



Microsoft Dynamics® GP
Extender User's Guide

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Publication date

July 2009

Contents

Introduction.....	5
What's in this manual	6
Symbols and Conventions.....	7
Part 1: Using Extender	8
Chapter 1: Extender Interface	9
Displaying resources	9
Adding new resources.....	10
Opening existing resources	10
Copying existing resources	10
Printing resource lists.....	11
Displaying more information about a resource.....	11
Chapter 2: Security.....	12
Adding resources to security tasks.....	12
Chapter 3: Import and Export	13
Exporting Extender resources	13
Importing Extender resources	14
Part 2: Extender Concepts.....	15
Chapter 4: Field Types	16
Short String	16
Long String	17
Checkbox	17
Date	17
Time	17
Phone Number	17
Email	18
File	19
Folder	19
Number	19
Currency.....	19
Quantity	20
Percentage.....	20
Lookup.....	20
Linked Lookup.....	21
List	21
Calculated Field	22
Chapter 5: Terminology	24

Part 3: Data Entry.....	25
Chapter 6: Windows.....	26
Adding a new Window	27
Using Windows.....	29
Modifying an existing Window	29
Setting Window options.....	30
Adding Window fields to SmartList	31
Creating Window templates.....	33
Setting Window template options	35
Using Window templates	35
Table Links	36
Moving Fields	37
Removing Windows	38
Chapter 7: Detail Windows.....	39
Adding a new Detail Window.....	39
Using Detail Windows.....	42
Modifying an existing Detail Window.....	42
Setting Detail Window options	43
Creating Detail Window templates	45
Setting Detail Window template options	47
Using Detail Window templates	47
Table Links	48
Moving Fields	49
Removing Detail Windows.....	50
Chapter 8: Notes.....	51
Adding a new Notes window	51
Key Fields	52
Note Types.....	53
Using Notes windows	53
Modifying an existing Notes window	55
Table Links	56
Removing Notes windows	57
Chapter 9: Inquiries.....	58
Adding a new Inquiry	58
Modifying an existing Inquiry	59
Setting Inquiry options.....	59
Alternate Keys	61
Removing Inquiries.....	62
Chapter 10: Window Groups	63
Adding a new Window Group	64
Adding windows to a Window Group	65
Setting Window Group options	66
Modifying an existing Window Group.....	67
Removing Window Groups	68

Chapter 11: Forms.....	69
Adding a new Form	69
Using Forms.....	71
Duplicating Form Records	72
Modifying an existing Form	72
Adding extra windows to a Form.....	72
Setting Form options.....	76
Creating Form templates.....	78
Setting Form template options	79
Using Form templates	80
Removing Forms.....	81
Chapter 12: Detail Forms.....	82
Adding a new Detail Form.....	83
Using Detail Forms	84
Modifying an existing Detail Form.....	85
Adding extra windows to a Detail Form.....	85
Setting Detail Form options	88
Creating Detail Form templates	90
Setting Detail Form template options	92
Using Detail Form templates	93
Removing Detail Forms.....	94
Part 4: Data Entry Tools.....	95
Chapter 13: Lookups	96
Adding a new Lookup.....	96
Modifying an existing Lookup.....	97
Removing Lookups.....	97
Chapter 14: Imports	98
Adding a new Import	98
Using Imports	99
Modifying an existing Import	100
Removing Imports	100
Chapter 15: Menus	101
Adding a new Menu.....	101
Modifying an existing Menu.....	102
Sorting Menu items.....	103
Removing Menus.....	103
Part 5: Automation	104
Chapter 16: Macros	105
Adding a new Macro.....	105
Modifying an existing Macro.....	106
Removing Macros.....	106
Chapter 17: Dialogs	107
Adding a new Dialog	107
Modifying an existing Dialog	108
Removing Dialogs	109

Part 6: Reports.....	110
Chapter 18: Views.....	111
Adding a new View	111
Previewing a View.....	113
Modifying an existing View	114
Removing Views.....	115
Part 7: Maintenance	116
Chapter 19: Check Links.....	117
Checking Links	117
Chapter 20: Edit Values	118
Editing Values.....	118
Filling Values.....	118
Changing Values.....	119
Chapter 21: Options	120
Setting Options	120
Auto-update SmartList.....	120
Write Back Unused Field IDs	120
Appendix A: Adding Extender Window fields to Report Writer reports	121
Adding fields to a Microsoft Dynamics GP report	121
Adding Extender Window (with multiple keys) fields to a Microsoft Dynamics GP report.....	123

Introduction

Welcome to Extender, a simple yet powerful tool to extend the functionality of Microsoft Dynamics® GP. Extender allows you to create additional data entry windows to extend the information that can be captured in Microsoft Dynamics GP. There are five ways that Extender can be used to add new data entry capabilities to Microsoft Dynamics GP:

- Extender Windows are used to link new data to existing Microsoft Dynamics GP windows. You should use an Extender Window when an existing Microsoft Dynamics GP window does not contain all of the data that you need to track. For example, you could use Extender Windows to create a new window to track additional information against inventory items.
- Extender Detail Windows are used to link new detail records to existing Microsoft Dynamics GP windows. You should use an Extender Window when you want to track multiple records against an existing Microsoft Dynamics GP. For example, you could use an Extender Detail Window to create a new window to track multiple contacts against a customer or vendor.
- Extender Notes window allow you to attach multiple notes to a Microsoft Dynamics GP window. For example, you could use an Extender Note to record correspondence details against a customer or vendor.
- An Extender Form creates a standalone data entry form. Unlike Extender Windows, Extender Forms do not have to be attached to an existing Microsoft Dynamics GP window. Extender Forms can be used to track any type of master file or transaction information that is not already stored in Microsoft Dynamics GP. For example, you could use an Extender Form to store worksheet or job details.
- An Extender Detail Form allows you to create a standalone data entry form with a header record and detail line items. Extender Detail Forms can be used to track any type of master file or transaction information that requires line items. For example, you could use an Extender Detail Form to store sales budgets with line items on each budget for each salesperson or sales territory.

Before you put Extender to work for you, take a few moments to review the information presented here. Understanding the organization can provide you with the proper approach to the Extender documentation.

This introduction is divided into the following sections:

[What's in this manual](#)
[Symbols and Conventions](#)



What's in this manual

The Extender Manual is designed to give you an in-depth understanding of how to use Extender. The manual contains the following parts:

- [Part 1, Using Extender](#), shows you how to start using Extender.
- [Part 2, Extender Concepts](#), outlines the field types and terminology that are used throughout Extender.
- [Part 3, Data Entry](#), shows how to create data entry screens using Extender.
- [Part 4, Data Entry Tools](#), provides details for tools that can be used to enhance the data entry screens created with Extender.
- [Part 5, Automation](#), shows how to set up Extender automation features.
- [Part 6, Reports](#), shows how to create reports from Extender data entry screens.
- [Part 7, Maintenance](#), shows how to run maintenance routines in Extender.

Symbols and Conventions

This manual uses the following symbols to make specific types of information stand out.

Symbol	Description
	The light bulb indicates helpful tips, shortcuts and suggestions.
	The warning symbol indicates situations you should be aware of when completing tasks. Typically, this includes cautions about performing steps in their proper order, or important reminders about how other information in Microsoft Dynamics GP may be affected.

Convention	Description
Part 4, Data Entry	Bold type indicates a part name
Chapter 8, “Windows”	Quotation marks indicate a chapter name
EXTENDER.EXE	Words in uppercase indicate a file name
TAB or CTRL+M	Small capital letters indicate a key or key sequence.

Part 1: Using Extender

This portion of the manual describes how get started using Extender. The information is divided into the following chapters:

- [Chapter 1, “Extender Interface”](#), describes how to navigate using the main Extender interface.
- [Chapter 2, “Security”](#), describes assigning security to Extender objects.
- [Chapter 3, “Import and Export”](#), describes how to export Extender setup details to an XML file and importing Extender setup details from an XML file.

Chapter 1: Extender Interface

This chapter describes how to use the Extender resource explorer. The resource explorer is the primary point of navigation in Extender. You will use it for virtually all tasks in Extender.

Information about the Extender interface is divided into the following sections:

[Displaying resources](#)

[Adding new resources](#)

[Opening existing resources](#)

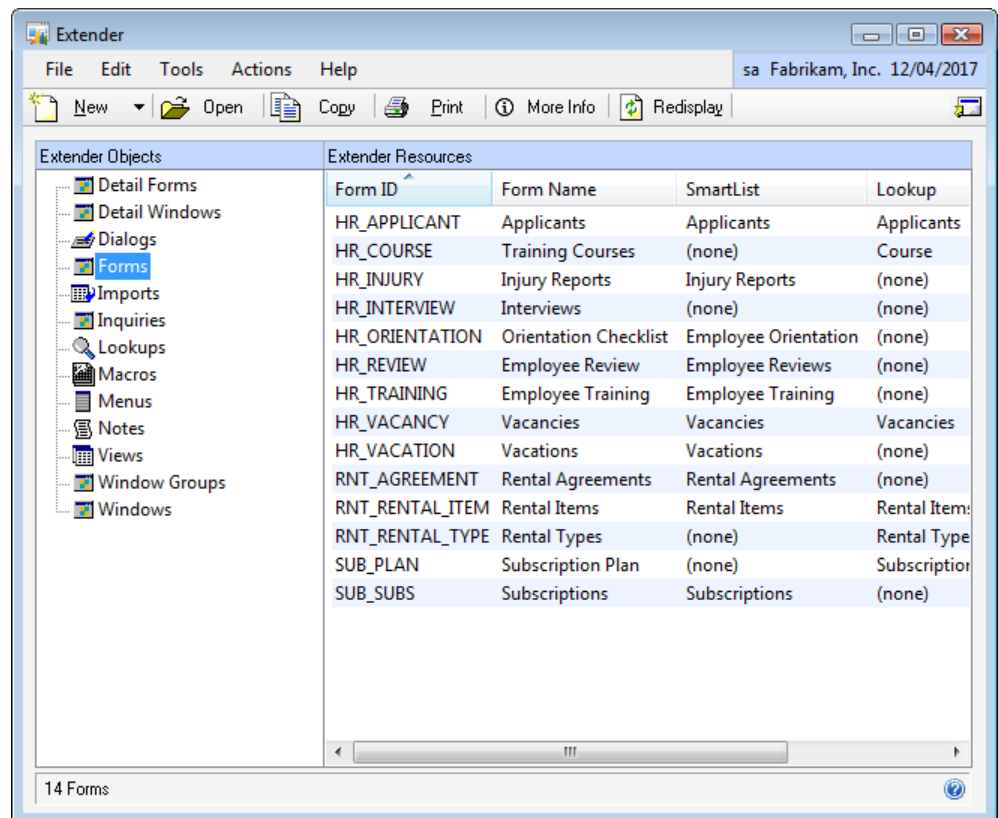
[Copying existing resources](#)

[Printing resource lists](#)

[Displaying more information about a resource](#)

Displaying resources

The resource explorer is divided into two panels; the Extender Objects list and the Extender Resources list.



The Extender Objects list displays all resource types. The Extender Resources list displays all resources for the selected Extender Object.

To display a list of resources:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select the object type from the Extender Objects list

Adding new resources

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

To add a new resource:

1. Select the object type from the Extender Objects list
2. Click New or enter CTRL+N.

Opening existing resources

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

To open an existing resource:

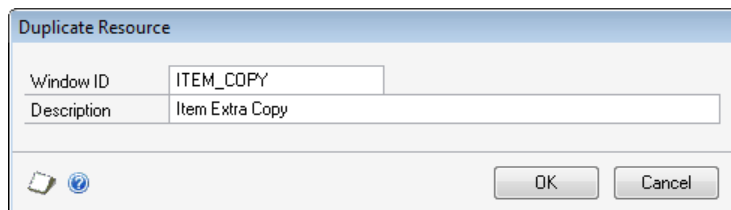
1. Select the object type from the Extender Objects list.
2. Select the resource that you want to open from the Extender Resources list.
3. Click Open or enter CTRL+O.

Copying existing resources

If you want to create an exact duplicate of a resource that has been previously created, you can use the copy feature of Extender.

To copy an existing resource:

1. Select the object type from the Extender Objects list.
2. Select the resource that you want to copy from the Extender Resources list.
3. Click Copy.



4. Enter the new resource ID in the Duplicate Resource window.
5. Enter the new resource name in the Duplicate Resource window.
6. Click OK.

Printing resource lists

You can use the Print button to print information about the resources that are currently displayed in the resource list.

To print a list of resources:

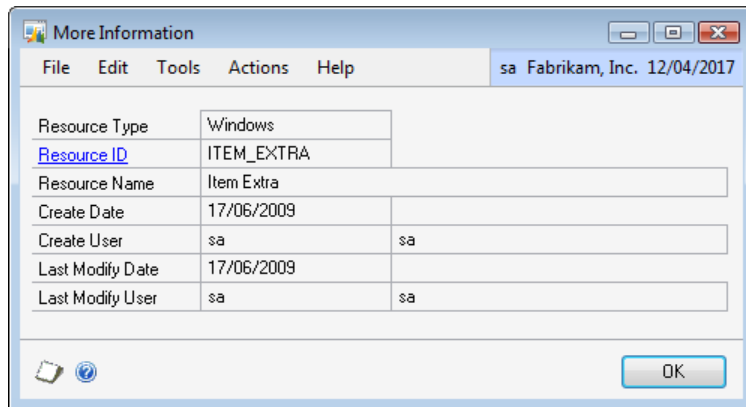
1. Select the object type from the Extender Objects list.
2. Click Print or enter CTRL+P.

Displaying more information about a resource

The resource list shows information relating to the selected Extender object. The More Information window shows details of the creation and last modification of the resource.

To display more information about a resource:

1. Select the object type from the Extender Objects list.
2. Select the resource that you want more information about.
3. Click More Info or enter CTRL+M.



Chapter 2: Security

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

Adding resources to security tasks

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

To add a resource to a security task:

1. Open the Security Task Setup form (Microsoft Dynamics GP menu >> Tools >> Setup >> System >> Security Tasks).

The screenshot shows the 'Security Task Setup' window. At the top, there's a menu bar with 'File', 'Edit', 'Tools', and 'Help'. Below that is a toolbar with 'Save', 'Clear', 'Delete', and 'Copy'. The main form area has several fields: 'Task ID' (EXTENDER), 'Task Name' (Extender), and 'Task Description' (Extender). There are also dropdown menus for 'Product' (Extender), 'Type' (Extender Resources), and 'Series' (Forms). To the right of these dropdowns are 'Mark All' and 'Unmark All' buttons. Below this is the 'Access List' section, which has a sub-section for 'Operations'. This section contains a list of operations with checkboxes: 'Applicants' (unchecked), 'Employee Review' (checked), 'Employee Training' (checked), 'Injury Reports' (unchecked), 'Interviews' (checked), 'Orientation Checklist' (unchecked), 'Rental Agreements' (unchecked), and 'Rental Items' (unchecked). At the bottom of the 'Operations' list is a 'Print Operation Access' button. The window title bar shows 'sa Fabrikam, Inc. 12/04/2017'.

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

Chapter 3: Import and Export

Extender resources can be exported to an XML file to easily transfer resource definitions between Microsoft Dynamics GP companies and to distribute Extender applications to multiple Microsoft Dynamics GP sites.

This information is divided into the following sections:

[Exporting Extender resources](#)

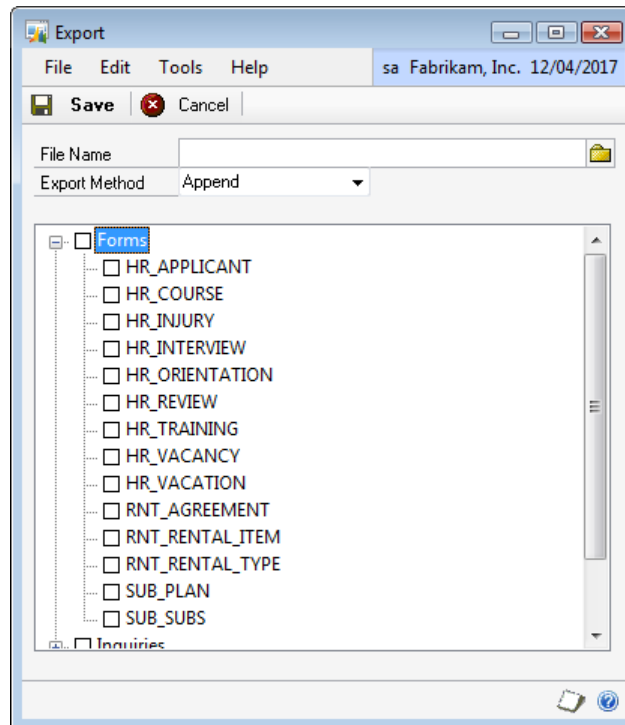
[Importing Extender resources](#)

Exporting Extender resources

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

To export resources:

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



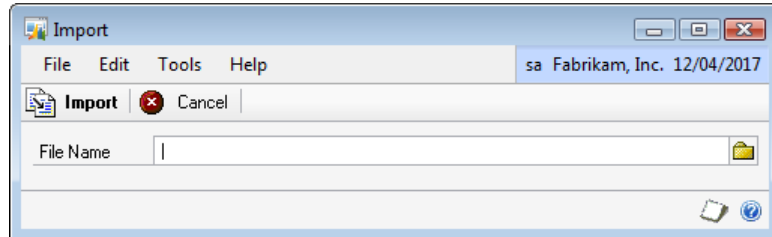
3. Enter the File Name.
4. Select the Export Method.
5. Mark the Extender resources that you want to export.
6. Click Save.

