouse over the **child line** you want to relate. Then, create a new row in the **Field Relations** section by selecting the '**Source Field**' (field from the parent line) and the '**Target Field**' (field from the child or current line). In this way, you link the product code with its existing variants. For example, you would relate the '**No.**' field from the '**Item**' table to the '**Item No.**' field from the '**Item Variant**' table.

When you insert this row, the '**Enabled**' field is automatically activated. You need to perform this operation for the other tables as well.

Note: The first line can also be related, and in this case, its relationship is with the table configured in the header. Remember, operations executed with the selector page require this header field to be filled out to display an initial list of data for selection.

LINE EDITING

Modification: If you change your mind and modify the table number in any line, the program will notify you that this action will delete the fields, filters, Excel columns, and relationships associated with it. After performing this action, it's important to review the relationships of any underlying lines that might exist.



The screenshot shows a software interface with a table and a dialog box. The table has columns for Target Table ID, Target Table Name, Indentation, Related Table ID, Tag, Fields, Formu..., Filters, Fusion, Excel, Ena..., and Force (Im...). The dialog box is a white box with a question mark icon and the text: "This action will delete associated values as fields, filters, excel columns and relations. Are you sure?". There are two buttons: "Yes" and "No".

Target Table ID	Target Table Name	Indentation	Related Table ID	Tag	Fields	Formu...	Filters	Fusion	Excel	Ena...	Force (Im...
27	Item	0	27		214	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5401	Item Variant	2	27		8	No	0	No	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5777	Item Reference	4	5401		10	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5404	Item Unit of Measure	6	5777		9	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5715	Item Substitution	8	5404		14	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Modifying the other line fields does not affect the rest of the data in the template.

Deletion:

When a line is deleted, all associated data such as table fields, Excel fields, filters, and their relationships (if any) will also be deleted. If there are dependent lines at a lower level (greater indentation), you will need to correct them by moving them up one level (left arrow) or delete them. Upon deleting a line, only the standard Business Central confirmation message 'Go ahead and delete' will appear. In this case, **Open Entity** does not provide any additional warning about the deletion of fields, relationships, etc., for the convenience of the user.

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 (Im...
27	Item	0	27		Insert-Mod...	<input type="checkbox"/>		214	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5401	Item Variant	2	27		Insert-Mod...	<input type="checkbox"/>		8	No	0	No	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 5777	Item Reference	4	5401		Insert-Mod...	<input type="checkbox"/>		10	No	0	No	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Item Unit of Measure	6	5777		Insert-Mod...	<input type="checkbox"/>		0	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Field Relations									
New Line Delete Line									
Source Field ↑	Name	Type	Target Field	Name	Type	Enable			
→ 2	Item No.	Code20	1	Item No.	Code20	<input checked="" type="checkbox"/>			

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 (Im...
27	Item	0	27		Insert-Mod...	<input type="checkbox"/>		214	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5401	Item Variant	2	27		Insert-Mod...	<input type="checkbox"/>		8	No	0	No	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 5777	Item Reference	4	5401		Insert-Mod...	<input type="checkbox"/>		0	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5404	Item Unit of Measure	6	5777		Insert-Mod...	<input type="checkbox"/>		9	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5715	Item Substitution	8	5404		Insert-Mod...	<input type="checkbox"/>		14	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Go ahead and delete?

Yes No

The immediately lower line that becomes "orphaned" will change its color to **red**.

EXPORTITEMS

✕ You have some line(s) after the line deleted. Check if any line or configuration can be affected.

Copy-Paste Export Data Excel Save File Vars & Formulas Archive Get All Fields & Enable Permissions Copy Template Import from File Import from Entity Delete Obsolete/Non-Existent Fields ...

Source Table ID: 27 Allow Requests:
 Source Name: Item Enable:
 Description: Template for export items Use-Make Equivalence:
 Operation: Insert-Modify Folder: WORLDBESTCONSULTANT
 Table Trigger: Template Use: 0

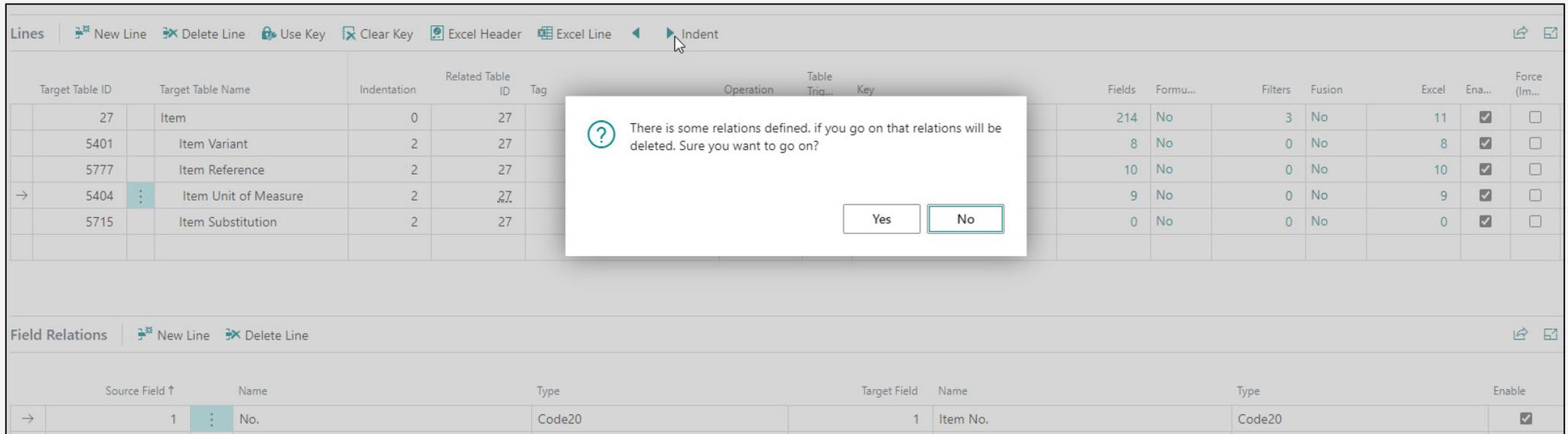
Lines | New Line Delete Line Use Key Clear Key Excel Header Excel Line ◀ ▶ Indent

Target Table ID	Target Table Name	Indentation	Related Table ID	Tag	Operation	Table Trig...	Key	Fields	Formu...	Filters	Fusion	Excel	Ena...	Force (Im...
27	Item	0	27		Insert-Mod...	<input type="checkbox"/>		214	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5401	Item Variant	2	27		Insert-Mod...	<input type="checkbox"/>		8	No	0	No	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 5404	Item Unit of Meas...	6	5777		Insert-Mo...	<input type="checkbox"/>		9	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5715	Item Substitution	8	5404		Insert-Mod...	<input type="checkbox"/>		14	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Orphan Line in Red

Level Changes (Indentation):

If you change the level of indentation and the program detects an existing relationship, it will notify you that the relationship will be deleted if you proceed with the change.



The screenshot shows a software interface with two main sections: 'Lines' and 'Field Relations'. The 'Lines' section contains a table with columns: Target Table ID, Target Table Name, Indentation, Related Table ID, Tag, Operation, Table Trig..., Key, Fields, Formu..., Filters, Fusion, Excel, Ena..., and Force (Im...). The 'Field Relations' section contains a table with columns: Source Field ↑, Name, Type, Target Field, Name, Type, and Enable.

A dialog box is overlaid on the 'Lines' table, displaying the following text: "There is some relations defined. if you go on that relations will be deleted. Sure you want to go on?". The dialog box has two buttons: "Yes" and "No".

