

CUSTOM TEMPLATES

In this section of the application, we customize the base templates and the Requests for user utilization via the '**Custom Configuration**' option or the '**Custom Templates**' cue. We also create executable template groups for webhooks or the task queue (Jobs) using the '**Template Group**' action or cue.

The first option, '**My Utilities**,' is simply a list of customized templates (**Custom Configuration**) as they will be seen by the user in their **Main Utilities** section.

The screenshot displays the 'Dashboard Manager' application window. On the left, a navigation menu is open, showing a tree structure of options. The 'Custom Configuration' option is highlighted with a mouse cursor. The main area of the dashboard features several data cards. The 'Customizations' section includes four cards: 'Clipboard Pages' (85), 'Custom Templates' (17), 'Template Groups' (1), and 'Equivalences' (0). The 'Activity' section includes three cards: 'Inbounds' (2), 'Outbounds' (1), and 'Logs' (18). Two red arrows point to the 'Custom Templates' and 'Template Groups' cards. At the bottom, there is a 'Utilities' section with a table for 'Main Utilities' and a table for 'Open Entity Background Notifications'. A 'Close' button is located in the bottom right corner.

Description	Folder	Action	Run Type

Date	Time	Source	Message	Result	Track

CUSTOM CONFIGURATION

Custom templates will essentially define an action or override the properties of a base template **FOR A SPECIFIC USER**. For example, the action to be performed (copy-paste, export, save-file, etc.) and/or its properties, such as the export destination, the 'perspective' of that export, whether a selector or launcher-type page will be used, and the type of viewer for information requests.

The purpose is to save time and simplify the action for regular users, avoiding potential mistakes in their operations. For instance, in a hypothetical export, by configuring the **'Target Template'** section, we can spare the user from the cumbersome process of selecting the tenant, company, and export template if it has been set with the **'Transform at'** field as **'Target'**. Additionally, we can customize which type of page a user will use to execute a task, whether it be the **Selector** or **Launcher**, and which sections (**Filters, Replace, Parameters, Tables**) they will be able to view.

When clicking on the **'Custom Configuration'** action or the **'Custom Templates'** cue, a list of existing custom templates will appear.

OE List Custom Templates

Code ↑	User	Template Type	Source Template Code	Action	Requester	Description	Order	Use-Crea... Equi...	Folder	Ena...	Groups
→ CT-0001	⋮ OE MANAGE...	Base	CUSTEXPORTEQ	Export	Selector	Propagate customers to	0	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	1
CT-0002	NOMADAWA...	Base	CUSTOMEREXPORT	Copy-Paste	Clipboard	Customers for Clipboard	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0
CT-0004	TOLO.SASTRE	Base	CUSTEXPORTEQ	Export	Selector	Propagate customers to	0	<input checked="" type="checkbox"/>	EXPORTS	<input checked="" type="checkbox"/>	0
CT-0005	TOLO.SASTRE	Base	CUSTOMEREXPORT	Copy-Paste	Clipboard	Customers for Clipboard	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0
CT-0006	TOLO.SASTRE	Base	CUSTOMEREXPORT	Export	Selector	Export Customers to SandboxD...	0	<input type="checkbox"/>	EXPORTS	<input checked="" type="checkbox"/>	0
CT-0007	TOLO.SASTRE	Base	CUSTNEWDISCOUNTS	Run Process	Launcher	New promotional spring2024 D...	0	<input type="checkbox"/>	PROCESSES	<input checked="" type="checkbox"/>	0
CT-0008	TOLO.SASTRE	Base	SALESORDERTOENDOR	Export	Launcher	Collect products from sales ord...	0	<input type="checkbox"/>	EXPORTS	<input checked="" type="checkbox"/>	0
CT-0009	TOLO.SASTRE	Base	CP-COPYSALESORDERS	Copy-Paste	Clipboard	Copy-Paste Sales Orders as is.	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0
CT-0010	TOLO.SASTRE	Base	COPYSALESORDERS	Copy-Paste	Launcher	Copy orders sales more sophist...	0	<input type="checkbox"/>	COPYPASTE	<input checked="" type="checkbox"/>	0
CT-0011	TOLO.SASTRE	Base	MODIFYITEMS	Run Process	Launcher	Modify some Posting Group an...	0	<input type="checkbox"/>	PROCESSES	<input checked="" type="checkbox"/>	0
CT-0012	TOLO.SASTRE	Base	MODIFYSALELINES	Run Process	Launcher	Put Location in some Sale Lines...	0	<input type="checkbox"/>	PROCESSES	<input checked="" type="checkbox"/>	0
CT-0013	TOLO.SASTRE	Base	JOBSEXPORT	Export	Selector	Export Projects	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0
CT-0014	TOLO.SASTRE	Base	JOBSEXPORT	Export	Launcher	Export Jobs making Equivalences	0	<input checked="" type="checkbox"/>	EXPORTS	<input checked="" type="checkbox"/>	0
CT-0015	TOLO.SASTRE	Request	RQCUSTOMERSBALANCE	Request	Launcher	Request to SandboxDev-Cronu...	0	<input type="checkbox"/>	REQUESTS	<input checked="" type="checkbox"/>	0
CT-0016	TOLO.SASTRE	Request	RQITEMS	Request	Launcher	Inventory and Purchases-Sales i...	0	<input type="checkbox"/>	REQUESTS	<input checked="" type="checkbox"/>	0
CT-0017	TOLO.SASTRE	Base	EXPORTJOURNALS	Export	Launcher	Export Journals to a SandboxDe...	0	<input type="checkbox"/>	EXPORTS	<input checked="" type="checkbox"/>	0
CT-0018	TOLO.SASTRE	Base	SALESORDERTOENDOR	Run Process	Launcher	Create an unique Order from ot...	0	<input type="checkbox"/>		<input checked="" type="checkbox"/>	0