Importing Extender resources

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

To import resources:

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



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

Part 2: Extender Concepts

This portion of the manual describes the field types and terminology that are used throughout Extender.

The information is divided into the following chapters:

- [Chapter 4, “Field Types”](#), describes how to set up and use fields in Extender
- [Chapter 5, “Terminology”](#), describes terminology that is used by Extender

Chapter 4: Field Types

This chapter describes the field types that are available in Extender and how each field type can be applied. This information is divided into the following sections:

- [Short String](#)
- [Long String](#)
- [Checkbox](#)
- [Date](#)
- [Time](#)
- [Phone Number](#)
- [Email](#)
- [File](#)
- [Folder](#)
- [Number](#)
- [Currency](#)
- [Quantity](#)
- [Percentage](#)
- [Lookup](#)
- [Linked Lookup](#)
- [List](#)
- [Calculated Field](#)

Short String

A short string field allows for up to 30 characters to be entered. When creating a short string field, you may want to restrict the types of strings that can be entered. You can do this by selecting a string format for the field. There are five formats that can be applied to a short string:

No format – all characters are accepted (default)

Numeric Only – when selected, only numeric characters (0-9) characters are accepted

Uppercase Only – when selected, all alphabetic characters are displayed in uppercase

Alphanumeric Only – when selected, only letters and numbers can be entered

Alphanumeric Uppercase Only – when selected, only letters and numbers can be entered, and all alphabetic characters are displayed in uppercase

You can also apply a mask to a short string. A mask is used to add static characters to a string, such as parentheses, spaces or dashes. A capital X is used as a placeholder to represent alphanumeric characters that will appear in the string. All other characters will be used to change the way the string is displayed after it has been entered. For example:

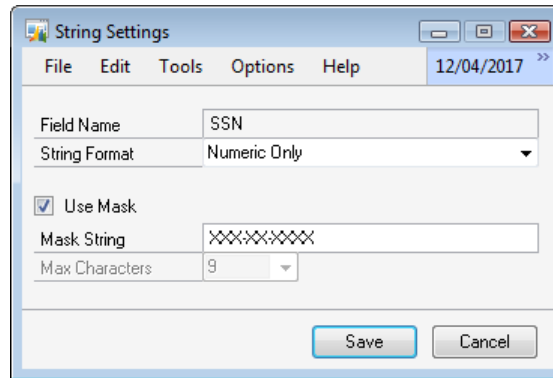
Mask	String	Formatted String
XXX-XXXX-XX	123456789	123-4567-89
q: XXX (X)	ABCD	q: ABC (D)

If you are not using a string mask, you can select the maximum number of characters that

can be entered into the string field. The maximum number of characters will default to 30 if not selected.

To select string settings:

1. Click the expansion button.



2. Select the String Format.
3. If you want to use a string mask, mark the Use String checkbox and enter the String Mask.
4. If you do not want to use a mask, select the maximum number of characters.

Long String

A long string field allows for up to 255 characters to be entered.

Checkbox

A checkbox field is used to record a true/false value.

Date

A date field allows entry and validation of a date value.

Time

A time field allows entry and validation of a time value in a 24-hour format.

Phone Number

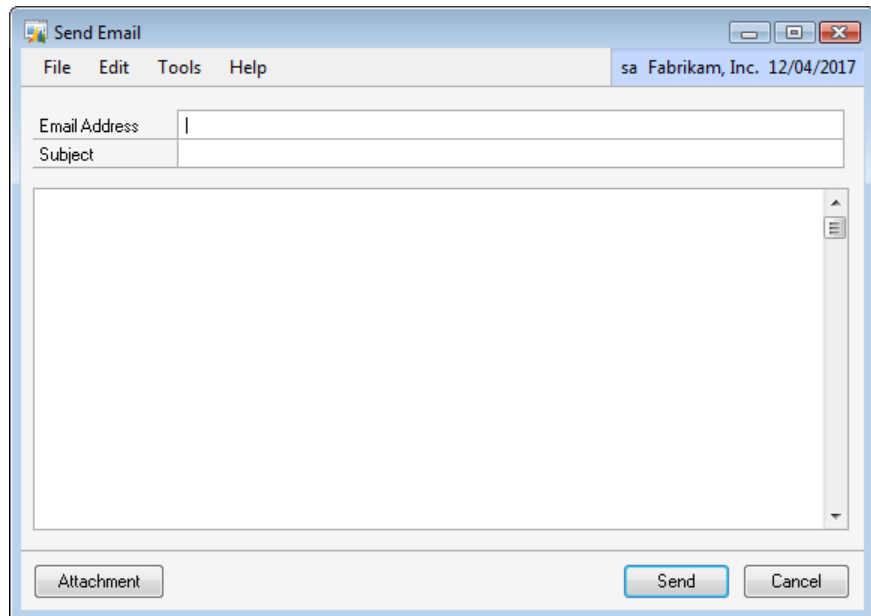
A phone number field allows for entry of a phone number formatted in your chosen Microsoft Dynamics GP phone number format.

Email

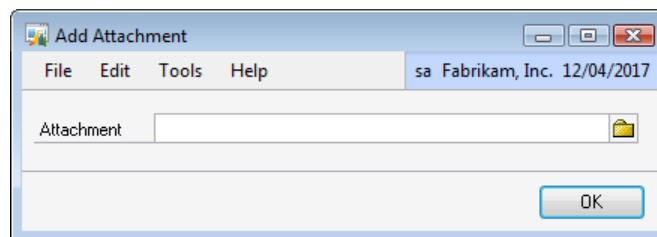
An email field allows entry of an email address. When an email field is added to an Extender resource, you can use this field to send emails.

To send an email from an email field:

1. Click the Email field prompt



2. Enter the email Subject.
3. Enter the email body.
4. Click the Attachment button, enter a filename, and click OK if you want to add an attachment.



5. Click Send.

File

A file field is used to enter file locations. When a file field is added to an Extender resource, you can use this field to open the file.

To open a file:

1. Click the File field prompt.



The file will be opened using the default application associated with the file extension

Folder

A folder field is used to enter folder locations. When a folder field is added to an Extender resource, you can use this field to open the folder using Windows® Explorer.

To open a folder:

1. Click the Folder field prompt.



If you enter a web address in a folder field, the site will be opened using your default web browser

Number

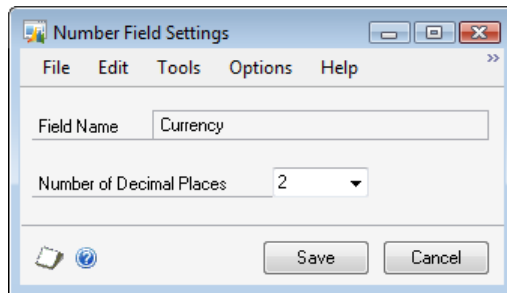
A number field is used to enter numbers with no decimal places.

Currency

A currency field is used to enter currency amounts. You can select the number of decimal places for a currency field as a number between 0 and 5.

To set currency options:

1. Click the expansion button.



2. Select the number of decimal places.
3. Click Save.

Quantity

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

To set quantity options:

1. Click the expansion button.
2. Select the number of decimal places.
3. Click Save.

Percentage

A percentage field is used to enter percentage amounts. You can select the number of decimal places for a percentage field as a number between 0 and 5.

To set percentage options:

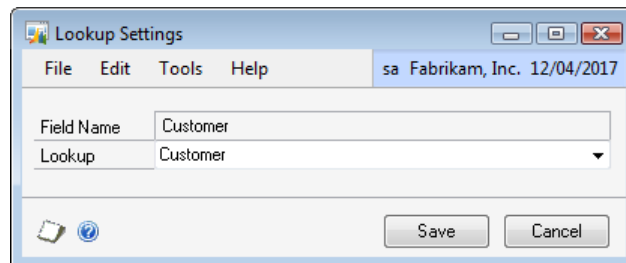
1. Click the expansion button.
2. Select the number of decimal places.
3. Click Save.

Lookup

A lookup field provides a lookup button to open a lookup window to choose values from existing information. The standard lookups that are available are Customer, Vendor, Item, User, Employee, Department, Position, Company, Paycode, Tax Schedule, Salesperson, Site, Sales Territory, User Class, Item Class, Customer Class, Employee Class and Prospect.

To set lookup options:

1. Click the expansion button.



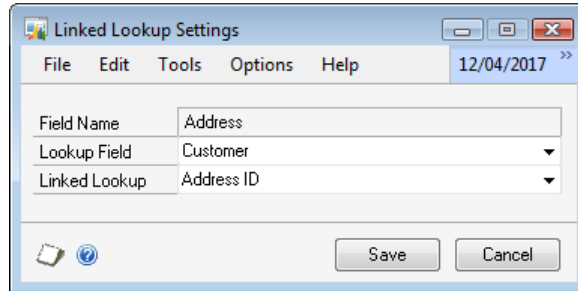
2. Select the Lookup.
3. Click Save.

Linked Lookup

A linked lookup allows you select a lookup that is related to another lookup. The linked lookups that are available are Customer Addresses, Vendor Addresses, Vendor Items and Item Units of Measure.

To set linked lookup options:

1. Click the expansion button.



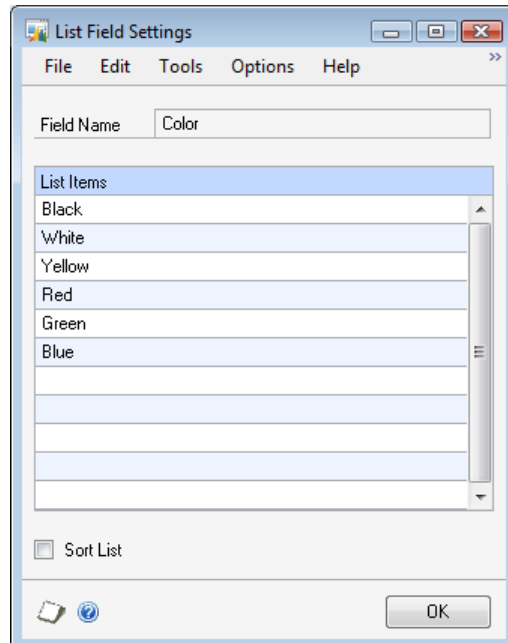
2. Select the Lookup Field to link to.
3. Select the Linked Lookup.
4. Click Save.

List

A list field provides a drop down list of values. You can use the List Field Settings window to add list items and set the sort order.

To set list options:

1. Click the expansion button.



2. Enter List Values.
3. Mark the Sort List option if you want list to be sorted alphabetically.
4. Click Save.

To copy an existing list:

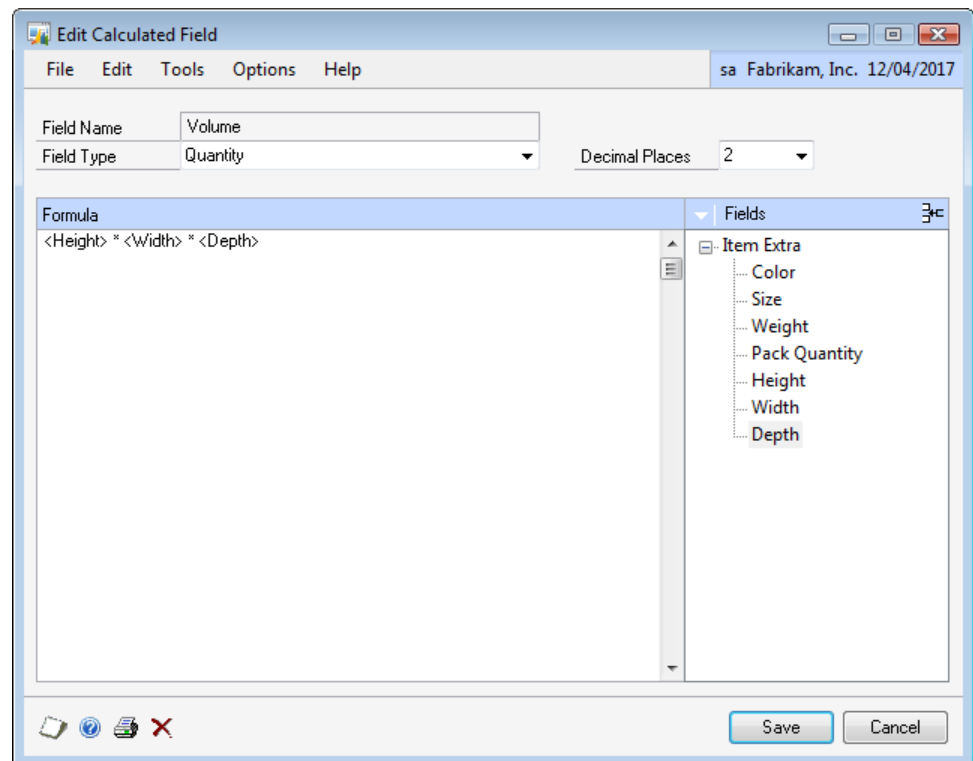
1. Click the Copy button above the List Values list.
2. Select the list that you want to copy.

Calculated Field

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

To add a calculated field:

1. Click the expansion button.



2. Select the field type.
3. Enter the script for the calculation. Add fields to the calculation by double-clicking on a field from the Fields list. Add functions to the calculation by double-clicking on a function from the Functions list. The Functions list is displayed by selecting Functions from the View button above the Fields list.
4. Click Save.

Functions

Extender calculated fields can use all of the functions that are available in Transact-SQL. For convenience, the most common of these functions have been added to the functions list on the Edit Calculated Field window. These functions are divided into five areas:

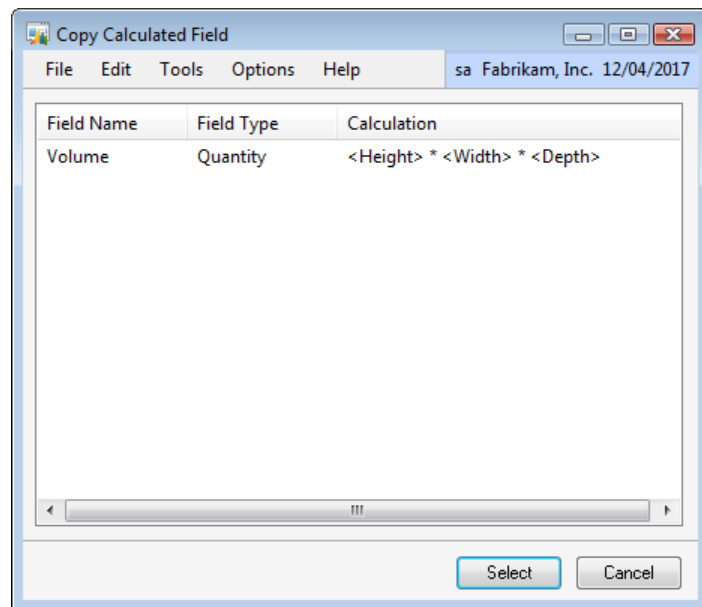
Arithmetic Operators
Date Functions
Mathematical Functions
System Functions
String Functions

Copying Calculated Fields

You can copy the setup of a calculated field from other calculated fields. This is especially useful when you have a complex calculation that is performed in more than one place in your Extender application.

To copy an existing calculated field:

1. Select Additional >> Tools >> Copy Calculated Field to open the Copy Calculated Field dialog.



2. Select the Calculation from the list of calculations.

3. Click Select.

Removing Calculated Fields

Removing a calculated field removes all calculations. You may need to do this to recreate a calculated field after you have made changes to the Extender resource.

To remove a calculated field:

1. Click Delete at the bottom left of the Edit Calculated Field window.

Chapter 5: Terminology

This chapter describes the terminology that is used throughout this manual and throughout Extender.

Products

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

Series

A series is a group used to organize resources.

Forms

A form is a collection of related data entry screens.

Windows

A window is a single data entry screen.

Key Fields

Key fields are used to assign a unique identifier from a Microsoft Dynamics GP window to an Extender record. For example, for the Customer Maintenance form, the Key Field is the Customer Number. There can be one or more key fields assigned to create a unique identifier. For example, on the Customer Address Maintenance, the key fields would be the combination of Customer Number and Address ID.

Hot Keys

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

Part 3: Data Entry

This portion of the manual describes the features of Extender that can be used to create new data entry objects. With Extender, you can attach new data entry and notes windows to existing Microsoft Dynamics GP.