Target Table ID	Target Table Name	Indentation	Related Table ID	Tag	Operation	Table Trig...	Key	Fields	Formu...	Filters	Fusion	Excel	Ena...	Force (Im...
27	Item	0	27					214	No	3	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5401	Item Variant	2	27					8	No	0	No	8	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5777	Item Reference	2	27					10	No	0	No	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 5404	Item Unit of Measure	2	27					9	No	0	No	9	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5715	Item Substitution	2	27					0	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Source Field ↑	Name	Type	Target Field	Name	Type	Enable
→ 1	No.	Code20	1	Item No.	Code20	<input checked="" type="checkbox"/>

Additionally, if you change the indentation of a line that has dependent lines, the next line will be highlighted in **red** as a warning of a structural inconsistency.

We recommend first creating the structure in the **Lines** section and, once you're confident that the structure meets your expectations, proceed with configuring the rest of the template (relationships, fields, filters, etc.).

DATA TRANSFORMATION

As we can deduce from the transformation diagram or '**transform into**' view seen in the previous document, the fields or columns responsible for modifying the data depend on a set of fields or columns in the field configuration page. Similar to filter configuration, the **Editable** and **Visible** fields allow a user executing the template to see or replace the value of a field. This substitution will either be shown on the Launcher page in the **Replace** section, or it will remain hidden if the replacement fields are configured as not visible, if the **Replace** section is hidden, or if the **Requester Page** is set to the **<blank>** type.

Depending on the perspective explained earlier, these modifiers will either be considered or ignored, with two exceptions:

1. The '**Fuse**' column or field, which only functions when selecting data (**Transform at -> Source or Both**).
2. The '**Serie No.**' column, which is associated with the '**Get Serie When**' column. The options '**Select & Saving**', '**Only Select**', and '**Only Saving**' replicate the behavior of the '**Transform at**' field for reading a serial number and assigning it to the designated field.

The rest of the modifiers potentially function in both directions—during export or selection, as well as during data import or saving to the database table.

The fields that modify the original values are:

Field ID	Field Name	Tag	Order	Serie No.	Get Serie When	Get From	Field Value	Mapping (Imports)	Ena... Map	Variable Id	Formula	Condit...	Ign... For...	Equal Field No.	Fuse	Cha... Sign (nu...	Vali...	Edit...	Visi...	Ena...	Lookup Page No.	Lookup Field No.
1	No.		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				
2	No. 2		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				
3	Description		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				
4	Search Description		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				
5	Description 2		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				
6	Assembly BOM		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	0				

- **Serie No.:** Allows the use of a serial number.
- **Get Serie When:** Specifies when a new serial number is obtained.
- **Get From:** Reads data directly from a table.
- **Field Value:** A fixed value.
- **Mapping:** Enables substitution of input data with output data, especially useful for data imports or internal modification processes.
- **Enable Mapping:** Enables or disables the **Mapping** field.

- **Variable Id.:** Allows assigning the field's value to a variable to be used later in another part of the template.
- **Formula:** Enables the creation of a mathematical, date, or text formula, whose result will be assigned to the field. It is also where a previously calculated variable can be placed to assign its value to the field.
- **Conditions:** Conditions that determine whether the formula in the previous field should be processed.
- **Ignore Formula:** Disables the formula calculation, even if it is configured.
- **Equal Field No.:** Copies the value from another field in the same table to the current field. This is commonly used when copying a value from a primary field, such as in the **Customer** table for the fields **'No.'** and **'Invoice Disc. Code'**. You can use the **Order** field in the template to ensure the field that needs to transfer its value is processed first.
- **Fuse:** Used to accumulate numeric values based on a defined grouping. It has two values:
 - **'Group':** Indicates the fields involved in the grouping.
 - **'Total':** Specifies the numeric field that will accumulate the values for this grouping. For example, you can group several sales orders into a single sales line (in the **sales line** table) by **'No.'** (product code) and **'Type'** (product type), and configure the field **'Outstanding Quantity'** as **'Total'**. **This option works only when generating or selecting data, not when importing or saving it.**
- **Change Sign:** Changes the sign of a numeric value to its opposite (from positive to negative or vice versa).

Serie No

TableData - 27 ✓ Saved  

Field Lines | Search Analyze + New  Edit List  Delete  Delete All  Get & Enable All  Enable All  Disable All  Enable Selected  Disable Selected  Check formulas | More options   

Field ID	Field Name	Order ↑	Series No.	Get From	Field Value	Mapping (Imports)	Ena... Map	Variable Id	Formula	Condi...	Ign... For...	Equal Field No.	Fuse	Cha... Sign (nu...)	Va
→ 1	No.	0	ITEM			0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
2	No. 2	0					<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
3	Description	0	Code ↑	Description			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
4	Search Description	0	I-SHPT	Inventory Shipment			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
5	Description 2	0	I-SHPT+	Posted Inventory Shipment			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
6	Assembly BOM	0	→ ITEM	Items			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
8	Base Unit of Measure	0	JJNL-GEN	Job Journal			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
9	Price Unit Conversion	0	JJNL-REC	Recurring Job Journal			<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
10	Type	0					<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
11	Inventory Posting Group	0					<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	
12	Shelf No.	0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	

Series No Selection Menu:

- Code ↑
- I-SHPT
- I-SHPT+
- ITEM
- JJNL-GEN
- JJNL-REC
- + New

[Show details](#) [Select from full list](#)

We will select a value in the **Serie No.** field when we want to replace a code from a table with a new serial number. This column allows us, for example, to export data with the **'transform at'** field set to **'target'** or **'both'**, so that the transferred entity is saved at the destination with its own numbering. At the source, it allows us to perform a copy-paste operation with a new key or serial number. When an action is executed using this column, the serial number will automatically increment in Business Central.

Get From Template

The **Get From** template is a special template used to read a **single field** from a table.

It can be configured with fixed data or defined variables, and the names of these variables must match those used in the template.

We will see how to use **Get From** in conjunction with a template later in this section.

In the image below, a simple **Get From** template is shown to read our 'VAT number'. If we put the code **GETMYVATREG** in the **Get From** column of a template field, it will read the value of our 'VAT REGISTRATION NO.' and assign it to the field.

Get From Header

GETMYVATREG

General

Code GETMYVATREG

Source Table ID 79

Source Name Company Information

Description Get my vat registration no.

Suitable for Get From

Get From Return Field

Field ID 19

Name VAT Registration No.

Enable

GetFrom Use 0

Lines | New Line | Delete Line

Field ID	Field Name	Operator	Field Value	Is a Var	Order ↑
1	Primary Key	=		<input type="checkbox"/>	0

Note: If we consistently use the same variable names across templates (variable names are case-sensitive), we can increase the versatility of the **Get From** feature. It is not necessary to create a separate **Get From** for each template; they can be reused across any base template.

Field Value: In this column, you enter a fixed value that will remain constant throughout the execution of an action. The data can be entered manually or retrieved from the field itself if it has a relationship with its master table (using **assist edit**) or if the **Lookup Page** and **Field** have been configured.

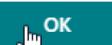
TableData - 27 ✓ Saved  

Field Lines | Search Analyze + New  Edit List  Delete  Delete All ...   

Field ID	Field Name	Serie No.	Get From	Field Value	Mappir (Import)
92	Picture				
93	Transferred (Qty.)				
94	Transferred (LCY)				
→ 95	Country/Region of Origin Code			<input type="text"/>	
96	Automatic Ext. Texts				

Countries/Regions |  + New  Edit List ...  

Code ↑	Name	ISO Code	ISO Numeric Code	Address Format	Contact Address Format	State Name	Tax !
ST	São Tomé and Príncipe	ST	678	City+ZIP C...	After Comp...		
SV	El Salvador	SV	222	City+ZIP C...	After Comp...		
SZ	Swaziland	SZ	748	City+ZIP C...	After Comp...		
TH	Thailand	TH	764	ZIP Code+...	After Comp...		
TN	Tunisia	TN	788	ZIP Code+...	After Comp...		
TR	Türkiye	TR	792	ZIP Code+...	First		?
TT	Trinidad and Tobago	TT	780	City+ZIP C...	After Comp...		
TW	Taiwan	TW	158	City+ZIP C...	After Comp...		
TZ	Tanzania	TZ	834	ZIP Code+...	After Comp...		
UA	Ukraine	UA	804	City+ZIP C...	After Comp...		
UG	Uganda	UG	800	City+ZIP C...	After Comp...		
→ US	USA	US	840	City+State...	After Comp...	State	
UY	Uruguay	UY	858	City+ZIP C...	After Comp...		
VG	British Virgin Islands	VG	092	City+ZIP C...	After Comp...		