By clicking on the **NEW** or **Edit** action in the **Custom Configuration** list, you will access the card to create or edit a Custom Template with four distinct sections:

GENERAL SECTION

- **'Code'**: If a series number has been assigned in the **'OE Setup'** page, in the **'Series & Others'** section, simply validating the field without any value will add a new code (series). You can also manually create one.
- **'User'**: This specifies the user who will be able to execute the custom template being created.
- **'Template Type'**: Values are **Base** or **Request**. The selection of this type will determine what is shown in the following field.
- **'Template Code Source'**: This is the base template or request that will be executed.
- **'Description'**: This field is crucial because it will be the label that the user sees in their **Main Utilities** section or in any folder we have created.
- The fields **'Action'**, **'Operation'**, **'Run Type'**, **'Transform at'**, **'Table Trigger'**, **'Destination Execution'**, **'Use-Create Equivalence'**, and **'Enabled'** defined in the custom template will override the base template when executed, or allow it to be organized within the **Custom Templates** list or in a folder (**'Folder'** and **'Order'**).
- **Groups**: Indicates how many groups are using the current custom template.

TARGET TEMPLATE SECTION

The target fields in this section specify that for an **Export** action or **Process Execution**, a **Target Template** must be used to perform the operation.

If the action is **Run Process**, you will typically assign the current Tenant and Company along with one of your other templates that does not match the data selection performed by the Base Template. If both templates match, no special action is needed, and this section does not require configuration.

For exports, this indicates the Tenant, Company, and Template to which the operation should be directed.

EXCEL and REQUESTER-VIEWER PAGE SECTIONS

These sections are almost identical to those in the Base Template, and their configurations will override the base template.

- The **'Show Viewer'** field in the **REQUESTER** section allows you to select the data display page for Requests. If left blank, the display page will be the one configured in the **'OE Setup'** page.
- The **'Requester'** field adds a value called **'Clipboard'** in the custom templates. If this option is selected, the template can only be used on these types of pages (accessible from the main standard lists in Business Central) and will not be visible to the user in the **Main Utilities** or **Folders** section.
- The moment the **Enabled** field of a **Custom Template** is activated, it becomes accessible to the user and will be visible in the configured sections (**Main Utilities** or **Clipboard Page**).



CT-0018

Run | More options

General

Code	<input type="text" value="CT-0018"/>	Transform at (*)	<input type="text" value="Target"/>
User	<input type="text" value="TOLO.SASTRE"/>	Table Trigger	<input type="checkbox"/>
Template Type	<input type="text" value="Base"/>	Destination Execution	<input checked="" type="checkbox"/>
Source Template Code	<input type="text" value="SALESORDERTOVEDOR"/>	Use-Create Equivalence	<input type="checkbox"/>
Description	<input type="text" value="Create an unique Order from other documents"/>	Folder	<input type="text"/>
Source Name	<input type="text" value="Customer"/>	Order	<input type="text" value="0"/>
Action (*)	<input type="text" value="Run Process"/>	Enabled	<input checked="" type="checkbox"/>
Operation (*)	<input type="text" value="Insert-Modify"/>	Groups	<input type="text" value="0"/>
Run Type (*)	<input type="text" value="Normal"/>		