The information is divided into the following chapters:

- [Chapter 6, “Windows”](#), describes how to attach a new window to an existing Microsoft Dynamics GP form.
- [Chapter 7, “Detail Windows”](#), describes how to attach a new detail window to an existing Microsoft Dynamics GP form.
- [Chapter 8, “Notes”](#), describes how to attach a new detailed notes window to an existing Microsoft Dynamics GP form.
- [Chapter 9, “Inquiries”](#), describes how to attach a new inquiry window to an existing Microsoft Dynamics GP form.
- [Chapter 10, “Window Groups”](#), describes how to attach a group of windows to an existing Microsoft Dynamics GP form.
- [Chapter 11, “Forms”](#), describes how to create a new standalone data entry form
- [Chapter 12, “Detail Forms”](#), describes how to create a new standalone data entry form with detail line items

Chapter 6: Windows

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

This information is divided into the following sections:

[Adding a new Window](#)

[Using Windows](#)

[Modifying an existing Window](#)

[Setting Window options](#)

[Adding Window fields to SmartList](#)

[Creating Window templates](#)

[Setting Window template options](#)

[Using Window templates](#)

[Table Links](#)

[Moving Fields](#)

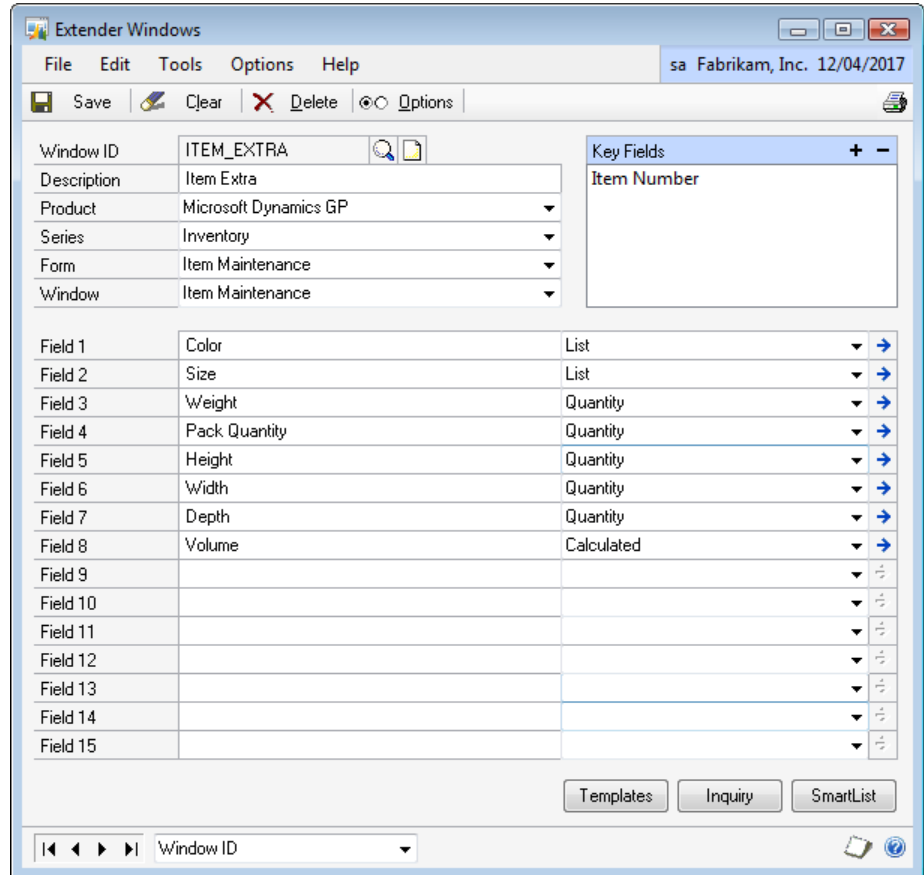
[Removing Windows](#)

Adding a new Window

Use the Extender Windows window to define new Windows.

To add a new Window:

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



2. Select Windows from the Extender Objects list.

3. Click New or enter CTRL+N.

4. Enter an ID and Description for the Window.

5. Select the Product, Series, Form and Window to link the Extender Window to.

6. Click the Add button above the Key Fields list to select a key field.

Repeat this step until all key fields have been selected.

7. Enter prompts and select field types for fields 1 to 15. For more information on each field type, see Chapter 6, "Field Types".

8. Click Save.



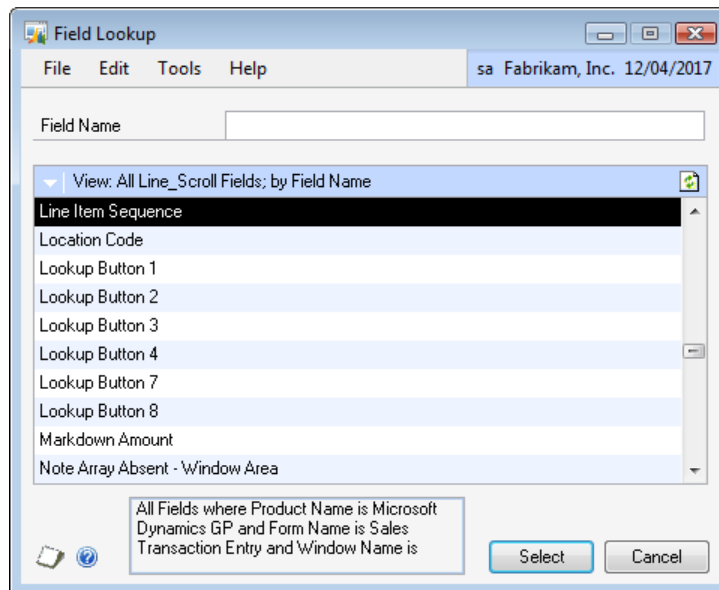
You can add more than one window to a single Microsoft Dynamics GP form.

Key Fields

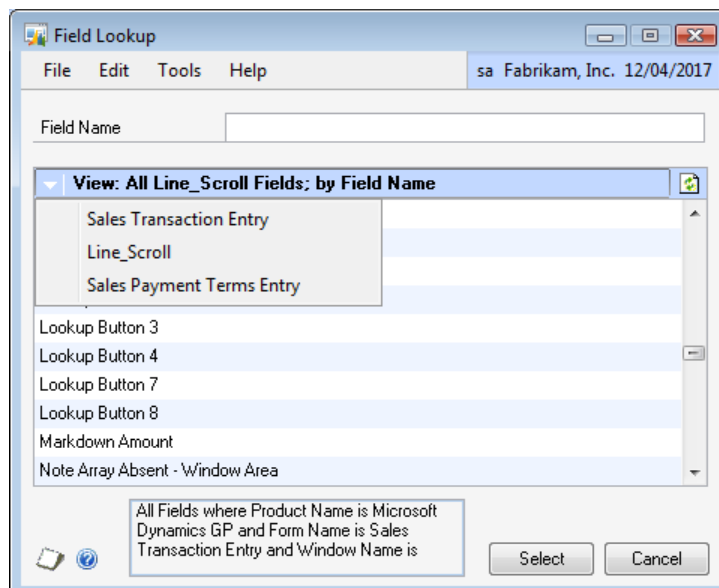
You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll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

To add a key field:

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



2. Select the window that contains the key field from the window button above the Window Fields list.



3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.
4. Click Select to add the selected field to the key fields for the Extender Window.

Using Windows

A window can be immediately accessed for data entry as soon as it has been saved.

To enter data into an Extender Window:

1. Open the Microsoft Dynamics GP form that the Extender window has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.
3. Select the Extender Window from the Additional menu or enter the Hot Key for the Window.

Field	Value
Item Number	100<X>LG
Color	Blue
Size	Medium
Weight	1.00
Pack Quantity	3.00
Height	3.50
Width	2.20
Depth	4.70
Volume	36.19

4. Enter values for each Extender Window field.
5. Click Save.

Modifying an existing Window

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

To modify an existing Window:

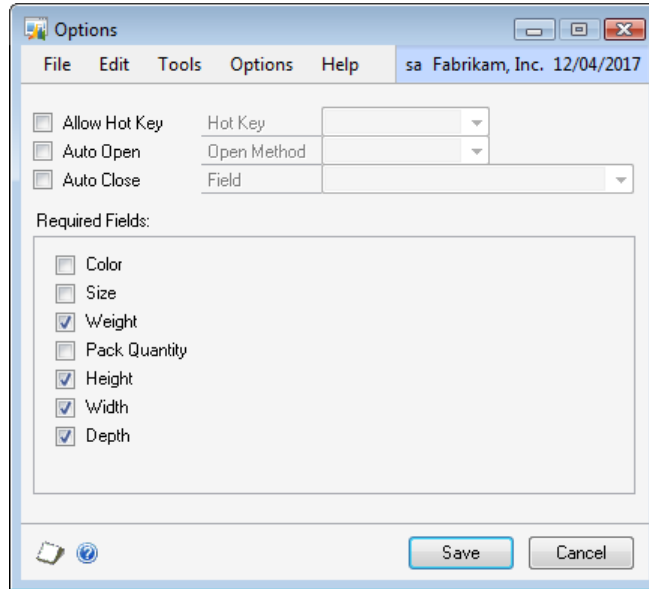
1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Windows from the Extender Objects list.
3. Click Open or enter CTRL+O
4. Enter new information for the Window
5. Click Save.

Setting Window options

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

To set required fields for a Window:

1. Click Options.

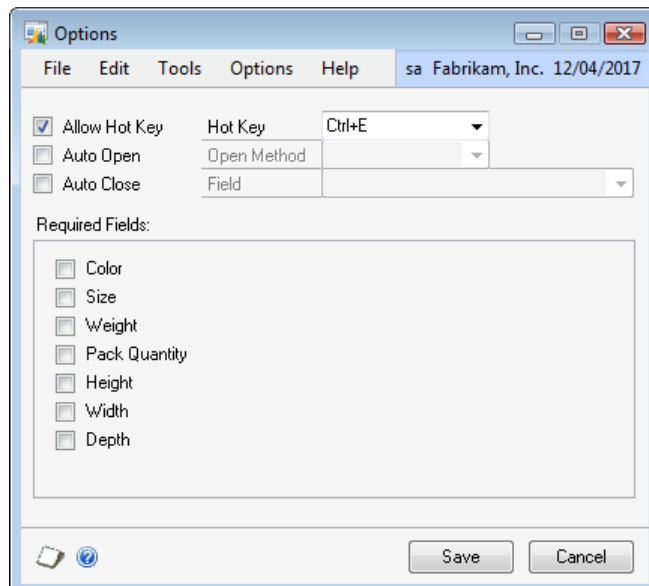


2. Mark the fields that you want to be required

3. Click Save.

To set a Hot Key for a Window:

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



3. Select the Hot Key from the Hot Key list.

4. Click Save.

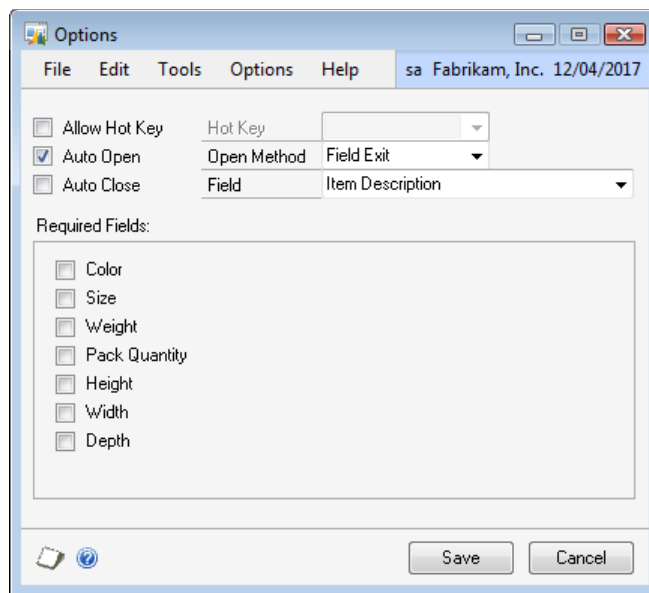
Auto Open and Close

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

To set Auto Open and Auto Close options:

1. Click Options.

2. Mark the Auto Open option.



3. Select the Open Method.

4. Select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.

5. Click Save.

Adding Window fields to SmartList

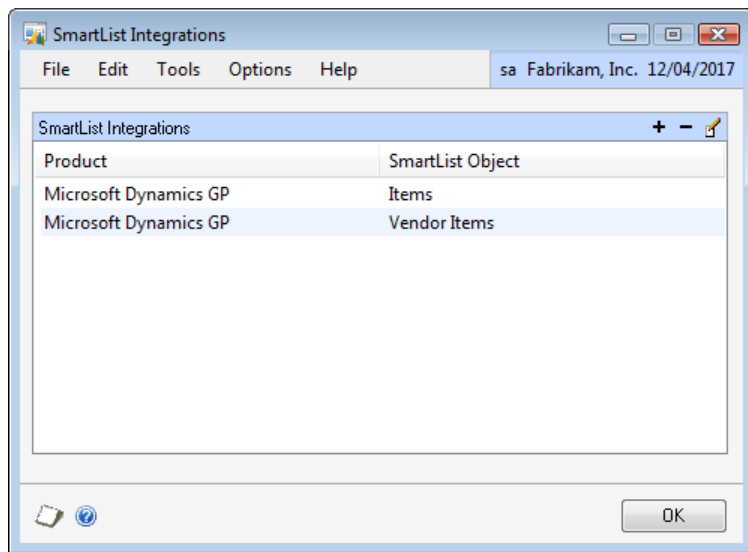
Use the SmartList Integrations window to add your Extender Window fields into an existing SmartList. As well as all SmartLists created with SmartList Builder, Extender Window fields can be added to the following Dynamics GP SmartLists:

- Accounts
- Customers
- Vendors
- Items
- Employees

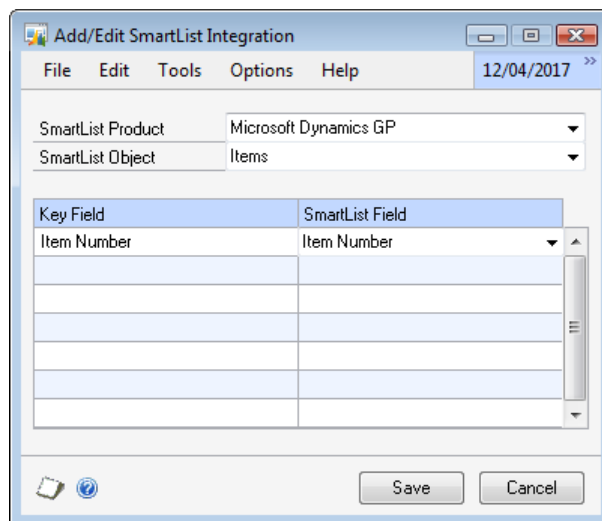
- Sales Transactions
- Purchase Orders
- Receivables Transactions
- Payables Transactions
- Payroll Transactions
- Customer Addresses
- Vendor Addresses
- Prospects
- Customer Items
- Vendor Items

To add Window fields to a SmartList:

1. Click the SmartList button.



2. Click the Add button above the SmartList Integrations list.



3. Select the SmartList Product and SmartList Object.

4. Match the Extender Window Key Fields to the SmartList fields.

5. Click Save.



You can add a window to more than one SmartList

To remove Window fields from a SmartList:

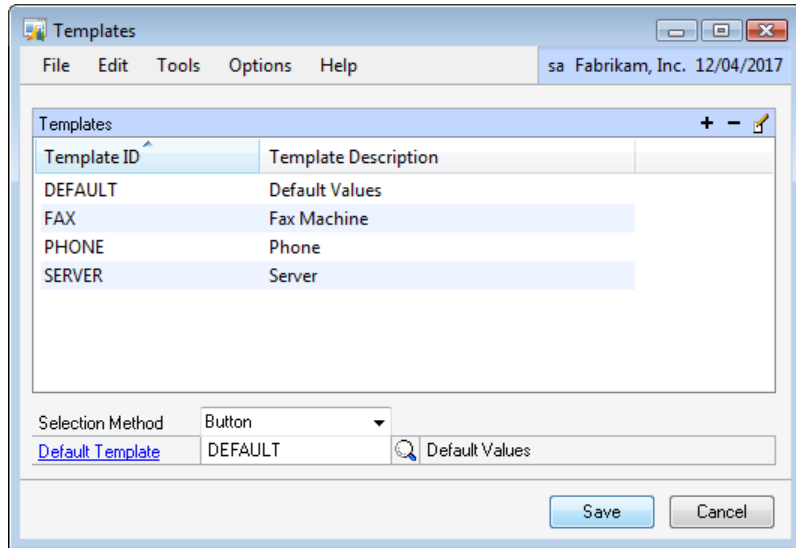
1. Click SmartList.
2. Select the SmartList from the SmartList Integrations list.
3. Click the Remove button above the SmartList Integrations list.

Creating Window templates

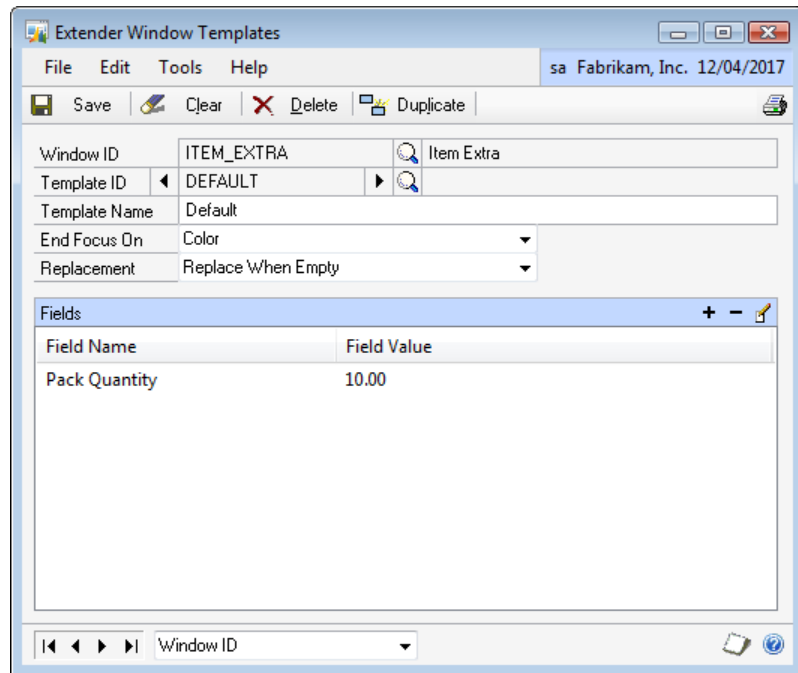
Use the Templates window to add new Window templates. A Window template is a set of default values for fields on the Window. They can be used to enter data more quickly by automatically assigning values.