Mapping: You can access the mapping configuration by clicking on the value in the **Mapping** field. This will open a page displaying **Entry Value** (input value) and **Final Value** (output value) for that field. When the data for the respective field is processed, the system will check the field's values against the mapping. If it finds a match for the **Entry Value** and a corresponding **Final Value** is configured, it will replace the original value with the final one.

TableData - 27

Field Lines | Search | Analyze | + New | Edit List | Delete | Delete All | Get & Enable All | Enable All | Disable All | Enable Selected | Disable Selected | Check formulas | More options

Field ID	Field Name	Tag	Order ↑	Serie No.	Get From	Field Value	Mapping (Imports)	Ena... Map	Variable Id	Formula	Condi...	Ign... For...	Equa
1	No.		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
2	No. 2		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
3	Description		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
4	Search Description		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
5	Description 2		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
6	Assembly BOM		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
→ 8	Base Unit of Measure		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	
9	Price Unit Conversion		0				0	<input type="checkbox"/>			No	<input type="checkbox"/>	

EXPORTITEMS | Saved | [Icons]

NOW Mapping Fields Lines | Search | Analyze | + New | Edit List | Delete | [Icons]

Field ID ↑	Entry Value	Final Value
8	UD	UNIT
8	BOLSA	BAG
8	PIEZAS	PCS
→ 8	CAJA	<input type="text" value=""/>

For the '**Mapping**' column to be operational, the '**Enable Mapping**' column must be activated (checked). This column is used to enable or disable the input-output value mapping without having to delete its configuration.

VARIABLES AND FORMULAS

The next three columns—'**Variable Id**', '**Formula**', and '**Conditions**'—can work in combination.

- '**Variable Id**': When a name is placed in this column, it assigns the value of the configured field to the variable when the information is read. This allows access to the variable's value at any "location" or level within the template, until a new value is assigned to the variable by another record.
- '**Formula**': This column has a dual function: it either assigns the value of a variable to the field or performs a mathematical, date, or text calculation. If the formula involves a variable, it will use the variable's value for the calculation.

When both columns are defined, the assignment sequence is as follows:

1. The field's value is assigned to the variable.
2. The formula is calculated, with the variable name being replaced by its value.
3. The result is assigned to the field, and to the variable if the '**Variable Id**' column is filled in.

In the image below, a typical use of this combination is shown: the sequential increment of a line number to be inserted into the detail of any document in Business Central or a General Journal line.

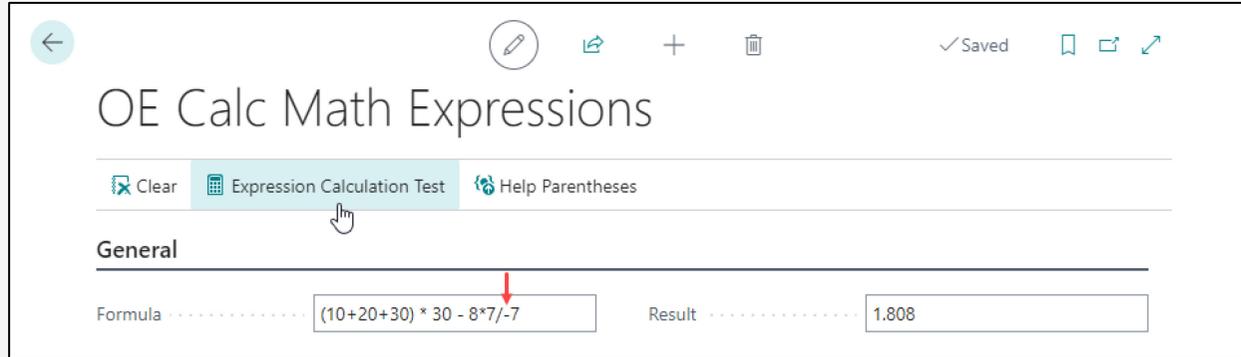
TableData - 37

OE Field Lines | [Icons] | + New | Edit List | Delete | Delete All | Get & Enabled All | Enabled All | Disable All | Check Duplicates | Enabled Selected | Disable Selected | Check formulas | ... | [Icons]

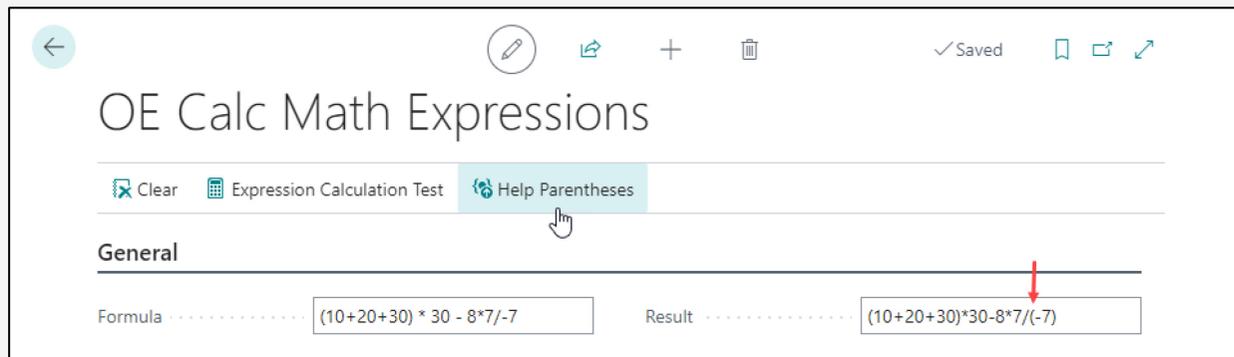
Field ID	Field Name	Tag	Order	Series No.	Get Series When	Get From	Field Value	Mapping (Imports)	Enabled	Variable Id	Formula	Conditions	Ignore Formula	Equal Field No.	Fuse	Character Sign	Valid	Editable	Visible	Enabled	Lo
1	Document Type		0				Order	0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
2	Sell-to Customer No.		0					0	<input type="checkbox"/>		custNo	No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	Document No.		0					0	<input type="checkbox"/>		orderNo	No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
→ 4	Line No.		0					0	<input type="checkbox"/>	line	line + 10000	No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
5	Type		0				Item	0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
6	No.		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
15	Quantity	Outstandi...	0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

The '**Ignore Formula**' field works similarly to the '**Enable Mapping**' field. If '**Ignore Formula**' is activated, no calculations will be performed on the line, making it unnecessary to delete the formula if one exists.

You can verify a formula using the '**Check Formulas**' action from the top toolbar. This will open a new page where you can perform a numerical calculation to test the formula.



In the previous example, we wrote a formula with two contiguous arithmetic operators. Normally, Business Central would throw an error for this, but the **Open Entity** application will automatically add parentheses to allow the calculation. If you click on the '**Help Parentheses**' action, you will see the syntax of the applied formula, showing how the parentheses were added.



Arithmetic expressions only include the basic operators: addition, subtraction, multiplication, division, and exponentiation, as well as parentheses to group and prioritize operations.

In the **Formula** column of the **Lines** section, you can also enter date calculations such as:

- **Today**
- **Workdate**
- **'vDate;+1M -1D'** (which increments a date by one month and subtracts one day)

You can also enter text formulas, such as **Invoice InvNo**, where **InvNo** is a variable containing a value like an invoice number. For example, the result could be **Invoice INV24-0001**.

Note: The calculation of mathematical expressions is based on Business Central's functionality related to the **account schedules** (balances) feature. This comes with some limitations, such as:

- The length of the expression cannot exceed **250 characters** (excluding white spaces, which are removed beforehand).
- The presence of consecutive operators, as mentioned earlier.

CONDITIONS

Conditions are applied to formulas to determine whether their calculations will be executed or not.