Target Template

Target Tenant	<input type="text" value="NOMADSERVICES"/>	Target Template Code	<input type="text" value="SALEORDERFROMCUST"/>
Target Company	<input type="text" value="CRONUS ES"/>		

Excel

File Name	<input type="text"/>	Include Indentation	<input type="checkbox"/>
Name of Sheet	<input type="text"/>		

Requester-Viewer Page

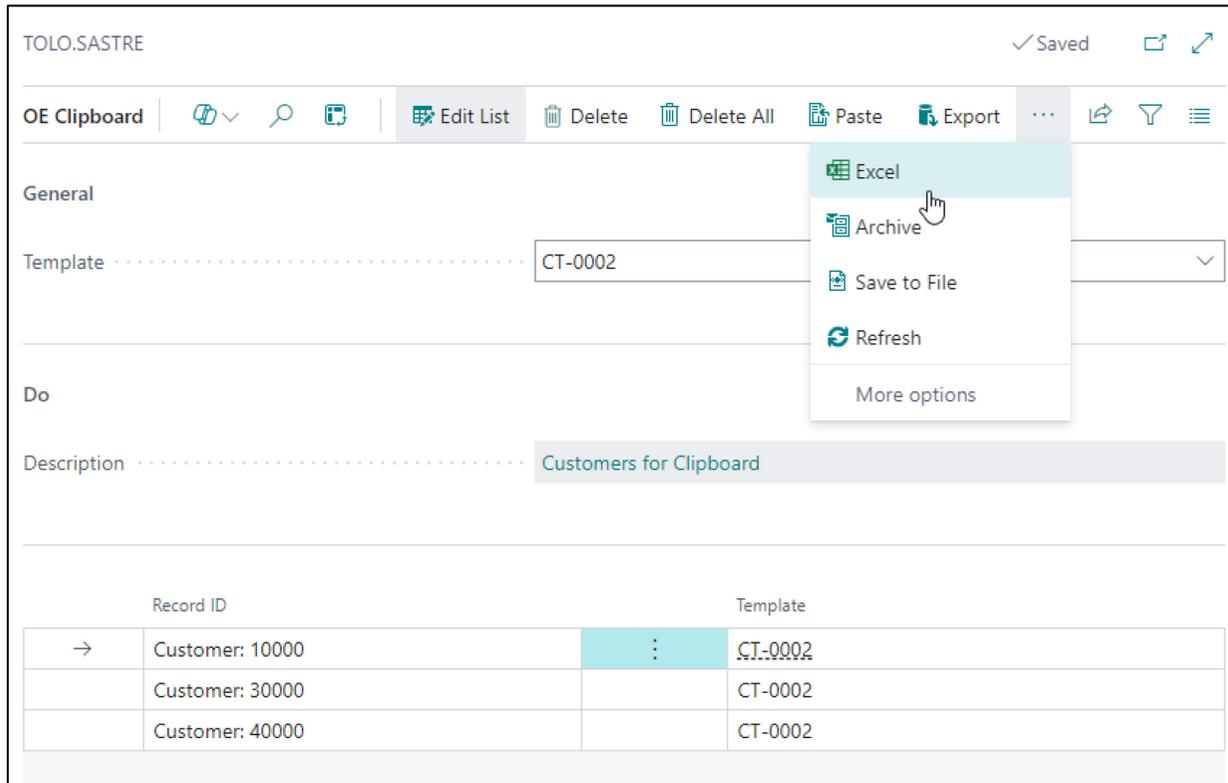
Requester	<input type="text" value="Launcher"/>	Hide Parameters	<input checked="" type="checkbox"/>
Some fields (*) can automatically change their value to other predefined in the clipboard page!		Hide tables section in launcher	<input checked="" type="checkbox"/>
Hide Replace	<input type="checkbox"/>	Show Viewer	<input type="text" value="Grid"/>
Hide Filters	<input type="checkbox"/>		

In the last section, a message can be seen warning that some fields (marked with an asterisk) may change their values if the selected page (**Requester**) is of the **Clipboard** type. This happens because, on the clipboard page, there may be several actions available, such as copy-paste, export, etc., and it will be the user's choice which actions to execute. Additionally, actions like **Copy-Paste** always perform the operation '**Only Insert,**' and processes executed from the clipboard always run in the background.

MY UTILITIES

This section simply displays all the custom templates for all users. The only field that can be modified in this list is the '**Folder**' field.