To create a new Window template:

1. Click Templates.



2. Click the Add button above the Templates list.



3. Enter an ID and Description for the template.

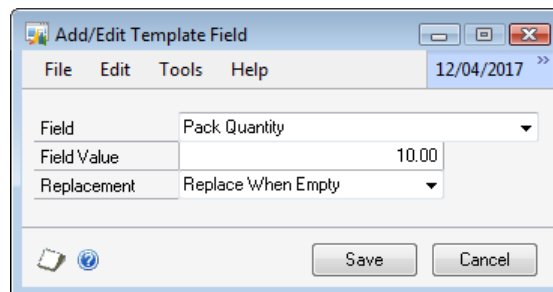
4. Select the field that the template will End Focus On.

5. Select the default replacement option.

6. Add fields to the template.

To add a field to the template:

1. Click the Add button above the Fields list.



2. Select the field that you want to default.

3. Select the Field Value.

4. Select the Replacement option.

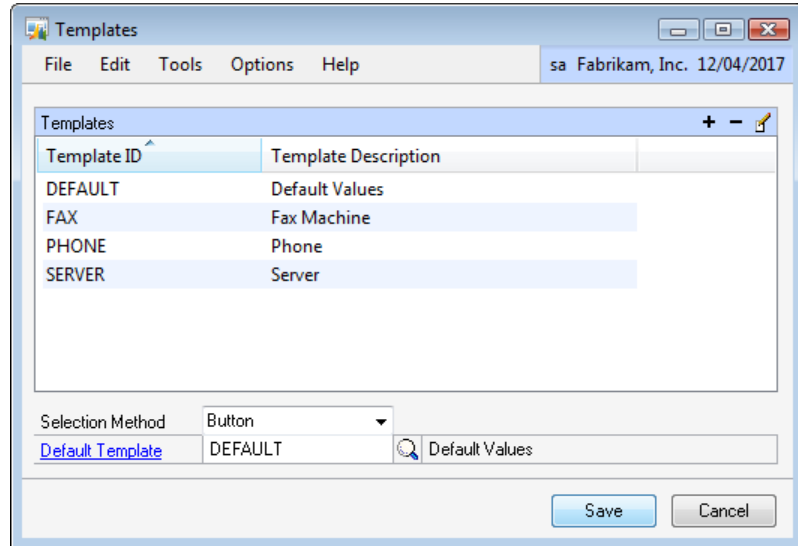
5. Click Save.

Setting Window template options

Use the Templates window to select the template selection method and the default template. The default template will be automatically applied when a window is opened that has not had any data entry performed on it.

To set Window template options:

1. Click Templates.



2. Select the Selection Method.
3. Enter the Default Template.
4. Click Save.

Using Window templates

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

If the Button selection method is chosen, there will be a template button available on your Window. Clicking on this button will display a list of templates.

If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.

If the Prompt selection method is chosen, a window will open prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the Extender Window.
2. Click Templates.
3. Select the Template from the list.

To select a template (Menu Selection Method):

1. Open the Extender Window.
2. Select the template from the Templates menu.

To select a template (Prompt Selection Method):

1. Open the Extender Window.
2. Select the template from the Template Selection window.



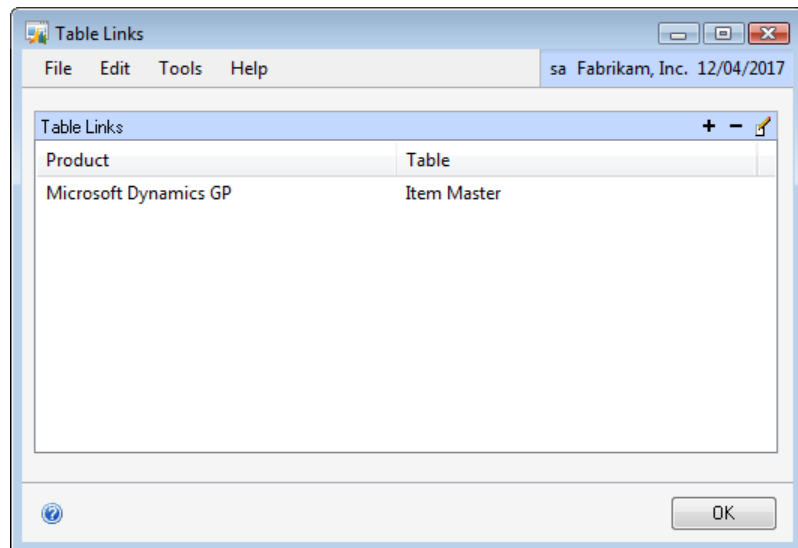
*You can reopen the Select Templates window by selecting Select Template from the Templates menu or entering **CTRL+T**.*

Table Links

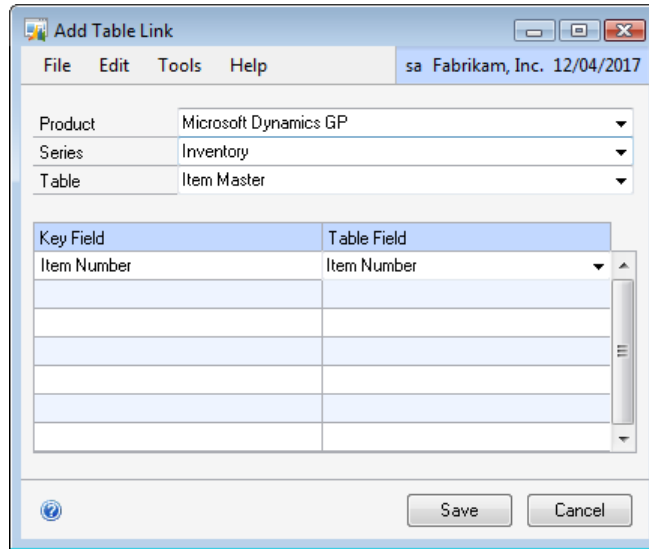
Linking an Extender Window to a table ensures that the Extender Window data is deleted when the corresponding table record is removed. A window can be linked to more than one table. When linked to more than one table, the Extender Window data will only be deleted when there is not a corresponding record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

To link a window to a table:

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



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



4. Select the Product, Series and Table that you want to link to.

5. Match the Key Fields on the window to fields in the Table.

6. Click Save.

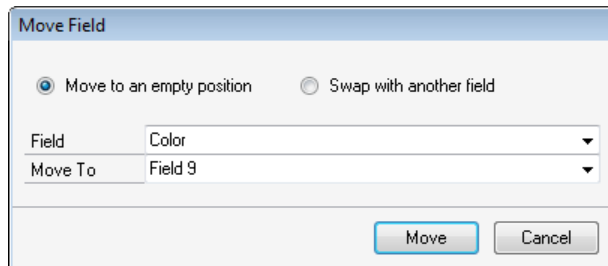
Moving Fields

Once data has been entered into an Extender Window, the positions of the fields can be moved using the Move Fields dialog.

To move a field to an empty position:

1. Open the Extender Windows window and select the Window that you want to move fields for.

2. Select Options >> Move Fields to open the Move Fields dialog.



3. Select the 'Move to an empty position' option.

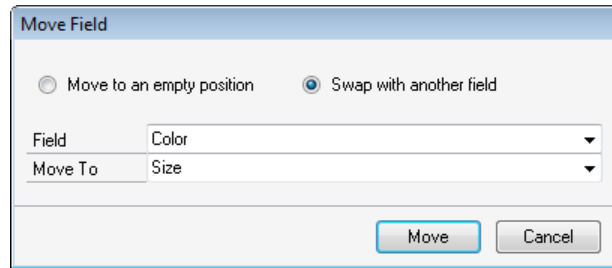
4. Select the field that you want to move.

5. Select the position that you want to move the field to.

6. Click Move.

To swap the positions of two fields:

1. Open the Extender Windows window and select the Window that you want to swap fields for.
2. Select Options >> Move Fields to open the Move Fields dialog.



3. Select the 'Swap with another field' option.
4. Select the fields that you want to swap.
5. Click Move.

Removing Windows

If you don't need a Window, you can remove it using the Extender Windows window. If you have already entered data for the window, the data will also be deleted.

To remove a Window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Windows from the Extender Objects list.
3. Select the Window that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 7: Detail Windows

This chapter will guide you through the creation of an Extender Detail Window. Extender Detail Windows are used to link new detail records to existing Microsoft Dynamics GP windows. You should use an Extender Window when you want to track multiple records against an existing Microsoft Dynamics GP. For example, you could use Extender Detail Windows to create a new window to track multiple contacts against a customer or vendor.

This information is divided into the following sections:

[Adding a new Detail Window](#)

[Using Detail Windows](#)

[Modifying an existing Detail Window](#)

[Setting Detail Window options](#)

[Creating Detail Window templates](#)

[Setting Detail Window template options](#)

[Using Detail Window templates](#)

[Table Links](#)

[Moving Fields](#)

[Removing Detail Windows](#)

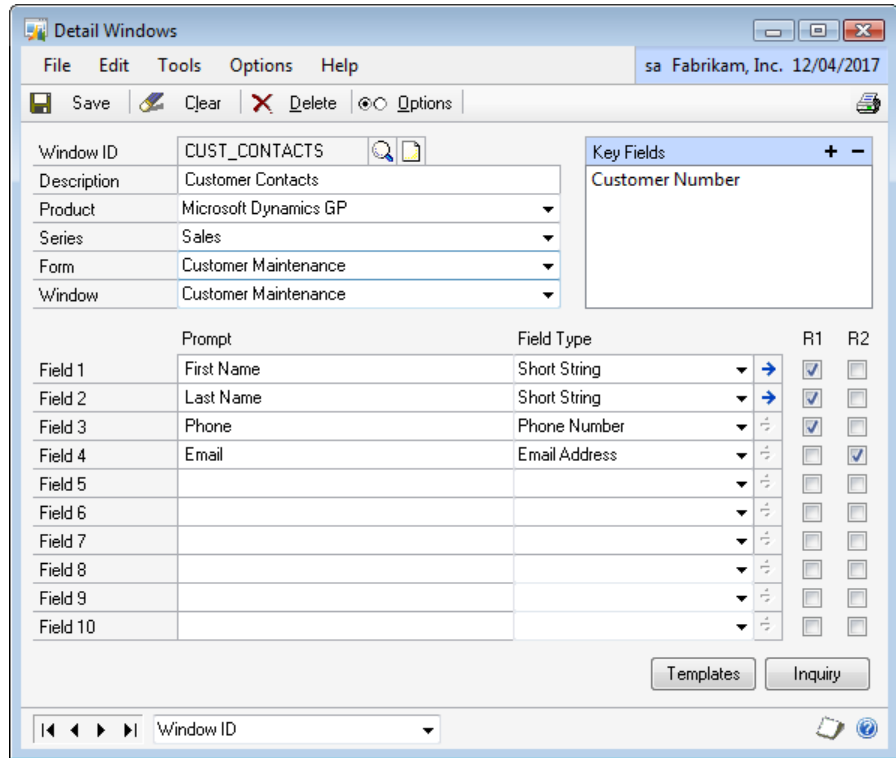
Adding a new Detail Window

Use the Extender Detail Windows window to define new Detail Windows.

To add a new Detail Window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Windows from the Extender Objects list.

3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Window.

5. Select the Product, Series, Form and Window to link the Extender Detail Window to.

6. Click the Add button above the Key Fields list to select a key field. Repeat this step until all key fields have been selected.

7. Enter prompts, select field types and select the first or second row for each field in the detail window.

For more information on each field type, see [Chapter 4, “Field Types”](#).

8. Click Save.



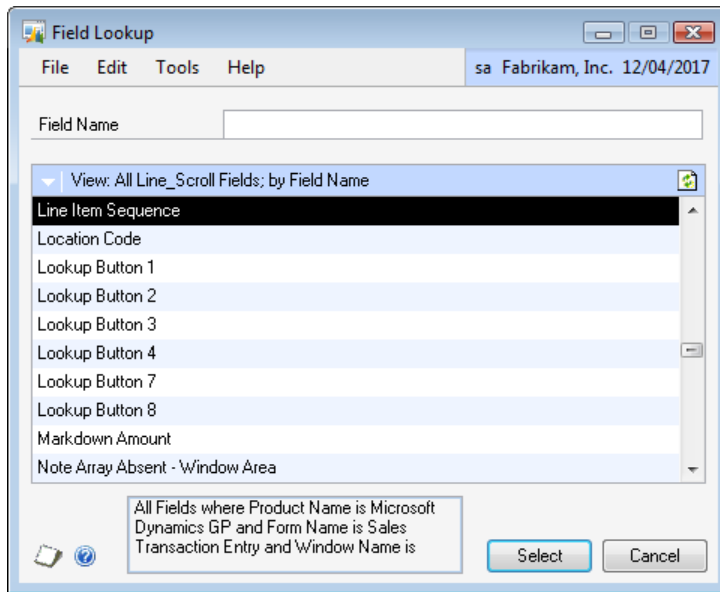
You can add more than one detail window to a single Microsoft Dynamics GP form. When you click Save, the new detail window will be immediately available as an Additional menu item from the selected Microsoft Dynamics GP window.

Key Fields

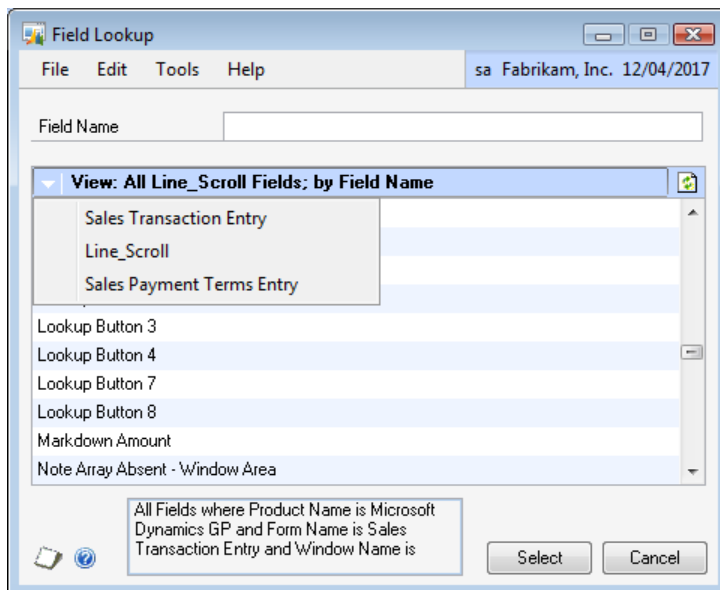
You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll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

To add a key field:

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



2. Select the window that contains the key field from the window button above the Window Fields list.



3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.
4. Click Select to add the selected field to the key fields for the Extender Detail Window.

Using Detail Windows

As soon as an Extender Detail Window is saved, the new window fields will be available via the Additional menu on the Form that the detail window has been linked to. The user interface of this window is the same as any other Microsoft Dynamics GP window.

To enter data into an Extender Detail Window:

1. Open the Microsoft Dynamics GP form that the Extender Detail Window has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.



If none of the key fields have been entered, you will receive the error message “Not all required fields have been entered”

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

First Name	Last Name	Phone
Aaron	Fitz	(555) 555-5555 Ext. 1234
Bob	Fitz	(555) 555-5555 Ext. 1235
		(000) 000-0000 Ext. 0000

4. Enter lines of values for each Extender Detail Window field.
5. Click Save.

Modifying an existing Detail Window

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

To modify an existing Detail Window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Windows from the Extender Objects list.
3. Click Open or enter CTRL+O.

4. Enter new information for the Detail Window.

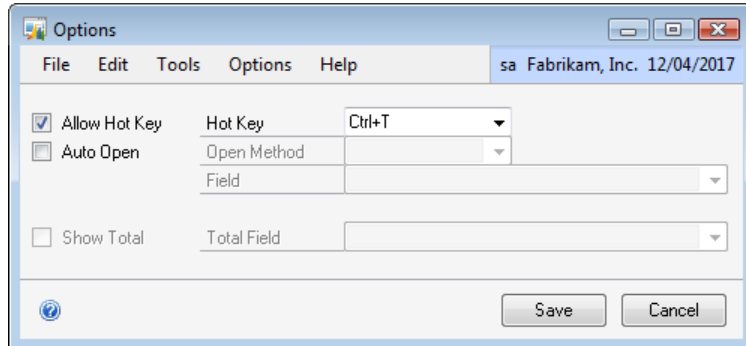
5. Click Save.

Setting Detail Window options

Use the Extender Detail Windows Options window to assign a hot key, set auto open options and select a field to be totaled for the Extender Detail Window.

To assign a hot key:

1. Click Options.



2. Mark the Allow Hot Key checkbox.

3. Select the Hot Key.

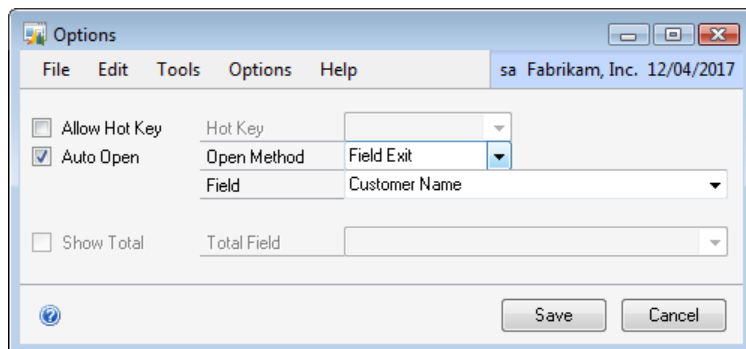
4. Click Save.

Auto Open and Close

Detail Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. If the main window that you have selected to link to is a scrolling window, you can also choose to automatically open when a line is added or modified.

To set Auto Open options:

1. Click Options.



2. Mark the Auto Open option.

3. Select the Open Method. You cannot select Line Change as the Open Method if the

window selected is not a scrolling window.