First, you must create a **collection of individual conditions** based on a particular table (the creation of conditions will be covered later).

These condition sets are reusable across any base template and can be combined with others.

To configure a conditional formula, access the value in the **'Conditions'** column in the field configuration, which will open the condition composition page for the field's formula.

TableData - 27

Field Lines | Search | Analyze | + New | Edit List | Delete | Delete All | ...

Field ID	Field Name	Ena... Map	Variable Id	Formula	Condi...	Ign... For...
17	Commission Group	<input type="checkbox"/>			No	<input type="checkbox"/>
→ 18	Unit Price	<input type="checkbox"/>	UPrice	UPrice + (UPrice * 10 / 100)	No	<input checked="" type="checkbox"/>
19	Price/Profit Calculation	<input type="checkbox"/>			No	<input type="checkbox"/>

EXPORTITEMS

List of Conditions for the Formula | Search | Analyze | + New | Edit List | Delete

	Condition	Order ↑	Logical Operator
→		0	

ITEMSCONDITION2:

OE Conditions Header

ITEMSCONDITION2

General

Code ITEMSCONDITION2 Suitable for Formula

Source Table ID 27 Enabled

Source Name Item Use Condition 0

Description

Lines | [New Line](#) | [Delete Line](#) | [Refresh](#) | [Print](#)

	Field ID	Field Name	Operator	Field Value	Criteria String	Order ↑	Logical Operator	Enabl...
	78	Sales (LCY)			>15000	0	Or	<input checked="" type="checkbox"/>
→	91	Gen. Prod. Posting Group	=	RETAIL		0		<input checked="" type="checkbox"/>

In this example, we combine two groups or sets of conditions using the **AND** operator, meaning both must be met. Specifically, the product description must contain the word **Chair** and the unit price must be less than 1000. Additionally, the product sales must exceed 15,000 **OR** its **Gen. Prod. Posting Group** must be **RETAIL**. If both groups of conditions are satisfied, the calculation defined in the **Formula** column will be executed.

Important:

In the field configuration, the fields involved in the conditions must come **before** the field where the calculation is applied.

In our current example, the field **91 'Gen. Prod. Posting Group'** is positioned far ahead of **field 18 'Unit Price'**. When checking the conditions, it would compare a value that hasn't been read yet with **RETAIL**, causing the conditions to fail, and the calculation would not be performed.

The solution is simple: you need to adjust the order in the field configuration (using the **Order** column) so that **'Gen. Prod. Posting Group'** is read **before 'Unit Price'**, where the calculation is being performed.

99008500	Common Item No.	0
91	Gen. Prod. Posting Group	10
18	Unit Price	20

Equal Field No.: This will replace the value of the field where it is defined with the current value of the field number specified. It's common in some setups to see two key code values defined in different fields. For example, with Customers, we might have **No. = 10000** and the **Invoice Disc. Code** field containing the same value. If we perform an export where the **No.** field is going to change in the destination, we'll want to preserve this equivalence with the new value generated in the destination.

In this case, in the line for the **Invoice Disc. Code** field, we would put the value **1** (field **No.**) in the '**Equal Field No.**' column to replace it with the updated value at the destination.

It's important that this modifier is placed **after** the value of the field you want to capture (in this case, **No.**). If not, you can adjust the order of the lines in the field configuration using the **Order** column, as explained earlier.

Fuse: This allows us to group and totalize numeric values. In the field configuration, we define the fields we want to group using the '**Group**' dropdown option and a numeric field (quantity, amounts, etc.) with the '**Total**' option. For example, in a template that manages sales order lines, we can group by the **No.** (product code) field and total by **Quantity** or **Amount**. This will consolidate many product lines into fewer lines (one per product).

TableData - 37 ✓ Saved  

OE Field Lines    + New           ⋮   

Field ID ▼	Field Name	Tag	Order ↑	Serie No.	Get Serie When	Get From	Field Value	Mapping (Imports)	Ena... Map	Variable Id	Formula	Condi...	Ign... For...	Equal Field No.	Fuse	Cha... Sign (nu...	Vali...	Edit...	Visi...	Ena...	Lookup Page No.	Lookup Field Ni
3	Document No.		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
6	No.		0			GETITEMREF		0	<input type="checkbox"/>	itemVendor		No	<input type="checkbox"/>	0	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	
→ 16	⋮ Outstanding Quantity		0					0	<input type="checkbox"/>			No	<input type="checkbox"/>	0	Total ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	

Total
 Group
 Total

Change Sign: This will reverse the sign of the numeric value in the field, turning a positive value into a negative one, or vice versa.

TEMPLATE ACTIONS

The actions located at the top of the base template page are intended for advanced users, such as consultants or developers. These actions are used to test templates or perform specific tasks or fixes. It is recommended to first test them in online sandboxes provided by Microsoft for free, or any other sandbox environment (Docker, Azure) before moving them to production and executing them.

Regular users can execute these actions depending on the configuration and permissions granted by the application manager. These actions can be accessed through **Custom Templates**, from the user's **Dashboard** or **Control Panel**, or from the main data lists where they have permission to use the **Copy-Clipboard** action.

OE Template Base

EXPORTITEMS

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: EXPORTITEMS

Source Table ID: 27

Source Name: Item

Description: Template for Export Items

Operation: Insert-Modify

Table Trigger:

Permissions: [Greyed out]

Allow Requests:

Enabled:

Use-Create Equivalence:

Folder: [Dropdown]

Template Use: 0

Dropdown menu options: Delete Data (Entity), Automate, Fewer options

COPY-PASTE

The **Copy-Paste** action allows you to copy multiple records (from a selector or launcher) with a different key. The new key can be created either manually by entering a code or by using the 'Serie No.' column, which will automatically assign new values.

TableData - 27

Field Lines Search Analyze + New Edit List Delete Delete All Get & Enable All Enable All Disable All Enable Selected Disable Selected Check formulas More options

Field ID	Field Name	Order	Serie No.
1	No.	0	OEITEMS
2	No. 2	0	

Select - No. Series

Code	Starting No.	Ending No.	Last Date Used	Last No. Used	Def... Nos.	Ma... Nos.	Date Order	Allow Gaps in Nos.
OEITEMS	OEIT-0001	-	-	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OPP	OP000001	OP999999	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The initial page will depend on what is defined in the **Requester** field of the '**Requester Page**' section. You will see the sections relevant to your setup. In the current case, you will see the **Filters** and **Replace** sections of the launcher.

Requester Page

Requester Launcher

Hide Parameters

Hide Replace Hide tables section in launcher

Hide Filters

The fields that have been configured as **editable** in the field and filter configuration will allow you to modify their values (highlighted by red arrows) on the Launcher page.

OE Launcher

Edit List Launch

OE Filters Section

Field Name	Operator	Field Value	Filter String	Ena.
Item				
No.			1896-S..1996-S	
→ Date Filter	:		010124..310324	
Location Filter				