You can execute custom templates from the **Custom Configuration** list or card, in the **Main Utilities** section, or from the user's **Folders** using the **Run** action. On the **Clipboard** page, after selecting the template to be executed, you can use the actions shown at the top of the page to proceed with the execution.



The screenshot shows the TOLO.SASTRE application interface. At the top, there is a header with the user name 'TOLO.SASTRE' and a 'Saved' status. Below the header is a navigation bar with various icons and buttons, including 'Edit List', 'Delete', 'Delete All', 'Paste', 'Export', and a three-dot menu. The main content area is divided into sections: 'General', 'Do', and 'Description'. The 'Template' field is set to 'CT-0002'. The 'Description' field is 'Customers for Clipboard'. Below this is a table with columns 'Record ID' and 'Template'. The table contains three rows of data. A context menu is open over the first row, showing options: 'Excel', 'Archive', 'Save to File', 'Refresh', and 'More options'.

Record ID	Template
→ Customer: 10000	CT-0002
Customer: 30000	CT-0002
Customer: 40000	CT-0002

TEMPLATE GROUP

The **Template Group** is a template that is executed only via a webhook service, a scheduled task (job queue), or manually by the Manager using the **Run** action from the **Template Groups** list or card. It contains one or more **Custom Templates** to which a **weekly schedule** has been added.

This is used to perform a group of actions (execution of several custom templates) when a scheduled task or subscribed webhook is triggered. For example, if the webhook service is triggered due to an item modification, you can configure it so that the product is exported to two or more specific companies (using multiple Custom Templates) if the webhook configuration assigns that group for execution.

Job Queue Entries

Stat...	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description
Ready	TOLO...	Codeunit	72139596	NOW Export Replication (Job)	OE-Export Automated Replication Templat...
Ready	TOLO...	Codeunit	72139591	NOW Delete-Clear Entities	OE-Delete or Clear Out the Entries of I/O f...
Ready	TOLO...	Codeunit	72139586	NOW Entity Programmed (Job)	OE-Process Entities Queued(Programmed).
Ready	TOLO...	Codeunit	72139588	NOW AutoRenew Webhooks	OE-Auto Renew Webhooks Subscribed
→ Ready	TOLO...	Codeunit	72139595	NOW Template Group (Job)	OE-Run Automated Template Groups (Job).

The following template includes two almost identical custom templates, where only the export destination has been changed.

Group Header

JOB-ITEMS

Run | More options

General

Code JOB-ITEMS Webhooks 0

Description Group of actions to run when trig... Enable

Allow Job Queue Proc...

Lines | New Line | Delete Line

Custom Template Code	Description	Action	Order ↑	Ena...	Mo...	Tue...	We...	Thu...	Friday	Sat...
CT-0001	Export Items for CRONUS ES	Export	10	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ CT-0002	Export Items to SandboxDev	Export	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

GENERAL SECTION

After entering a code for the Group and providing a descriptive explanation, the '**Allow Job Queue Process**' field and the '**Enabled**' field in the General section have been activated, allowing the scheduled task to execute the lines or Custom Templates. Additionally, the lines must have their **Enabled** field active and at least one day of the week scheduled. If no days are selected, the scheduled task will never execute them.

The **Webhooks** field in the General section informs us how many of these change notification services are configured to execute the current Group. If the group is executed by a webhook, the weekly schedule is not considered.

GROUP TEMPLATE DELETION

When deleting a Template Group, it will ask for confirmation, warning that the lines will be deleted and that all webhooks configured with this group will have their value removed from their configuration line (in the **Group** field).

GROUP CODE CHANGE (RENAME)

When changing the code of a Group, confirmation will be requested, informing you that the lines will be updated with the new code and that any webhooks with the previous code will be updated to the new one (in the **Group** field).

LINES SECTION

In the **Custom Template Code** column, you enter the code of the desired **Custom Template**, and its description and action will automatically populate.

IMPORTANT: Neither the webhook service nor the scheduled tasks (job queue) allow any user interface (pages, messages, etc.). Therefore, if the Custom Template has the '**Requester-Viewer Page**' section with the **Requester** field set to '**Selector**' or '**Launcher**,' there is no issue, but they will simply be ignored. This also means that all necessary parameters for executing the action must be properly completed.

- **Enabled:** Activates the Custom Template line to allow its processing.
- **Days of the Week:** Allows the action (Jobs) to be processed if it coincides with the marked days of the week (schedule).