4. If you have not selected Line Change as the Open Method, select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.

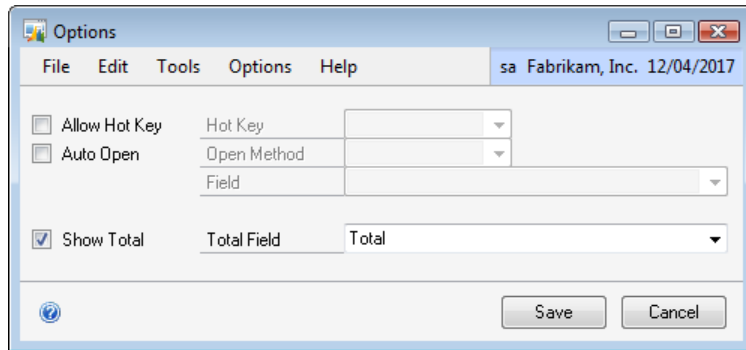


You should not use any of the key fields as the Auto Open field.

5. Click Save.

To select a field to be totaled:

1. Click Options.



2. Mark the Show Total checkbox. This checkbox will only be enabled if there are numeric (Number, Currency, Percentage and Quantity) fields on the window.

3. Select the field that you want to be totaled.

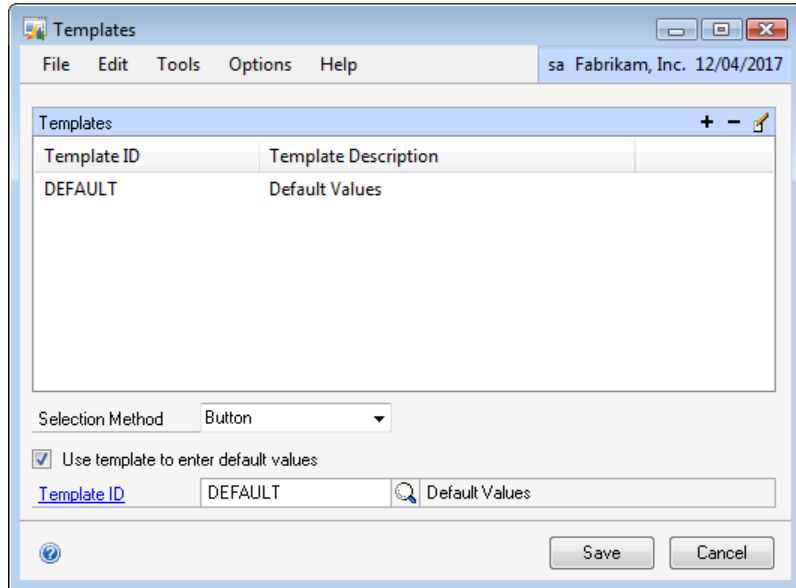
4. Click Save.

Creating Detail Window templates

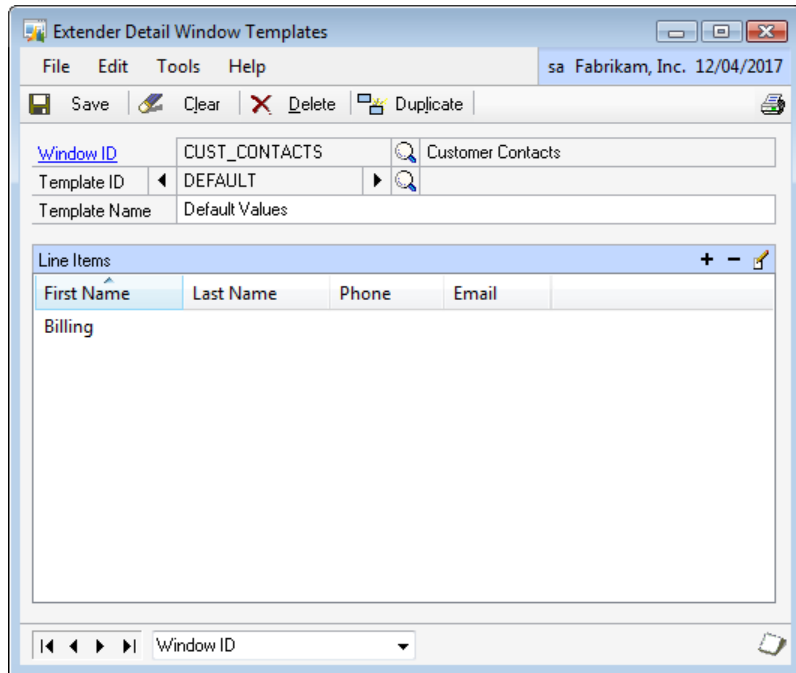
Use the Templates window to add new Detail Window templates. A Detail Window template is a set of default values for lines on the Detail Window. They can be used to enter data more quickly by automatically assigning values.

To create a new Detail Window template:

1. Click Templates.



2. Click the Add button above the Templates list.



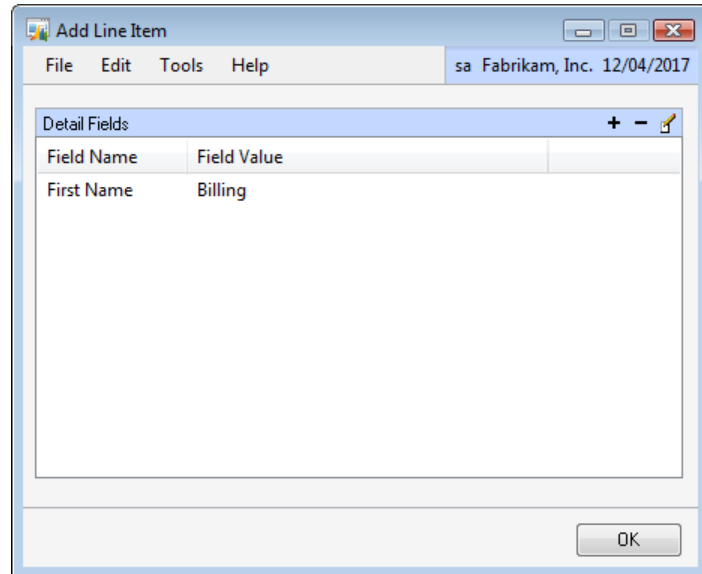
3. Enter an ID and Description for the template.
4. Add lines to the template.

5. Add fields for each line of the template.

6. Click Save.

To add a line to the template:

1. Click the Add button above the Line Items list.



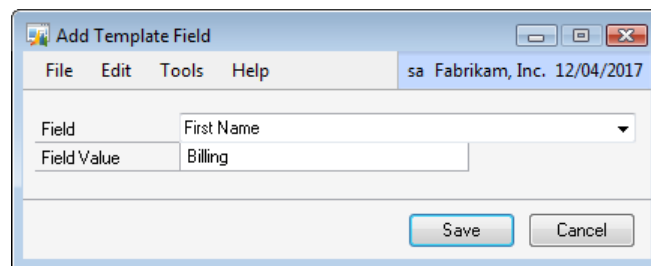
2. Add fields for the line item.

3. Click OK.

To add a field to a template line:

1. Select the line that you want to add a field to from the List Items list. Click the Edit button.

2. Click the Add button above the Detail Fields list.



3. Select the field that you want to default.

4. Select the Field Value.

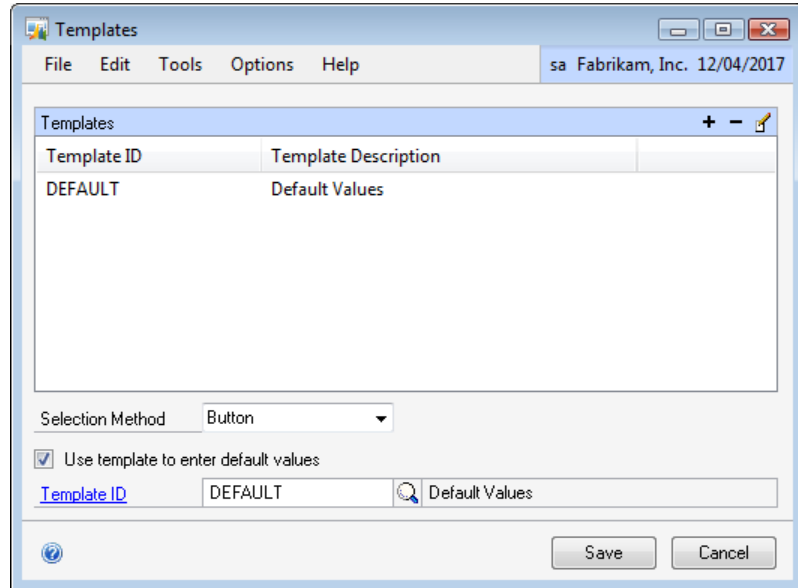
5. Click Save.

Setting Detail Window template options

Use the Templates window to select the template selection method and the default template. The default template will be automatically applied when a detail window is opened and has not had any data entry performed on it.

To set Detail Window template options:

1. Click Templates.



2. Select the Selection Method.
3. Mark the 'Use template to enter default values' checkbox. Enter the Default Template.
4. Click Save.

Using Detail Window templates

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

If the Button selection method is chosen, there will be a template button available on your Detail Window. Clicking on this button will display a list of templates.

If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.

If the Prompt selection method is chosen, a window will open prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the Extender Detail Window
2. Click Templates.
3. Select the Template from the list.

To select a template (Menu Selection Method):

1. Open the Extender Detail Window.
2. Select the template from the Templates menu.

To select a template (Prompt Selection Method):

1. Open the Extender Detail Window.
2. Select the template from the Template Selection window.



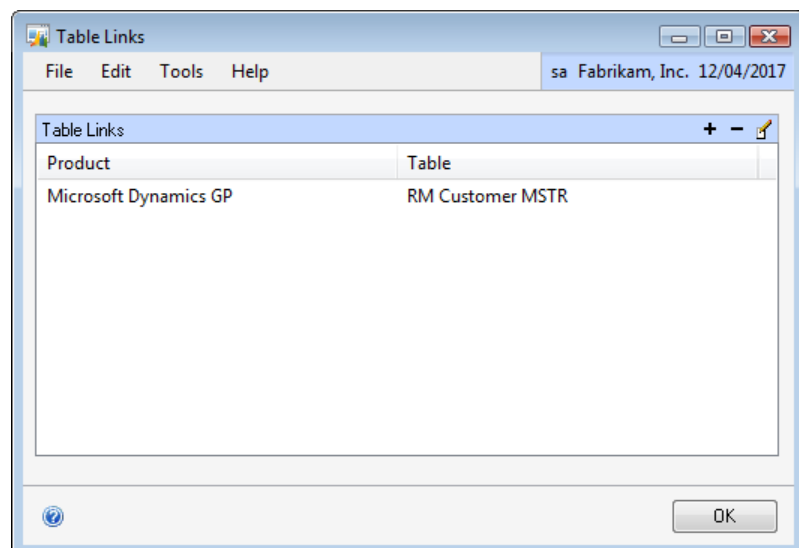
You can reopen the Select Templates window by selecting Select Template from the Templates menu or entering CTRL+T.

Table Links

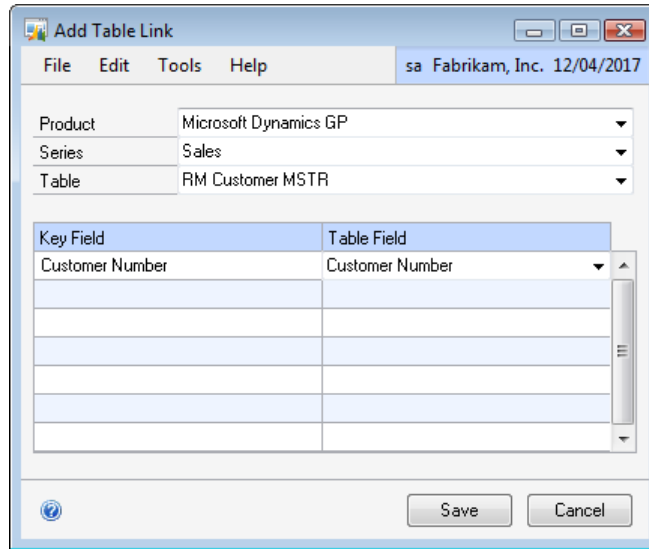
Linking an Extender Detail Window to a table ensures that the Extender Detail Window data is deleted when the corresponding table record is removed. A detail window can be linked to more than one table. When linked to more than one table, the Extender Detail Window data will only be deleted when there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

To link a window to a table:

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



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



4. Select the Product, Series and Table that you want to link to.

5. Match the Key Fields on the window to fields in the Table.

6. Click Save.

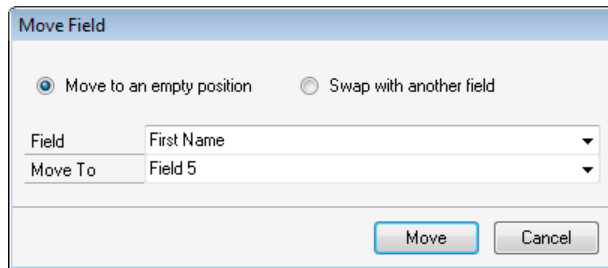
Moving Fields

Once data has been entered into an Extender Window, the positions of the fields can be moved using the Move Fields dialog.

To move a field to an empty position:

1. Open the Extender Windows window and select the Window that you want to move fields for.

2. Select Options >> Move Fields to open the Move Fields dialog.



3. Select the 'Move to an empty position' option.

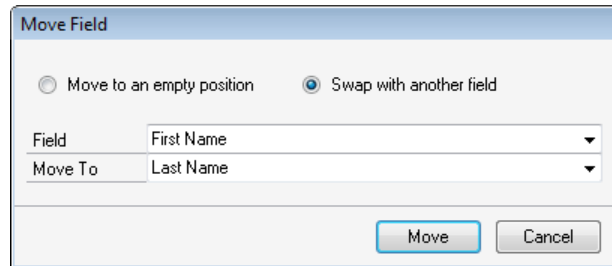
4. Select the field that you want to move.

5. Select the position that you want to move the field to.

6. Click Move.

To swap the positions of two fields:

1. Open the Extender Windows window and select the Window that you want to swap fields for.
2. Select Options >> Move Fields to open the Move Fields dialog.



3. Select the 'Swap with another field' option.
4. Select the fields that you want to swap.
5. Click Move.

Removing Detail Windows

If you don't need a Detail Window, you can remove it using the Extender Detail Windows window. If you have already entered data for the Detail Window, the data will also be deleted.

To remove a Detail Window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Windows from the Extender Objects list.
3. Select the Detail Window that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 8: Notes

This chapter will guide you through the creation of an Extender Note. Unlike the standard Microsoft Dynamics GP note window, which only allows you to enter a single note, an Extender Notes window allows you attach multiple notes to a Microsoft Dynamics GP window. For example, you could use an Extender Note to record correspondence details against a customer or vendor. Each note entered in an Extender Notes window automatically records the date and time the note was entered as well as the user that entered the note.

This information is divided into the following sections:

[Adding a new Notes windows](#)

[Note Types](#)

[Using Notes windows](#)

[Modifying an existing Notes window](#)

[Table Links](#)

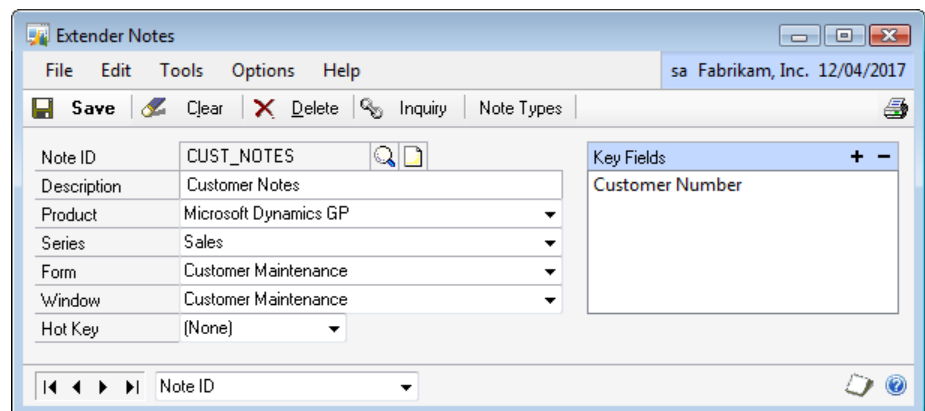
[Removing Notes windows](#)

Adding a new Notes window

Use the Extender Notes window to define new Notes.

To add a new Notes window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Notes from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Notes window.
5. Select the Product, Series, Form and Window to link the Extender Notes window to.
6. Click the Add button above the Key Fields list to select a key field.

Repeat this step until all key fields have been selected.

7. Select a Hot Key from the Hot Key list.

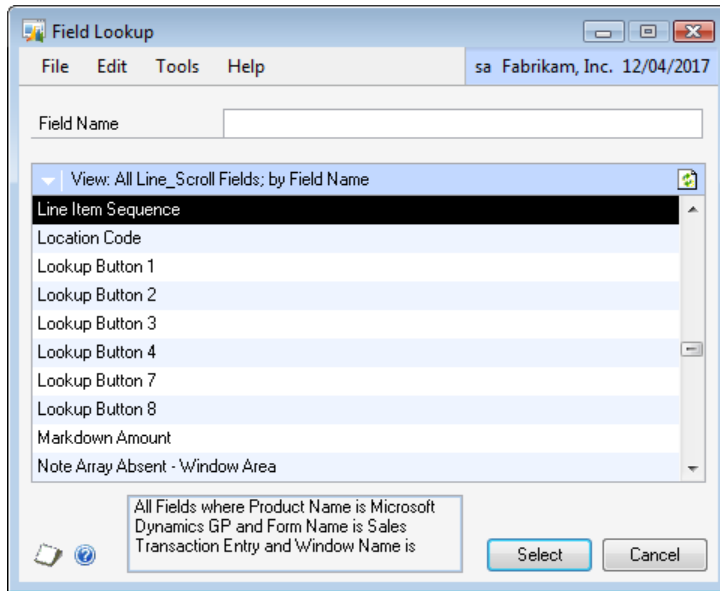
8. Click Save.