OE Replace Section

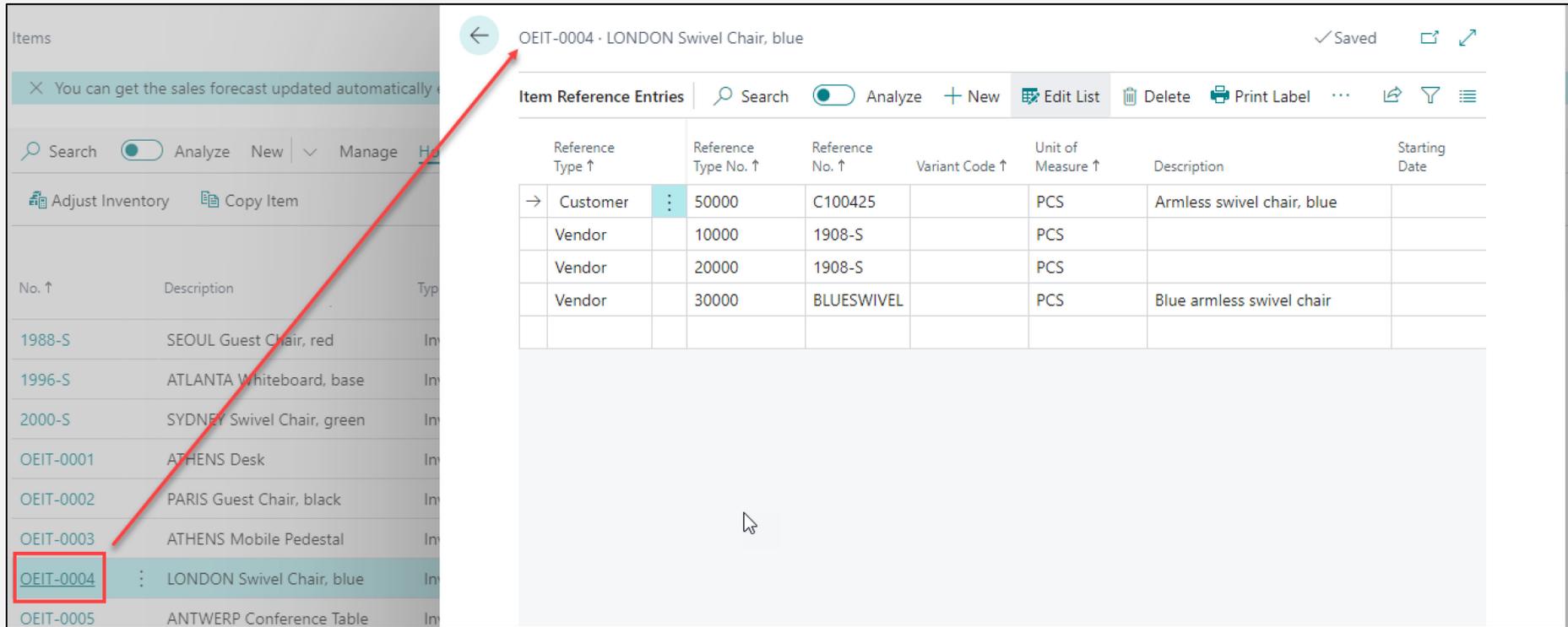
Field Name	Value	Serie No.
Item		
→ No.	:	OEIT

Code ↑ Description

- OEIT Open Entity Demo Items
- OPO Oportunidad
- P-ABRT Pedido abierto compra
- PDIRTRANS Transferencia directa registrada
- P-PL Lista de precios de compra

+ New Show details Select from full list

When you execute the launcher with the **Launch** action, the **copy-paste** process will run, copying all the information defined in the template using the new codes.



The screenshot displays a software interface with two main panels. The left panel shows a list of items, with 'OEIT-0004 · LONDON Swivel Chair, blue' highlighted and enclosed in a red box. A red arrow points from this item to the right panel. The right panel shows the detailed view for 'OEIT-0004 · LONDON Swivel Chair, blue', which is marked as 'Saved'. Below the header, there is a table titled 'Item Reference Entries'.

Reference Type ↑	Reference Type No. ↑	Reference No. ↑	Variant Code ↑	Unit of Measure ↑	Description	Starting Date
→ Customer	50000	C100425		PCS	Armless swivel chair, blue	
Vendor	10000	1908-S		PCS		
Vendor	20000	1908-S		PCS		
Vendor	30000	BLUESWIVEL		PCS	Blue armless swivel chair	

Note: Regardless of what is defined in the template, the **Copy-Paste** option always performs the **Insert** action, and its perspective (**Transform at**) will be of the **Source** type.

EXPORT DATA

When executing the **Export** action, we will transfer our entity to another company, database, or tenant. Therefore, the first thing it will ask is for the **destination** (tenant and company). If the perspective is set to **Target** or **Both**, it will also ask which **destination template** should receive and process the data. If **'Transform at'** is set to **Source**, no template will be required.

The data displayed during this process comes from the configuration located in **Setup -> Tenants-Company**.

Once the destination and template are confirmed, the **Launcher** will appear, allowing us to edit our selection before exporting.

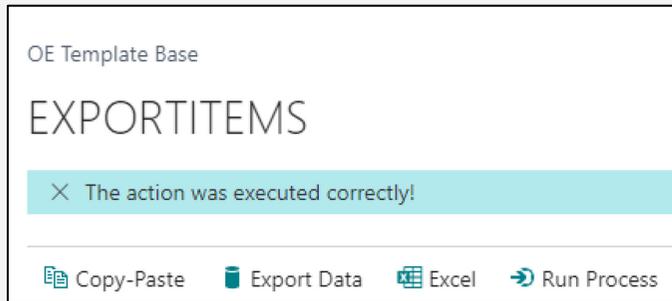
The image shows a multi-step process for data export configuration. It includes three overlapping windows:

- Tenants Selection:** A list view with columns 'Code' and 'Description'. The entry 'MY TENANT' is selected.
- Companies Selection:** A list view with columns 'Company Name' and 'Addition'. The entry 'My Company' is selected.
- Confirmation Dialog:** A modal window with a question mark icon and the text: "Confirm the action for tenant MY TENANT, company My Company and template selection?". It has 'Yes' and 'No' buttons.
- OE Launcher:** A configuration window with the following sections:
 - Buttons:** 'Edit List' and 'Launch' (highlighted).
 - Template:** Fields for 'Code' (EXPORTITEMS) and 'Table Name' (Item). 'Table ID' is 27.
 - OE Filters Section:** A table with columns: Field Name, Operator, Field Value, Filter String, and Enabled.

Field Name	Operator	Field Value	Filter String	Ena...
Item				<input checked="" type="checkbox"/>
→ No.	:		OEIT-0001..OEIT-0003	<input checked="" type="checkbox"/>
Date Filter				<input checked="" type="checkbox"/>
Location Filter				<input checked="" type="checkbox"/>

At the bottom of the OE Launcher is the 'OE Replace Section >' and a 'Close' button.

Once the export process is executed, the **Launcher** page will close, and a notification will appear at the top of the page indicating the result of the action. If an error has occurred, you will be prompted to check the application's **input-output folders** for further details.



We then review the data in the destination company and can confirm that all the record data has been successfully exported.

Items

← OEIT-0001 · Escritorio ATENAS ✓ Saved

Item Units of Measure + New Edit List Delete

Code ↑	Qty. per Unit of Measure	Height	Width	Length	Cubage	Weight
→ LITROS	1	0	0	0	0	500
LL	1,8	0	0	0	0	0
UA	0,45	0	0	0	0	0
UDS	1	0	0	0	0	34,6

Items list (left sidebar):

- 1988-S Silla inv. SEUL, roja
- 1996-S Pizarra ATLANTA, base
- 2000-S Silla giratoria SIDNEY, verde
- F-100 Bomba remota
- F-101 Vasos de café de papel
- GRH-1000 Precision Grind Home
- GRH-1001 Smart Grind Home
- MYITEMNEW Escritorio ATENAS
- OEIT-0001** : Escritorio ATENAS
- OEIT-0002 Silla inv. PARÍS, negra
- OEIT-0003 Pedestal móvil ATENAS

When we execute the **Copy-Paste** and **Export** actions, input and output lines are generated in the application's "mailboxes" or folders.

In the **outbox** of our company, we can view the actions directed "externally" that we have carried out. The page filters the lines by **Exports, Other Operations, or Responses (View Exports, Others, and Responses)**. In the current case, we can see that the '**Target Template**' column is empty because we sent the information "as is" with '**Transform at**' set to **Source**.

Remember that with '**Transform at Source**', there is no destination template to receive the data—it simply imports the data exactly as it is received.

OE Entity Exports List

Source Template	Target Template	Date	Time	Action	Operation	Run Type	Sending User	Sender Company	Target Company	Transform at	Parent Code	Tenant Code	Us	Cr	Eq
EXPORTITEMS		05/08/2024	12:52:13	Export	Insert-Modi...	Normal	TOLO.SASTRE	CRONUS ES	CRONUS ES	Source	NOMADSE...	SANDBOX...			