Key Fields

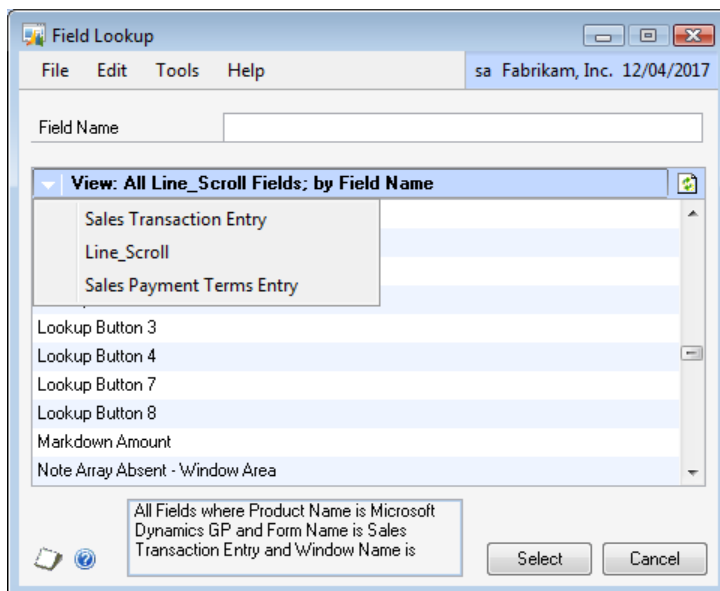
You can select key fields from multiple windows on the same form. This is particularly useful when linking extra fields to a scrolling window. For example, when linking additional fields to the line items of the Sales Transaction Entry window, you will need to select the Line Item Sequence from the Line_Scroll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

To add a key field:

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



2. Select the window that contains the key field from the window button above the Window Fields list.



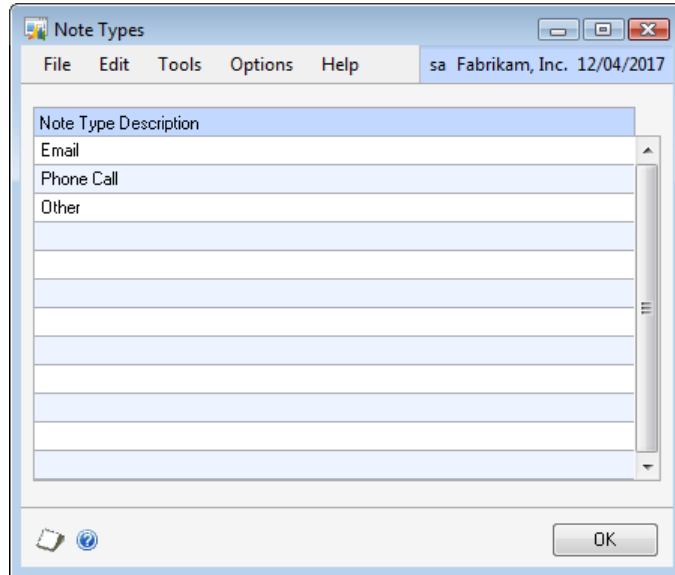
3. Select the key field from the Window Fields list. You can search for a field by entering the first few characters of the field name into the Field Name field.
4. Click Select to add the selected field to the key fields for the Extender Note.

Note Types

You can define Note Types to classify the detail notes into groups for analysis.

To set note types:

1. Click the Note Types button to open the Note Types window.



2. Enter the descriptions of the note types into the scrolling window.
3. Click OK.

Using Notes windows

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

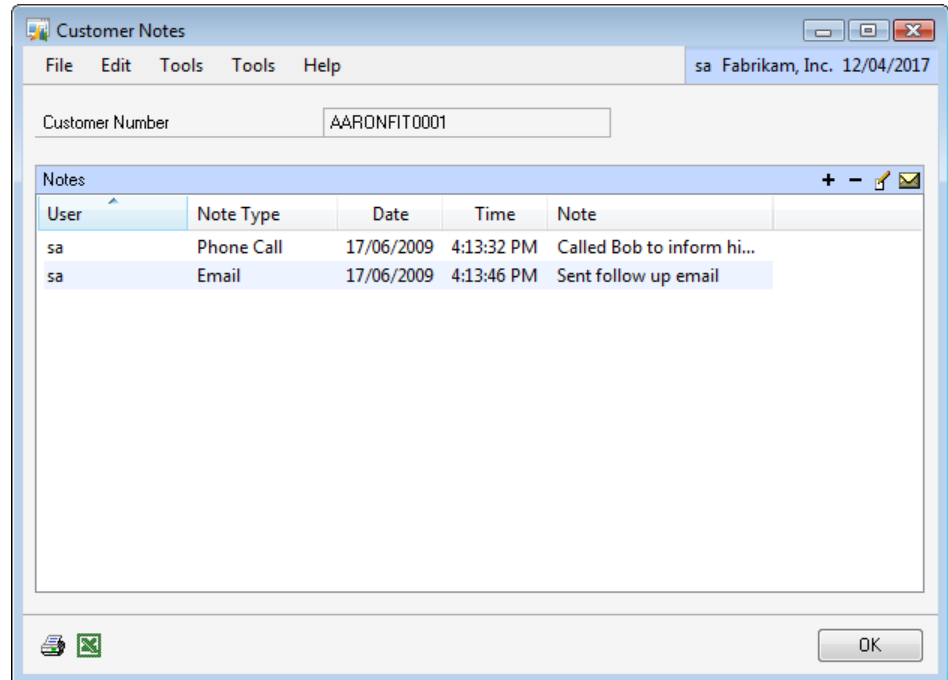
To open a Notes window:

1. Open the Microsoft Dynamics GP form that the Extender Note has been linked to.
2. Enter the required key fields for the Microsoft Dynamics GP form.



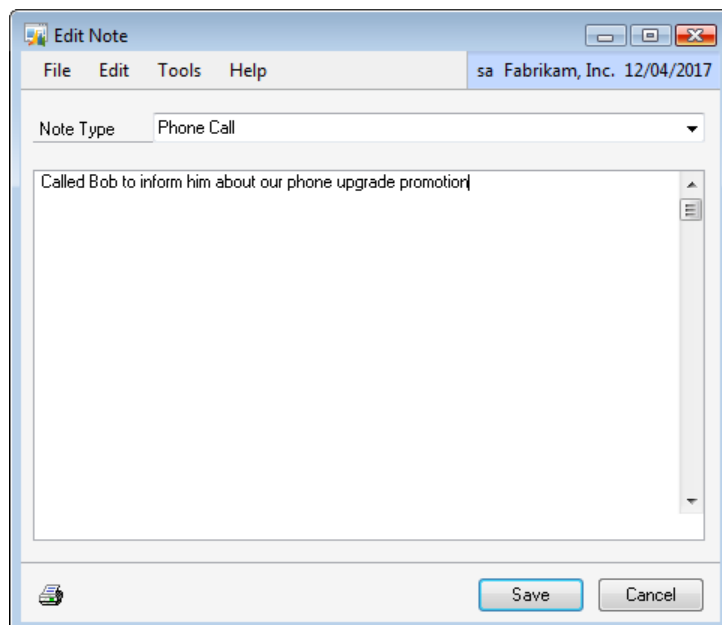
If none of the key fields have been entered, you will receive the error message “Not all required fields have been entered”

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



To add a note:

1. Open the Notes window.
2. Click the Add button above the Notes list.



3. If note types have been set up for the note, select the note type.
4. Enter the note text.
5. Click Save.

To edit an existing note:

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

To remove a note:

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

To print a Notes list:

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

To export a Notes list to Microsoft® Office Excel®:

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

Modifying an existing Notes window

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

To modify an existing Notes window:

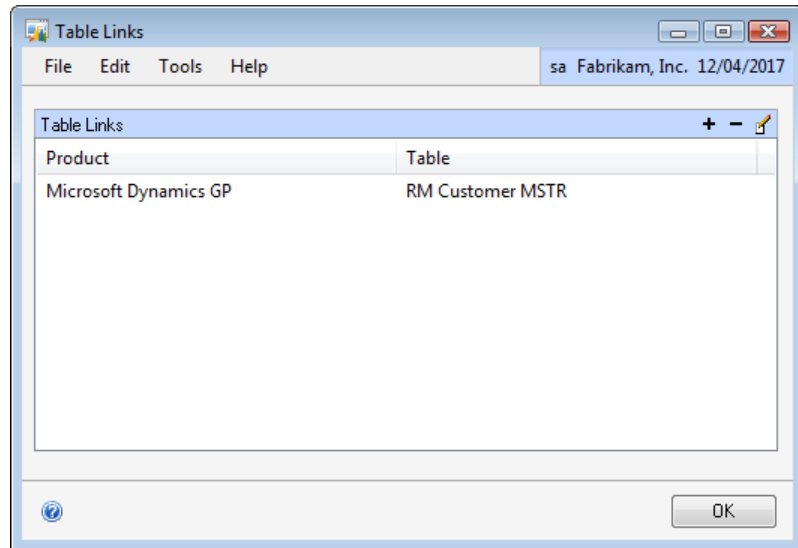
1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Notes from the Extender Objects list.
3. Click Open or enter CTRL+O.
4. Enter new information for the Notes window.
5. Click Save.

Table Links

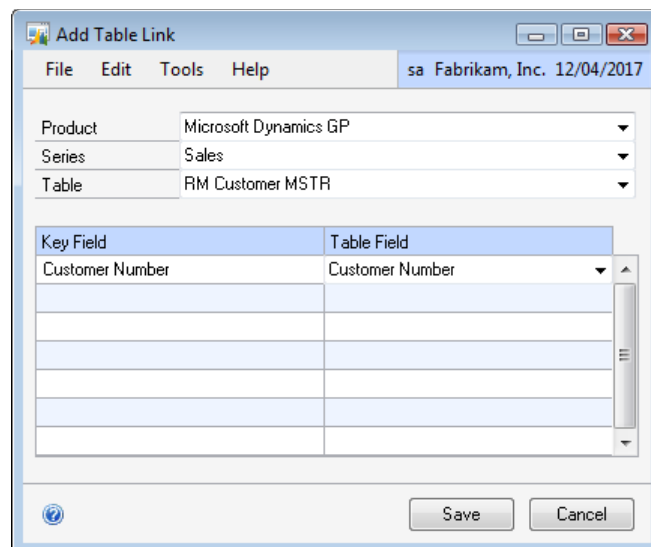
Linking an Extender Note to a table ensures that the Extender Note text is deleted when the corresponding table record is removed. A note can be linked to more than one table. When linked to more than one table, the Extender Note text will only be deleted when there is not a corresponding record in any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

To link a window to a table:

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



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



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

Removing Notes windows

If you don't need a Note, you can remove it using the Extender Notes window. If you have already entered notes for the window, the notes will also be deleted.

To remove a Notes window:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Notes from the Extender Objects list.
3. Select the Note that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O
5. Click Delete.

Chapter 9: Inquiries

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

This information is divided into the following sections:

[Adding a new Inquiry](#)

[Modifying an existing Inquiry](#)

[Setting Inquiry options](#)

[Alternate Keys](#)

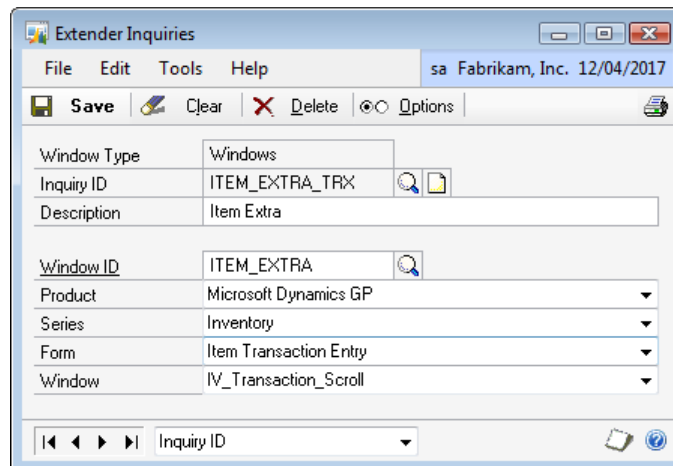
[Removing Inquiries](#)

Adding a new Inquiry

Use the Extender Inquiries window to define new Inquiries.

To add a new Inquiry:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Inquiries from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Select the Window Type for the Inquiry. This can be Window, Note or Detail Window.
5. Enter an ID and Description for the Inquiry.
6. Enter the Window ID for the Extender Window, Note or Detail Window to base the Inquiry upon
7. Select the Product, Series, Form and Window to link the Extender Inquiry to.

Modifying an existing Inquiry

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

To modify an existing Inquiry:

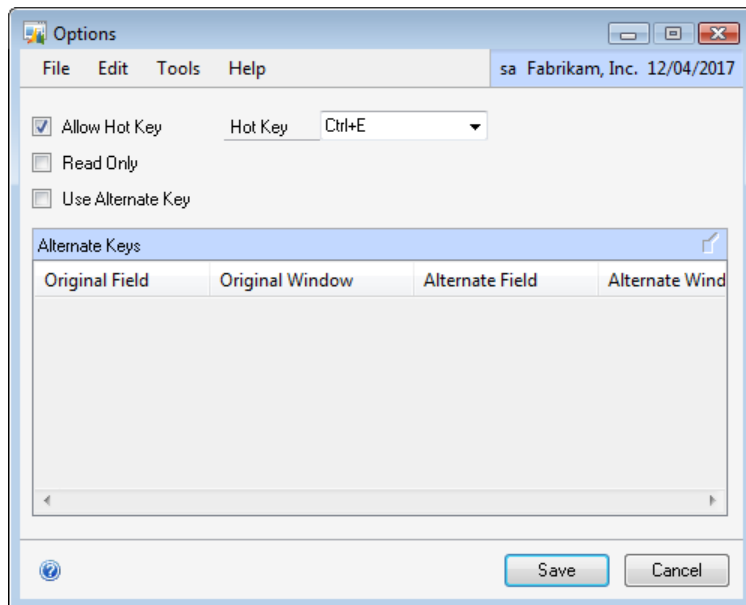
1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Inquiries from the Extender Objects list.
3. Click Open or enter CTRL+O.
4. Enter new information for the Inquiry.
5. Click Save.

Setting Inquiry options

Use the Options window to select the hot key for the Inquiry and set the Inquiry as Read Only.

To set a Hot Key for an Inquiry:

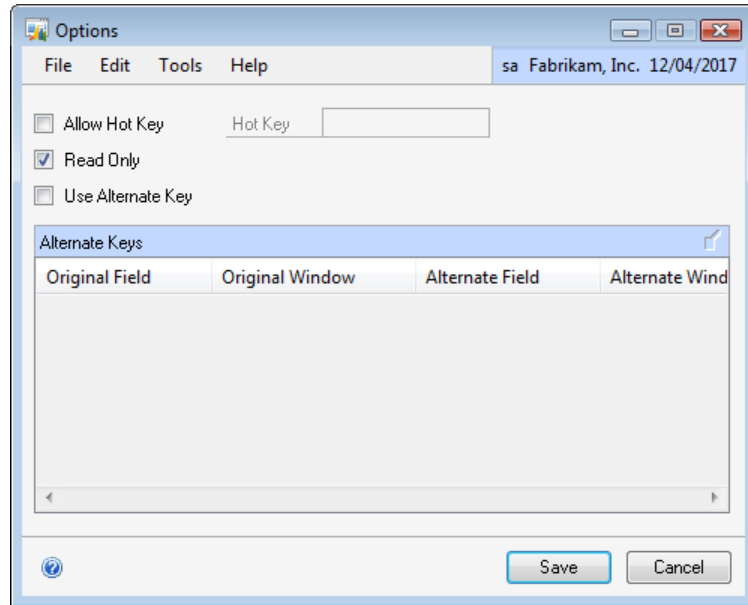
1. Click Options.



2. Mark the Allow Hot Key option.
3. Select the Hot Key from the Hot Key list.
4. Click Save.

To set the Inquiry as read only:

1. Click Options.



2. Mark the Read Only option.

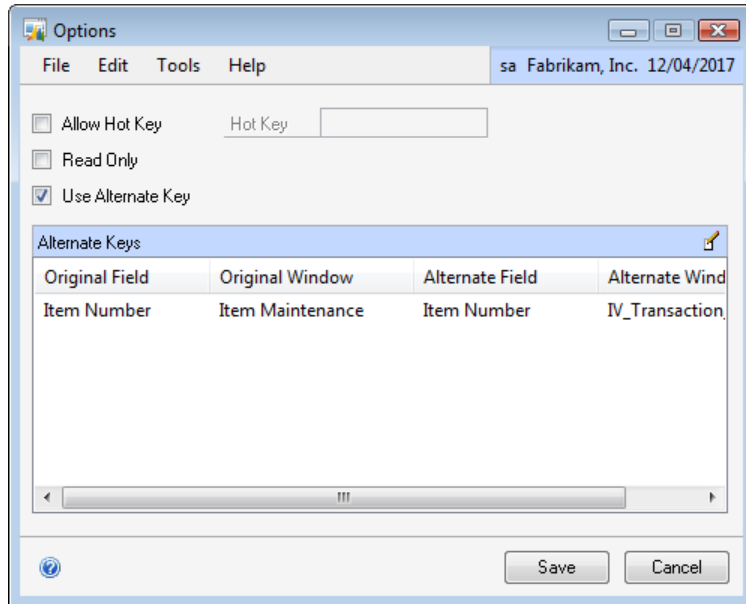
3. Click Save.

Alternate Keys

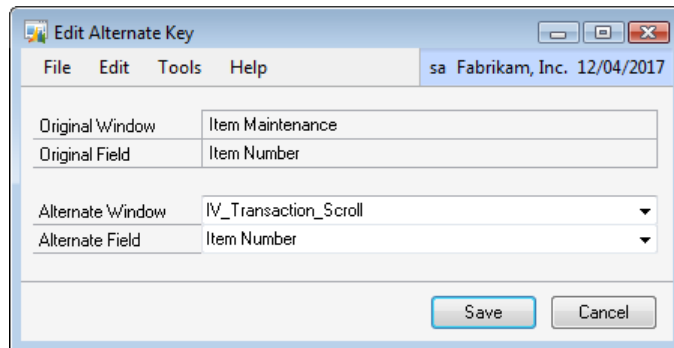
By default, the Extender Inquiry uses the same key fields as the Extender Window that is based on. In some cases, these fields will not exist on the Microsoft Dynamics GP window that you have selected. When this occurs, you will need to assign alternate key fields for the Inquiry to be used instead of the default key fields.

To set an alternate key for the Inquiry:

1. Click Options.



2. Mark the Use Alternate Key option.
3. Select the first key in the alternate keys list.
4. Click the edit button above the alternate keys list to open the Edit Alternate Key window.



5. Select the Alternate Window and Alternate Field.
6. Click Save.
7. Repeat steps 3-6 for all of the keys in the alternate keys list.
8. Click Save.

Removing Inquiries

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

To remove an Inquiry:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Inquiries from the Extender Objects list.
3. Select the Inquiry that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 10: Window Groups

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

This information is divided into the following sections:

[Adding a new Window Group](#)

[Adding windows to a Window Group](#)

[Setting Window Group options](#)

[Modifying an existing Window Group](#)

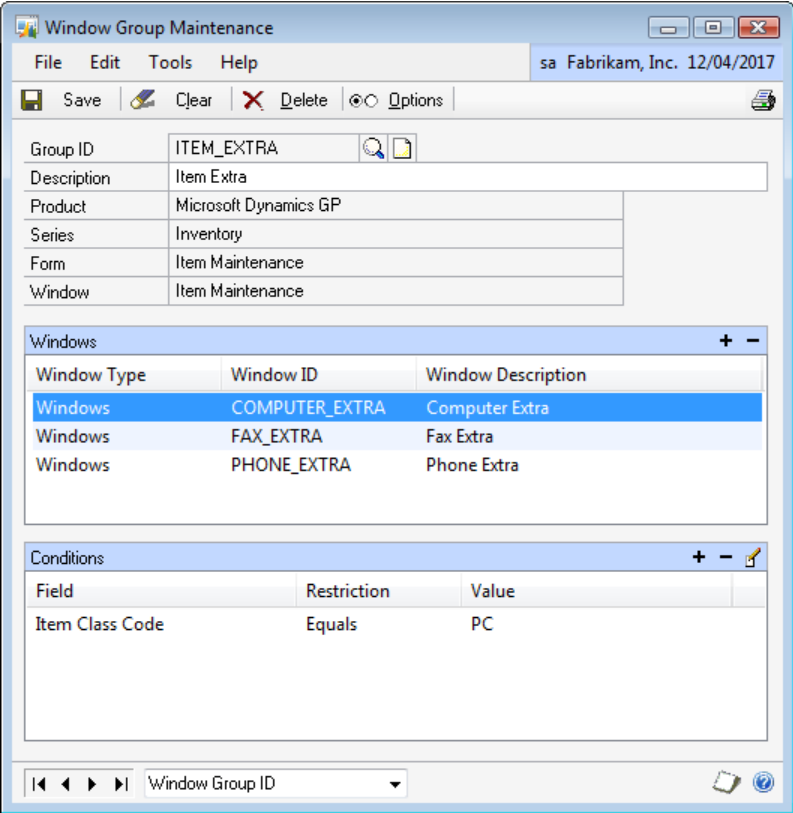
[Removing a Window Group](#)

Adding a new Window Group

You can use the Window Group Maintenance window to create new Window Groups.

To add a Window Group:

- 1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
- 2. Select Windows from the Extender Objects list.
- 3. Click New or enter CTRL+N.



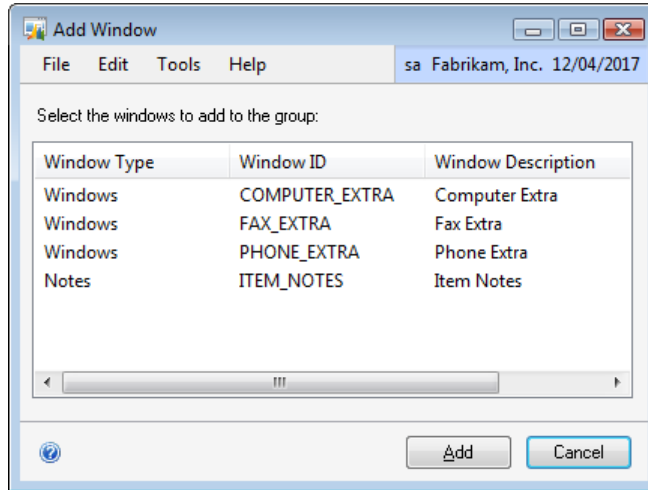
- 4. Enter an ID and Description for the Window.
- 5. Select the Product, Series, Form and Window for the Window Group.
- 6. Add Windows and Conditions.
- 7. Click Save.

Adding windows to a Window Group

A window group is made up of one or more windows. The windows that can be added to a Window Group are Windows, Detail Windows, Notes and Inquiries. Conditions can be added to each window to specify when each window will be opened.

To add a window to a window group:

1. Click the Add button above the Windows list.



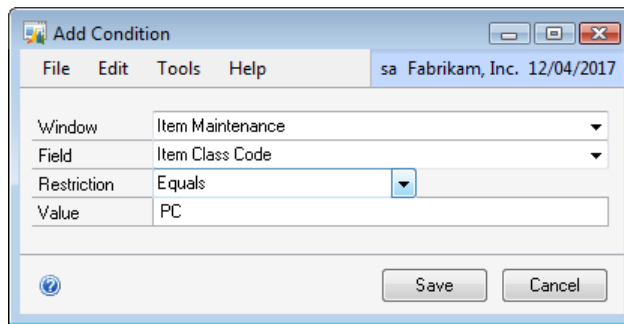
2. Select the windows that you want to add to the group. You can select more than one window at a time.
3. Click Add.

To remove a window from a group:

1. Select the window that you want to remove from the Windows list.
2. Click the Remove button above the Windows list.

To add conditions for a window:

1. Select the window that you want to add a condition to from the Windows list.
2. Click the Add button above the Conditions list.



3. Select the Window and Field to base the condition on.

4. Select the Restriction type.
5. Enter the value for the restriction.
6. Click Save.

To modify an existing condition:

1. Select the window that contains the condition that you want to modify.
2. Select the condition that you want to modify from the Conditions list.
3. Click the Edit button above the Conditions list.
4. Enter the new information for the condition.
5. Click Save.

To remove a window from a group:

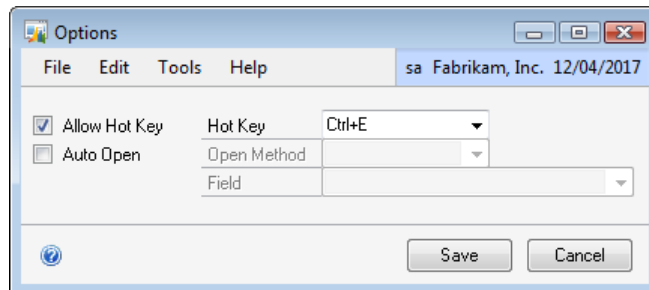
1. Select the window that contains the condition that you want to modify.
2. Select the condition that you want to remove from the Conditions list.
3. Click the Remove button above the Conditions list.

Setting Window Group options

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

To set a Hot Key for a Window:

1. Click Options.



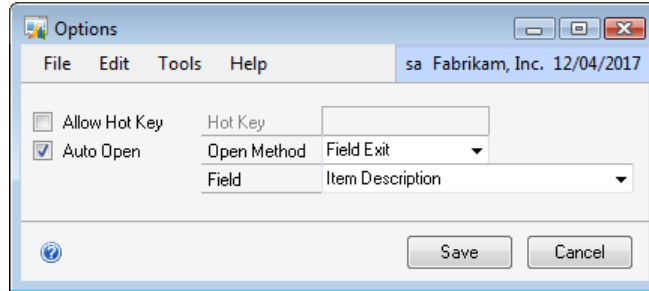
2. Mark the Allow Hot Key option.
3. Select the Hot Key from the Hot Key list.
4. Click Save.

Auto Open and Close

Windows can be set up to automatically open when entering or exiting a field on the Microsoft Dynamics GP window. If the main window that you have selected to link to is a scrolling window, you can also choose to automatically open the Extender window when a line is added or modified.

To set Auto Open options:

1. Click Options.



2. Mark the Auto Open option.
3. Select the Open Method. You cannot select Line Change as the Open Method if the window selected is not a scrolling window.
4. If you have not selected Line Change as the Open Method, select the Field that will trigger the Auto Open. Fields in this drop down list are sorted by their position on the Microsoft Dynamics GP window.
5. Click Save.

Modifying an existing Window Group

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

To modify an existing Window Group:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Window Groups from the Extender Objects list.
3. Click Open or enter CTRL+O.
4. Enter new information for the Window Group.
5. Click Save.

Removing Window Groups

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

To remove a Window Group:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Window Groups from the Extender Objects list.
3. Select the Window Group that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 11: Forms

This chapter will guide you through the creation of a new Extender Form. An Extender Form creates a standalone data entry form. Unlike Extender Windows, Extender Forms do not have to be attached to an existing Microsoft Dynamics GP window. Extender Forms can be used to track any type of master file or transaction information that is not already stored in Microsoft Dynamics GP. For example, you could use an Extender Form to store worksheet or job details.

This information is divided into the following sections:

[Adding a new Form](#)

[Using Forms](#)

[Modifying an existing Form](#)

[Adding extra windows to a Form](#)

[Setting Form options](#)

[Auto Notes](#)

[Setting Form options](#)

[Creating Form templates](#)

[Setting Form template options](#)

[Using Form templates](#)

[Removing Forms](#)

Adding a new Form

Use the Extender Forms window to define new Forms. Each form that you create will have an ID and a Description field. The ID field is the unique identifier for the form record. The description field is a description of the record.

To add a new Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender)
2. Select Forms from the Extender Objects list.

3. Click New or enter CTRL+N.

The screenshot shows the 'Extender Forms' application window. The title bar reads 'Extender Forms' and the user is logged in as 'sa Fabrikam, Inc. 12/04/2017'. The menu bar includes 'File', 'Edit', 'Tools', 'Options', and 'Help'. The toolbar contains 'Save', 'Clear', 'Delete', and 'Options'.

The form configuration is as follows:

Form ID	JOB_SHEET	
Form Name	Job Sheet	
ID Field Prompt	Job Number	
Description Prompt	Description	

	Column 1		Column 2	
Field 1	Job Type	List		
Field 2	Status	List		
Field 3				
Field 4	Assigned To	Lookup		
Field 5	Customer	Lookup		
Field 6				
Field 7	Start Date	Date	End Date	Date
Field 8	Due Date	Date		
Field 9				
Field 10				
Field 11				
Field 12				

Buttons at the bottom right: Multicurrency, Templates, Extra Windows.

Bottom status bar: Form ID

4. Enter an ID and Name for the Form.

5. Enter an ID Field Prompt and Description Prompt.

6. Enter prompts and select field types for fields 1 to 12 in Column 1.

7. Enter prompts and select field types for fields 1 to 12 in Column 2.

For more information on each field type, see [Chapter 6, "Field Types"](#).

8. Click Save.

Using Forms

After creating a Form, you can test it using the main Extender window. The user interface for a Form is the same as a standard Microsoft Dynamics GP window, using the same fields and controls.

To open a Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Forms from the Extender Objects list.
3. Select the Form that you want to open from the Extender Resources list
4. Click the GoTo button and select Use Form or enter CTRL+U

The screenshot shows a 'Job Sheet' form window. The title bar reads 'Job Sheet' and the user information is 'sa Fabrikam, Inc. 12/04/2017'. The menu bar includes File, Edit, Tools, View, Windows, Templates, and Help. Below the menu is a toolbar with Save, Clear, Delete, and Duplicate buttons. The form fields are as follows:

Job Number	0000001	
Description	Call Aaron Fitz	
Job Type	Phone Call	
Status	Entered	
Assigned To	ACKE0001	Pilar Ackerman
Customer	AARONFIT0001	Aaron Fitz Electrical
Start Date	18/06/2009	End Date 26/06/2009
Due Date	27/06/2009	

At the bottom, there are navigation arrows and a 'Job Number' dropdown menu.

To enter data into a Form:

1. Open the Form.
2. Enter values for the ID and Description fields.
3. Enter values for the fields on the Form.
4. Click Save.

To delete a Form record:

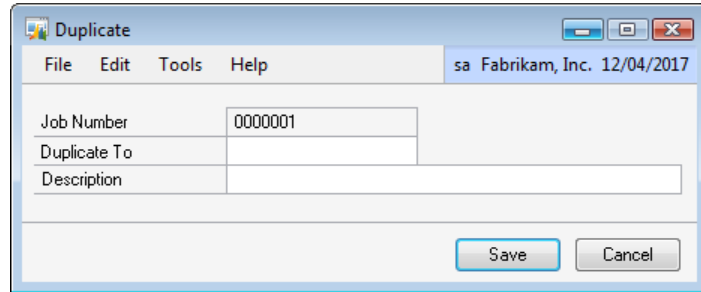
1. Open the Form.
2. Enter the ID of the record that you want to remove.
3. Click Delete.

Duplicating Form Records

The duplicate function on an Extender Form allows you to create an exact copy of a record on a Form with a new ID field.

To duplicate a Form record:

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



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

Modifying an existing Form

You can make changes to a Form using the Extender Forms window.

To modify an existing Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Forms from the Extender Objects list.
3. Click Open or enter CTRL+O.
4. Enter new information for the Form.
5. Click Save.

Adding extra windows to a Form

Use the Extra Windows window to add extra windows to the Form.

An extra window allows you to increase the number of fields available for data entry as well as adding the ability to enter notes on an Extender Form.

There are three types of extra window, Standard, Note and Note List. A Standard extra window allows you to define 15 additional data entry fields. A Note extra window allows you to enter a single note. A Note List extra window allows you to enter a list of date, time and user tracked notes.

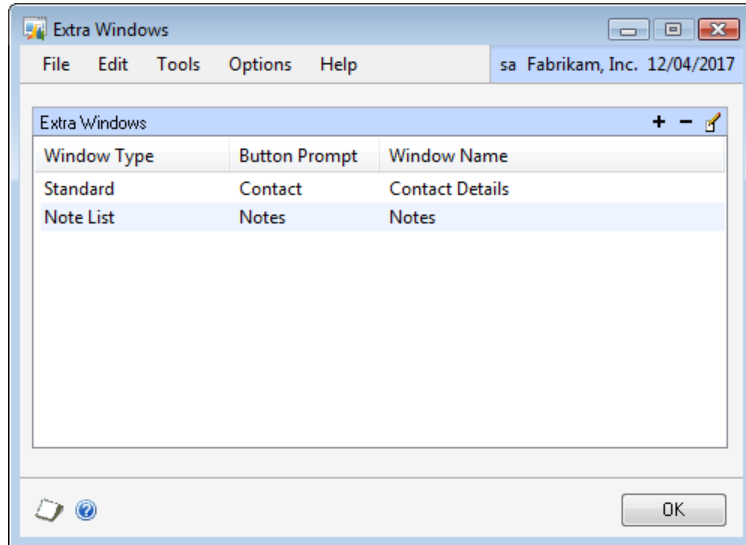
When an extra window is added to a Form, a button is added to the bottom of the Form. Clicking on the button opens the extra window. The Button Prompt field on the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the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



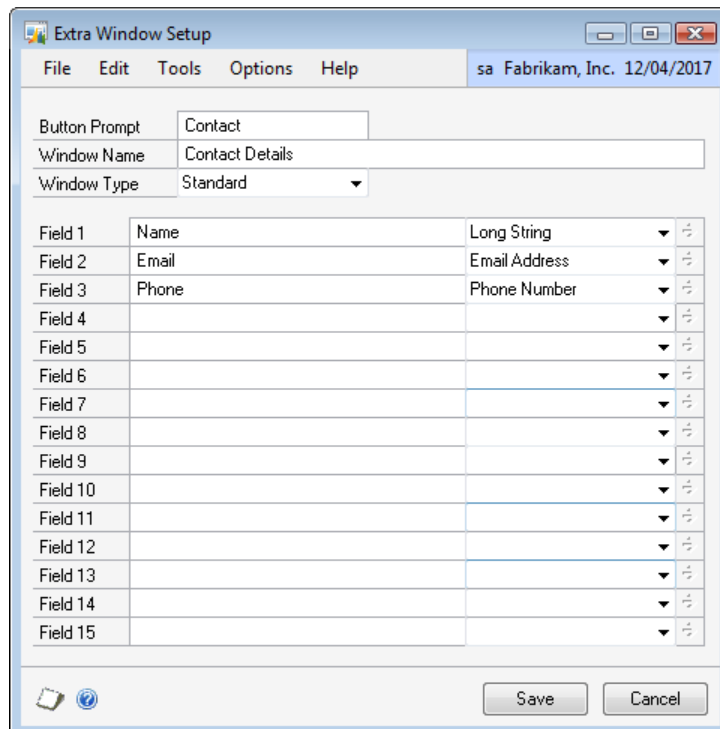
You can have a maximum of 50 extra windows on a Form. Only eight of these windows are displayed on the main window. Other extra windows are accessible from the Extras menu.