Log

Record ID	Action	Success	Error Code	Error Description
Item: OEIT-0001	Insert	✓		
Item Unit of Measure: OEIT-0001,LITROS	Insert	✓		
Item Unit of Measure: OEIT-0001,LL	Insert	✓		
Item Unit of Measure: OEIT-0001,UA	Insert	✓		
Item Unit of Measure: OEIT-0001,UDS	Insert	✓		
Item: OEIT-0002	Insert	✓		
Item Reference: OEIT-0002,"",UDS,Vendor,10000,1900-S...	Insert	✓		
Item Unit of Measure: OEIT-0002,CONJUNTO	Insert	✓		

At the bottom, in the **Log** section, we can see the results of the actions carried out at the destination.

The destination company will also have an entry for the completed export, but it will be located in the **inbound folder** (Inbound Folder).

OE Entity Imports List

+ New Manage Save File Delete All Clear All (Entity field) Card Grid Manual Import Send Response Archive Refresh Take to Garage. View Imports ...

Source Template	Target Template	Date	Time	Action	Operation	Run Type	Sending User	Sender Company	Target Company	Perspective	Tenant Code Source	Tenant Code Target	Us Cr Eq
EXPORTITEMS	:	05/08/2024	10:52:10	Export	Insert-Modi...	Normal	TOLO.SASTRE	CRONUS ES	CRONUS ES	Source	NOMADSERVICES	SANDBOXDEV	

Log

Record ID	Action	Success	Error Code	Error Description
Item: OEIT-0001	Insert	✓		
Item Unit of Measure: OEIT-0001,LITROS	Insert	✓		
Item Unit of Measure: OEIT-0001,LL	Insert	✓		
Item Unit of Measure: OEIT-0001,UA	Insert	✓		
Item Unit of Measure: OEIT-0001,UDS	Insert	✓		
Item: OEIT-0002	Insert	✓		
Item Reference: OEIT-0002,"",UDS,Vendor,10000,1900-S-NEW	Insert	✓		
Item Unit of Measure: OEIT-0002,CONJUNTO	Insert	✓		

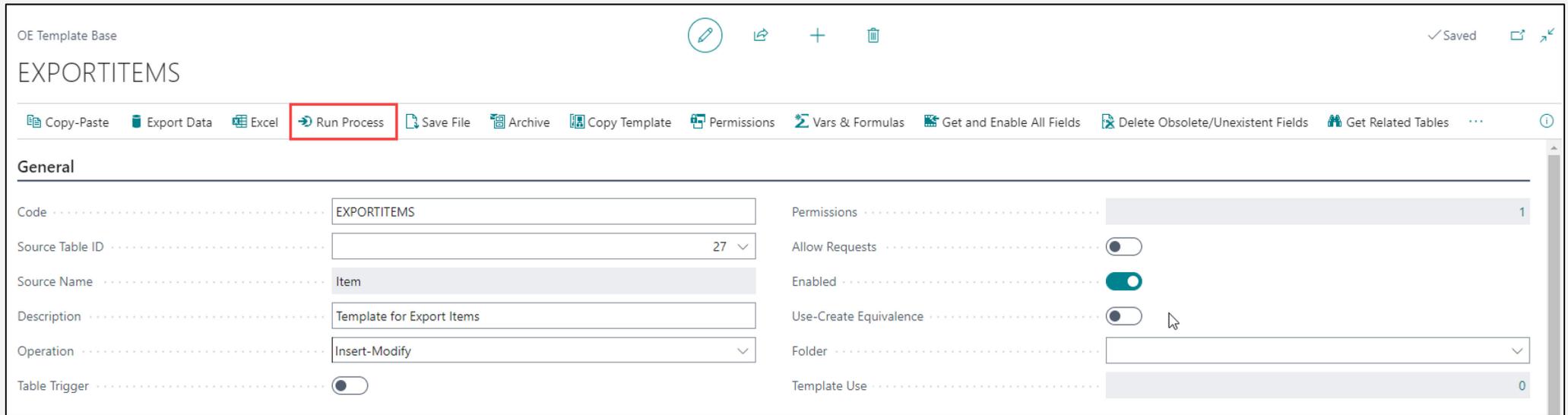
EXCEL

This action has already been discussed earlier in the **Excel Field Configuration** section. It generates and downloads an Excel sheet to the **'Download'** folder on your local computer, containing the data processed by the template. The formatting of the sheet is determined by the **Excel Header** and **Excel Line** options in the **Lines** section of the template, as well as the **sum up**, **total**, and **number format** options set in the **Excel Field Configuration** page.

RUN PROCESS

This action allows us to execute data insertion or correction processes (e.g., user input errors) and business processes in the current company. For this action, the selected page should be of the **Launcher** type, and the **Replace** and **Filters** sections should always be visible to allow the replacement of relevant fields and proper selection of the records to be modified. It is the responsibility of the template creator to ensure that the **Run Process** action is executed correctly according to the desired functionality.

The modifications will be subject to Business Central's standard permissions, and **primary key fields cannot be changed**. The **Run Process** action does not allow performing the **Rename** action for a template. Just as **Open Entity** does not apply any key changes to the data, it also does not allow deletion through template operations (via the **Operation** field). Data can only be deleted through the **Delete Entity** action available in the Base Templates (via the **Delete Entity** action).



OE Template Base

EXPORTITEMS

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

✓ Saved

General

Code	EXPORTITEMS	Permissions	1
Source Table ID	27	Allow Requests	<input type="checkbox"/>
Source Name	Item	Enabled	<input checked="" type="checkbox"/>
Description	Template for Export Items	Use-Create Equivalence	<input type="checkbox"/>
Operation	Insert-Modify	Folder	
Table Trigger	<input type="checkbox"/>	Template Use	0

Field Value Replacement example:

OE Launcher ↗ ✕

Edit List Launch ↗

OE Filters Section ↗

Field Name	Operator	Field Value	Filter String	Ena.
Item				<input type="checkbox"/>
→ <u>No.</u>	:		1896-S..1996-S	<input checked="" type="checkbox"/>

↑

OE Replace Section ↗

Field Name	Value	Serie No.
Item		
→ <u>Gen. Prod. Posting Group</u>	:	MERCADERÍA
VAT Prod. Posting Group		

↑

Close

RUN PROCESS II

Execution of Business Processes: The functionality of **Run Process** will allow us to execute various processes related to the generation of new data, for example, the creation of new discount lines based on existing lines or the merging of lines from any type of document, whether registered or not, journals, etc. In the first case, we would only need the main template; for the second case, we can use an additional "destination" template configured in the **Target** section of **Custom Templates**, which will process the data generated or selected by the initial one.

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

Source Table ID:

Source Name:

Description:

Operation:

Table Trigger:

Allow Requests:

Enabled:

Use-Create Equivalence:

Folder:

Template Use:

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...	<input type="checkbox"/>		163	No	1	No	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 7004	⋮ Sales Line Discount	2	18		Insert-Mod...	<input type="checkbox"/>		11	Yes	1	No	11	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Field Relations >

Parameters
New Line
Delete Line

Name ↑	Name for Users	Value
→ myIncrement	⋮ Increment Discount in	1.9

OE Field Lines - TableData · 7004

Field ID	Field Name	Ma... (Im...	Ena... Map	Variable Id	Formula ▼	Condi...	Ignore Formula
4	Starting Date	0	<input type="checkbox"/>		today	No	<input type="checkbox"/>
15	Ending Date	0	<input type="checkbox"/>		today;+3M	No	<input type="checkbox"/>
5	⋮ Line Discount %	0	<input type="checkbox"/>	Idisc	Idisc + myIncrement	Yes	<input type="checkbox"/>

In this example, when the 'Run Process' action is executed, the discount lines of the selected customers will first be read (selection phase) by the initial date. After this selection is made, the process will continue on the same template, creating (Insert-Modify) new lines according to the formulas defined in the fields (**Starting-Ending Date** and **Line Discount %**). As described, it is possible to transfer the selection from an initial template to a different template to perform another type of operation that could not be executed by the original template alone.

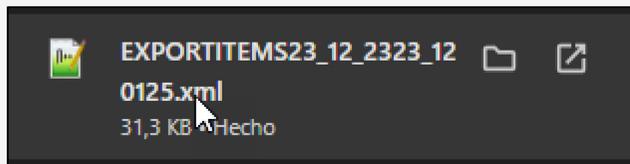
SAVE FILE

This action generates an XML file containing the processed information and downloads it to the personal computer. It is very useful for reviewing the data before copying or exporting it. This action always generates the data file with table and field names or their numbering, depending on the value of the 'Transform at' field at that time.

The screenshot shows the 'OE Launcher' application window. At the top, there are 'Edit List' and 'Launch' buttons. Below this is the 'Template' section with input fields for 'Code' (EXPORTITEMS), 'Table Name' (Item), and 'Table ID' (27). The 'OE Filters Section' contains a table with filter criteria.

Field Name	Operator	Field Value	Filter String	Ena...
Item				<input checked="" type="checkbox"/>
→ No.	:		OEIT-0001..OEIT-0003	<input checked="" type="checkbox"/>

The file name will be the template name plus the date and time when the process is executed.



If the only purpose is to review the information, remember to delete the 'Serie No.' column if it has been configured with a value, so that new numbering is not generated unless desired.

Depending on the value of the 'Transform at' field in our template, the file will be generated with **numeric tags** for tables and fields (**Source**) or with their **names** (without spaces or special characters) for **Target-Both**.

Target – Both

```
1 <?xml version="1.0" encoding="UTF-8" standalone="no"?>
2 <Root>
3 <table:Item xmlns:table="Item">
4 <No.>OEIT-0001</No.>
5 <No.2></No.2>
6 <Description>Escritorio ATENAS</Description>
7 <SearchDescription>ESCRITORIO ATENAS</SearchDescription>
8 <Description2></Description2>
9 <AssemblyBOM>No</AssemblyBOM>
10 <BaseUnitofMeasure>UDS</BaseUnitofMeasure>
11 <PriceUnitConversion>0</PriceUnitConversion>
12 <Type>Inventory</Type>
13 <InventoryPostingGroup>MERCADERÍA</InventoryPostingGroup>
14 <ShelfNo.></ShelfNo.>
15 <ItemDisc.Group></ItemDisc.Group>
16 <AllowInvoiceDisc.>Yes</AllowInvoiceDisc.>
17 <StatisticsGroup>0</StatisticsGroup>
18 <CommissionGroup>0</CommissionGroup>
19 <UnitPrice>1005,8</UnitPrice>
20 <PriceProfitCalculation>Profit=Price-Cost</PriceProfitCalculation>
21 <Profit>21,99244</Profit>
22 <CostingMethod>FIFO</CostingMethod>
23 <UnitCost>784,6</UnitCost>
24 <StandardCost>784,6</StandardCost>
25 <LastDirectCost>784,6</LastDirectCost>
26 <IndirectCost>0</IndirectCost>
27 <CostisAdjusted>Yes</CostisAdjusted>
28 <AllowOnlineAdjustment>Yes</AllowOnlineAdjustment>
```

Source

```
1 <?xml version="1.0" encoding="UTF-8" standalone="no"?>
2 <Root>
3 <table:T27 xmlns:table="Item">
4 <F1>OEIT-0001</F1>
5 <F2></F2>
6 <F3>Escritorio ATENAS</F3>
7 <F4>ESCRITORIO ATENAS</F4>
8 <F5></F5>
9 <F6>>false</F6>
10 <F8>UDS</F8>
11 <F9>0</F9>
12 <F10>Inventory</F10>
13 <F11>MERCADERÍA</F11>
14 <F12></F12>
15 <F14></F14>
16 <F15>>true</F15>
17 <F16>0</F16>
18 <F17>0</F17>
19 <F18>1005,8</F18>
20 <F19>Profit=Price-Cost</F19>
21 <F20>21,99244</F20>
22 <F21>FIFO</F21>
23 <F22>784,6</F22>
24 <F24>784,6</F24>
25 <F25>784,6</F25>
26 <F28>0</F28>
27 <F29>>true</F29>
28 <F30>>true</F30>
```

ARCHIVE

The **Archive** action allows us to save or archive the data that will be processed with our template, which can later be reviewed from the **Archive** section or stack in the Control Panel. This will open a list of all archived items.

When executing this action, the page configured in the **Requester Page** (either Selector or Launcher) will appear. However, before finalizing, it will ask for a **name** and **observation** (optional data). Depending on the value of the 'Transform at' field in the template, the data tags will be saved in either **numeric format** (source) or **alphanumeric format** (target and both).

The screenshot shows the OE Template Base interface for 'EXPORTITEMS'. The 'Record Lookup' dialog is open, displaying a table of items with columns for No., Description, Inventory, and Unit Price. The 'OE Archive Dialog' is also open, showing fields for Name and Notes.

No. ↑	Description ↑	Inventory ↑	Unit Price ↑
<input type="radio"/> 1988-S	Silla inv. SEUL, roja	0	193,7
<input type="radio"/> 1996-S	Pizarra ATLANTA, base	10	1.404,3
<input type="radio"/> 2000-S	Silla giratoria SIDNEY, verde	38	191
<input type="radio"/> F-100	Bomba remota	0	100
<input type="radio"/> F-101	Vasos de café de papel	0	2.400
<input type="radio"/> GRH-1000	Precision Grind Home	35	199
<input type="radio"/> GRH-1001	Smart Grind Home	35	299
<input type="radio"/> MYITEMNEW	Escritorio ATENAS	0	1.005,8
<input checked="" type="radio"/> OEIT-0001	Escritorio ATENAS	0	1.005,8
<input checked="" type="radio"/> OEIT-0002	Silla inv. PARÍS, negra	0	193,7
<input checked="" type="radio"/> OEIT-0003	Pedestal móvil ATENAS	0	435,8
<input type="radio"/> S00001	Escritorio ATENAS	0	1.005,8
<input type="radio"/> S00002	Pedestal móvil ATENAS	0	435,8
<input type="radio"/> S00003	Lámpara ÁMSTERDAM	0	55,2
<input type="radio"/> S-100	S-100 Semi-Automatic	0	2.400

OE Archive Dialog

Name: OEIT items

Notes: Demo Archive

Archive List

OE List Archives

[Edit List](#)
[Delete](#)
[Card](#)
[Grid](#)
[Data Recovery](#)
[Save File](#)
[Load File](#)
[Load Backup File](#)
[Take to Garage](#)
[Backup Open Entity Tables](#)
[Restore OE Tables](#)
[More options](#)

General

Entry No. ↑	Date	Time	Type	Transform at	Name	Notes	Use-Create Equiva...	Source Template	User	Track
1	03/06/2024	3:28:56	User	Target	test custnewdiscounts	test custnewdiscounts	<input type="checkbox"/>	CUSTNEWDISCO...	TOLO.SASTRE	{87b5e6f0-c99f-4368-ab2a-0edc7001f...
2	06/06/2024	18:58:54	User	Target	InventorySandboxDev 06-06-24	Inventory with empty Location	<input type="checkbox"/>		TOLO.SASTRE	{092cde69-96c3-4692-9001-0d7a9393...
3	11/07/2024	9:55:40	SysApp	Source	Backup Data OE	from sysbackuprestore template: Date ...	<input type="checkbox"/>	SYSAPPBACKUPR...	TOLO.SASTRE	{bb7938e0-fb79-4b81-bff2-680524fe4...
→ 4	06/08/2024	11:35:09	User	Target	OEIT items	Demo Archive	<input type="checkbox"/>	EXPORTITEMS	TOLO.SASTRE	{2ef9f180-f43d-4237-a2f4-37a6c50e7d...

COPY TEMPLATE

The **Copy Template** action copies the current template under a new name, and it is the only option for changing the template's code, as mentioned earlier.

When executing this action, a launcher page based on a system template (**SysAppExportTemplate**) will appear, along with the **Filters** and **Replace** sections where you can assign a new name to the selected or filtered template.

PERMISSIONS

This action is identical to clicking on the '**Permissions**' field in the template header. It will open a page where you can assign users or user groups.

Template permissions are **optimistic**: if no users or groups are defined, all users have permission to execute the template. However, if just one user or group is defined, access is restricted to the rest who are not configured.

OE Launcher

[Edit List](#)
[Launch](#)

Table ID 72139575

OE Filters Section

Field Name	Operator	Field Value	Filter String	Ena.
→ NOW Template Header				
→ Code	=	EXPORTITEMS		

OE Replace Section

Field Name	Value	Serie No.
→ NOW Template Header		
→ Code	EXPORTITEMS4JOHN	...

Close

VARS AND FORMULAS

This feature allows us to view and edit in a single page the variables and formulas created in the various fields of the template lines. From here, we can also navigate to their conditions and edit them (add or delete).

Variables & Formulas										
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"/>			

GET AND ENABLE ALL FIELDS

This action is identical to its counterpart '**Get and Enable All**' in the field configuration, except that it applies to **all fields across all lines** of the template. Before executing the action, it will ask for confirmation.

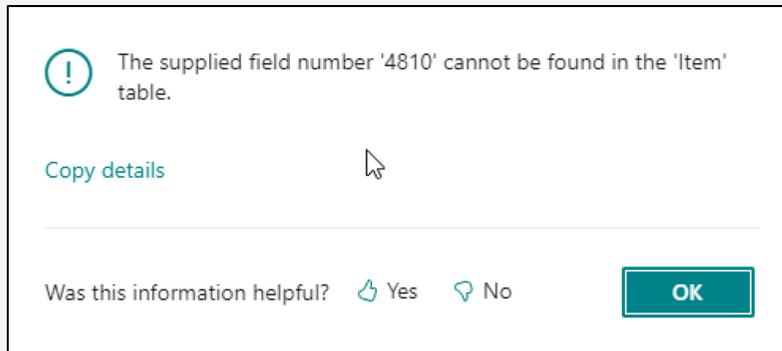
Confirm the Insertion of All Fields and Mark them as Enabled for All Lines of the Template?

DELETE OBSOLETE/UNEXISTENT FIELDS

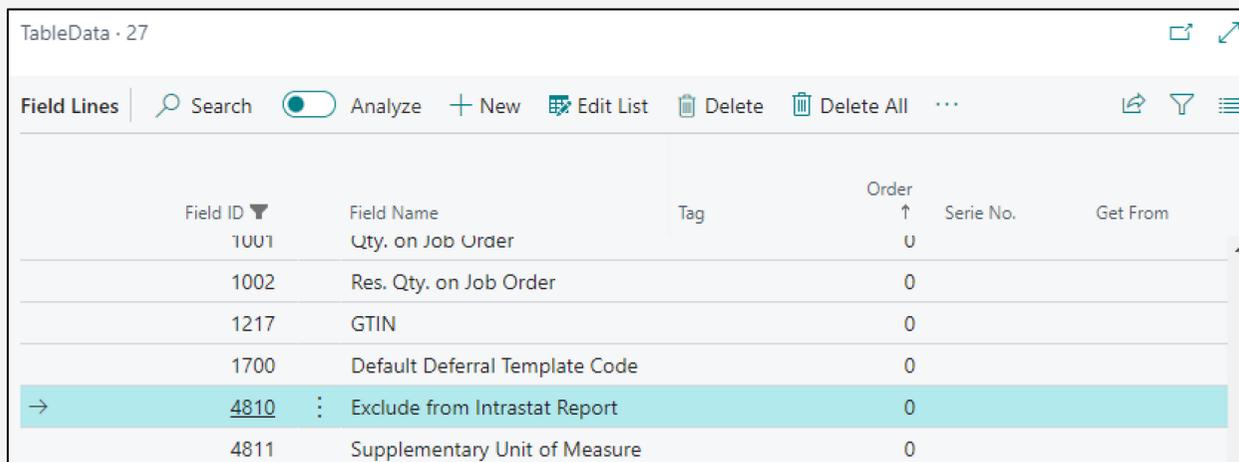
This option allows us to delete all fields across all lines of the template that have become obsolete due to updates from Microsoft or third parties, or that no longer exist.

It may seem odd to encounter non-existent fields in a template, but it's important to remember that not all Business Central tables are the same. There are **regional fields** that exist for one country but not for another. It's possible to encounter non-existent fields if you've exported a template from one Business Central environment to another.

The error message for such cases would be similar to the following:



This happened because the **EXPORT_TEMPLATE** was used to export the **EXPORTITEMS** template from a European (Spanish) database to an American (USA) one, and this field only exists for European databases.



The screenshot shows a table view titled "TableData - 27". The table has several columns: "Field ID", "Field Name", "Tag", "Order", "Serie No.", and "Get From". The row with "Field ID" 4810 is highlighted in light blue. The table also includes a toolbar with options like "Field Lines", "Search", "Analyze", "New", "Edit List", "Delete", "Delete All", and a menu icon.

Field ID	Field Name	Tag	Order	Serie No.	Get From
1001	Qty. on Job Order		U		
1002	Res. Qty. on Job Order		0		
1217	GTIN		0		
1700	Default Deferral Template Code		0		
→ 4810	Exclude from Intrastat Report		0		
4811	Supplementary Unit of Measure		0		

To resolve these issues, we execute the '**Delete Obsolete / Non Existent Fields**' action and confirm the execution.

The screenshot shows the 'EXPORTITEMS' configuration window. The 'General' tab is active, displaying fields for Code (EXPORTITEMS), Source Table ID (27), Source Name (Item), Description (Template for Export Items), Operation (Insert-Modify), and Table Trigger (disabled). A confirmation dialog box is overlaid on the window, asking for confirmation to delete obsolete and non-existent fields. The dialog text reads: "This process will check for obsolete and non-existent fields in all lines of the template and delete them. Please confirm the execution!". There are 'Yes' and 'No' buttons in the dialog. The 'Yes' button is being clicked by the mouse cursor.

If there is no issue with having all the fields in the template's lines configured, the best approach is to first execute this process, and once completed, run the '**Get and Enable All Fields**' action to ensure that all fields from the current database are added.

The screenshot shows a confirmation message dialog box with an information icon and the text "5 Obsolete-Non Existent Fields Removed!". There is an 'OK' button at the bottom right of the dialog box.

OE Tables Relations Metadata 🔍 | ↗ ✕

	Table ID ↑	Table Name
<input type="radio"/>	27	Item
<input checked="" type="radio"/>	30	Item Translation
<input type="radio"/>	31	Item Picture Buffer
<input checked="" type="radio"/>	32	Item Ledger Entry
<input type="radio"/>	37	Sales Line
<input type="radio"/>	39	Purchase Line
<input type="radio"/>	83	Item Journal Line
<input type="radio"/>	90	BOM Component
<input type="radio"/>	99	Item Vendor
<input type="radio"/>	111	Sales Shipment Line
<input type="radio"/>	113	Sales Invoice Line
<input type="radio"/>	115	Sales Cr.Memo Line
<input type="radio"/>	121	Purch. Rcpt. Line
<input type="radio"/>	123	Purch. Inv. Line
<input type="radio"/>	125	Purch. Cr. Memo Line

GET TABLES RELATED

This action will display a page showing all the tables related to the template's header table, in this case, related to '**Items**'. If you select some of the lines and click **OK**, the system will ask if you want to add these tables to your template.

DELETE DATA (ENTITY)

The final action corresponds to **data deletion**. Initially, a message will appear warning that if you proceed, the **Launcher** will be displayed to execute the action, and it will ask if you are sure you want to continue. Once the **Launcher** is shown and you have selected the data to delete, the application will attempt to delete the selected data.

The deletion is subject to the **Manager's permissions** and the nature of the table (for example, movement tables cannot be deleted). Upon completion, you will be notified of the result at the top of the template or of its cancellation if the user decides not to proceed.