To add an extra data entry window:

1. Click Extra Windows.



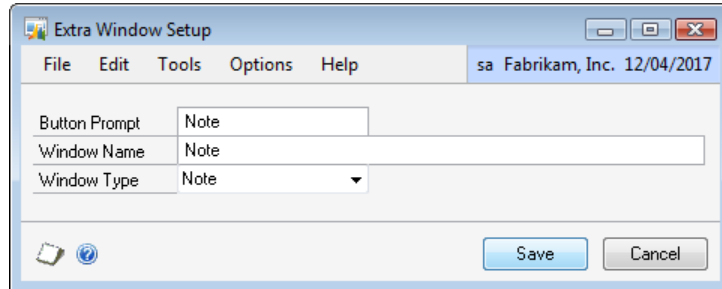
2. Click the Add button above the Extra Windows list.



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

To add a notes window:

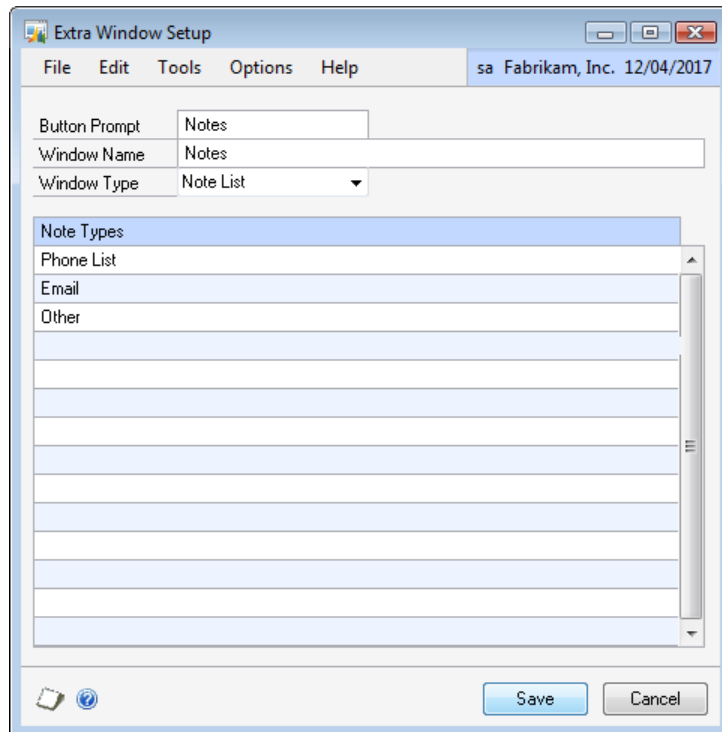
1. Click Extra Windows.
2. Click the Add button above the Extra Windows list.



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

To add a detailed notes window:

1. Click Extra Windows.
2. Click the Add button above the Extra Windows list.



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

Setting Form options

Use the Options window to set required fields, create a SmartList from the Form data, create a lookup based on the form, set the ID field to auto-increment and set the form to be read only.

To set required fields for the Form:

1. Click Options.

The screenshot shows the 'Options' dialog box. The 'Required Fields:' section is expanded, showing a list of fields with checkboxes. The following fields are checked: Description, Job Type, Status, and Assigned To. The following fields are unchecked: Customer, Start Date, End Date, and Due Date. The 'Auto-increment ID Field' checkbox is also unchecked. The 'Add To Lookup List' and 'Add To SmartList' checkboxes are unchecked. The 'Save' and 'Cancel' buttons are visible at the bottom right.

2. Mark the fields that you want to be required.
3. Click Save.

To add the Form to SmartList:

1. Click Options.
2. Mark the Add to SmartList option.
3. Enter the SmartList Name.
4. Click Save.

If you want to reference the Form in another Extender resource, you need to make the form available as a lookup.

To make the form available as a lookup:

1. Click Options.
2. Mark the Add to Lookup List option
3. Enter the Lookup Description
4. Click Save.

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

To set the ID field to auto-increment:

1. Click Options.
2. Mark the Auto-increment ID Field option.
3. Enter the Next ID Field Value.
4. Click Save.

To set the Form as read only:

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

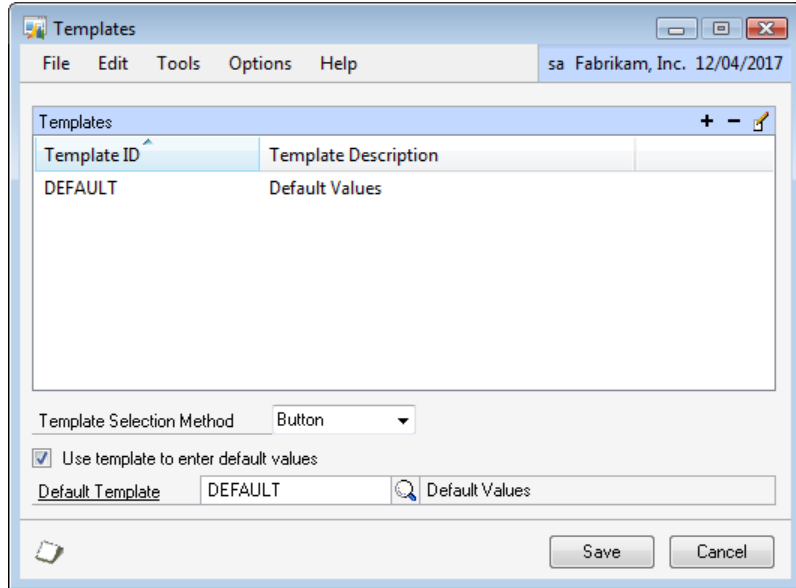
Creating Form templates

Use the Templates window to add new Form templates.

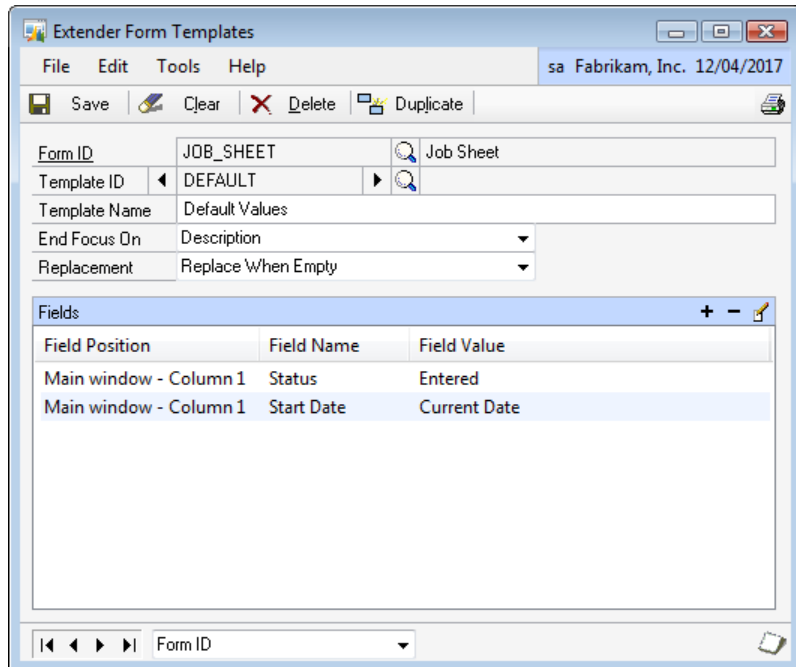
A Form template is a set of default values for fields on the Form. They can be used to enter data more quickly by automatically assigning values.

To create a template:

1. Click Templates.



2. Click the Add button above the Templates list



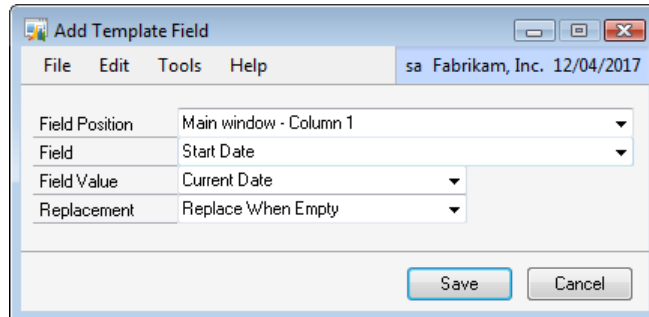
3. Enter an ID and Description for the template
4. Select the field that the template will End Focus On

5. Select the default replacement option

6. Add fields to the template

To add a field to the template:

1. Click the Add button above the Fields list.



2. Select the position of the field that you want to default.

3. Select the field that you want to default.

4. Select the Field Value.

5. Select the Replacement option.

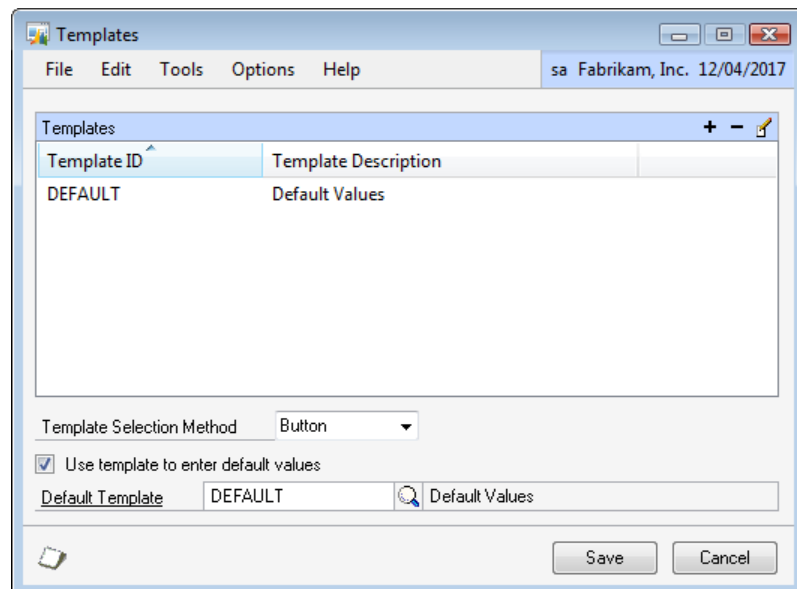
6. Click Save.

Setting Form template options

You can use the Templates window to set the selection method and default template for the Form. The default template will be automatically applied when a new ID field is entered.

To set template options:

1. Click Templates.



2. Select the Selection Method.
3. Enter the Default Template.
4. Click Save.

Using Form templates

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

If the Button selection method is chosen, there will be a template button available on your Form. Clicking on this button will display a list of templates.

If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.

If the Prompt selection method is chosen, a window will open prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the Extender Form.
2. Enter the ID field value.
3. Click Templates.
4. Select the Template from the list.

To select a template (Menu Selection Method):

1. Open the Extender Form.
2. Enter the ID field value.
3. Select the template from the Templates menu.

To select a template (Prompt Selection Method):

1. Open the Extender Form.
2. Enter the ID field value.
3. Select the template from the Template Selection window.

Removing Forms

If you don't need a Form, you can remove it using the Extender Forms window. If you have already entered data for the Form, the data will also be deleted.

To remove a Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Forms from the Extender Objects list.
3. Select the Form that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 12: Detail Forms

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

This information is divided into the following sections:

- [Adding a new Detail Form](#)
- [Using Detail Forms](#)
- [Modifying an existing Detail Form](#)
- [Adding extra windows to a Detail Form](#)
- [Auto Notes](#)
- [Setting Detail Form options](#)
- [Creating Detail Form templates](#)
- [Setting Detail Form template options](#)
- [Using Detail Form templates](#)
- [Removing Detail Forms](#)

Adding a new Detail Form

Use the Extender Detail Forms window to define new Detail Forms. Each form that you create will have an ID and a Description field. The ID field is the unique identifier for the form record. The description field is a description of the record.

To add a new Detail Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Detail Forms from the Extender Objects list.
3. Click New or enter CTRL+N.

The screenshot shows the 'Extender Detail Forms' window with the following configuration:

Form ID	REBATE		
Form Name	Rebate Contracts		
ID Field Prompt	Contract Number		
Description Prompt	Description		

Header Column 1		
Field 1	Customer	Lookup
Field 2		
Field 3	Start Date	Date
Field 4	End Date	Date
Field 5		
Field 6		

Header Column 2		
Field 1		
Field 2		
Field 3		
Field 4		
Field 5		
Field 6		

Detail Fields			R1	R2
Field 1	Item	Lookup	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field 2	Threshold	Currency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field 3	Percentage	Percentage	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Field 4			<input type="checkbox"/>	<input type="checkbox"/>
Field 5			<input type="checkbox"/>	<input type="checkbox"/>
Field 6			<input type="checkbox"/>	<input type="checkbox"/>
Field 7			<input type="checkbox"/>	<input type="checkbox"/>
Field 8			<input type="checkbox"/>	<input type="checkbox"/>
Field 9			<input type="checkbox"/>	<input type="checkbox"/>
Field 10			<input type="checkbox"/>	<input type="checkbox"/>
Field 11			<input type="checkbox"/>	<input type="checkbox"/>
Field 12			<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Multicurrency, Templates, Extra Windows

4. Enter an ID and Description for the Detail Form.
5. Select the ID Field Prompt and Description Prompt.
6. Enter prompts and select field types for fields 1 to 6 in Column 1 of the header.
7. Enter prompts and select field types for fields 1 to 6 in Column 2 of the header.
8. Enter prompts and select field types for fields 1 to 12 of the detail fields.

For more information on each field type, see [Chapter 6, “Field Types”](#).

9. Mark R1 to place the detail field into the first row. Mark R2 to place the detail field into the second row.



You must have at least one field on one of the detail field rows.

10. Click Save.



If a detail field is not marked as Row 1 or Row 2, it is still accessible on an expansion window. This window can be opened by clicking on the expansion button above the first field of the first row on the scrolling window.

Using Detail Forms

After creating a Detail Form, you can test it using the main Extender window. The user interface for a Detail Form is the same as a standard Microsoft Dynamics GP window, using the same fields and controls.

To open a Detail Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Detail Forms from the Extender Objects list.
3. Select the Detail Form that you want to open from the Extender Resources list
4. Click the GoTo button and select Use Form or enter CTRL+U

Item	Threshold	Percentage
100XLG	\$1,000.00	10.00%
1-A3261A	\$0.00	5.00%
2-A3284A	\$2,000.00	7.50%
32X IDE	\$500.00	2.00%
	\$0.00	0.00%

To enter data into a Detail Form:

1. Open the Detail Form.
2. Enter values for the ID and Description fields.
3. Enter values for the fields on the Detail Form.
4. Enter values for the fields of the detail lines on the Detail Form.
5. Click Save.

To delete a Detail Form record:

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

The duplicate function on an Extender Detail Form allows you to create an exact copy of a record on a Detail Form with a new ID field.

To duplicate a Detail Form record:

1. Open the Detail Form.
2. Enter the ID of the record that you want to duplicate.
3. Click Duplicate.
4. Enter a new ID field.
5. Click Save.

Modifying an existing Detail Form

You can make changes to a Detail Form using the Extender Detail Forms window.

To modify an existing Detail Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Forms from the Extender Objects list.
3. Click Open or enter CTRL+O.
4. Enter new information for the Detail Form.
5. Click Save.

Adding extra windows to a Detail Form

Use the Extra Windows window to add extra windows to the Detail Form.

An extra window allows you to increase the number of fields available for data entry as well as adding the ability to enter notes on an Extender Detail Form.

There are four types of extra window, Standard, Logic, Note and Note List. A Standard extra window allows you to define 15 additional data entry fields. Logic extra windows do not open a window at all; instead a logic event is triggered. A Note extra window allows you to enter a single note. A Note List extra window allows you to enter a list of date, time and user tracked notes.

When an extra window is added to a Detail Form, a button is added to the bottom of the Detail Form. Clicking on the button opens the extra window. The Button Prompt field on

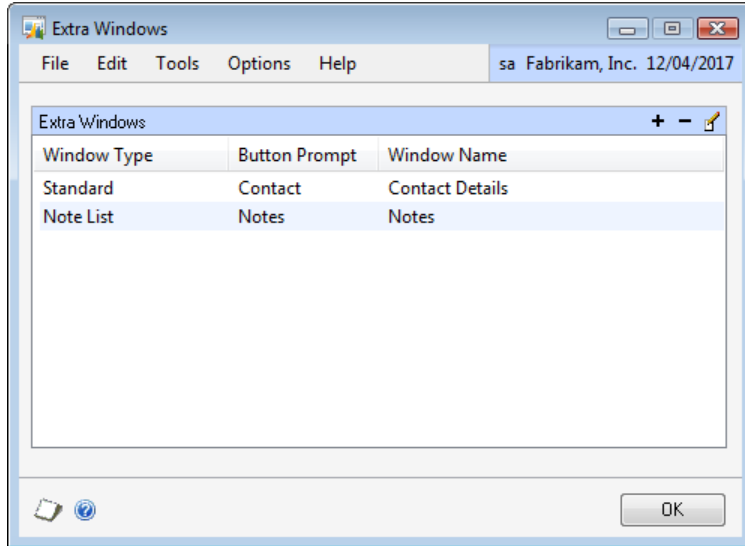
the extra window definition controls the label of the extra window button. The Window Name field on the extra window definition controls the title of the extra window.



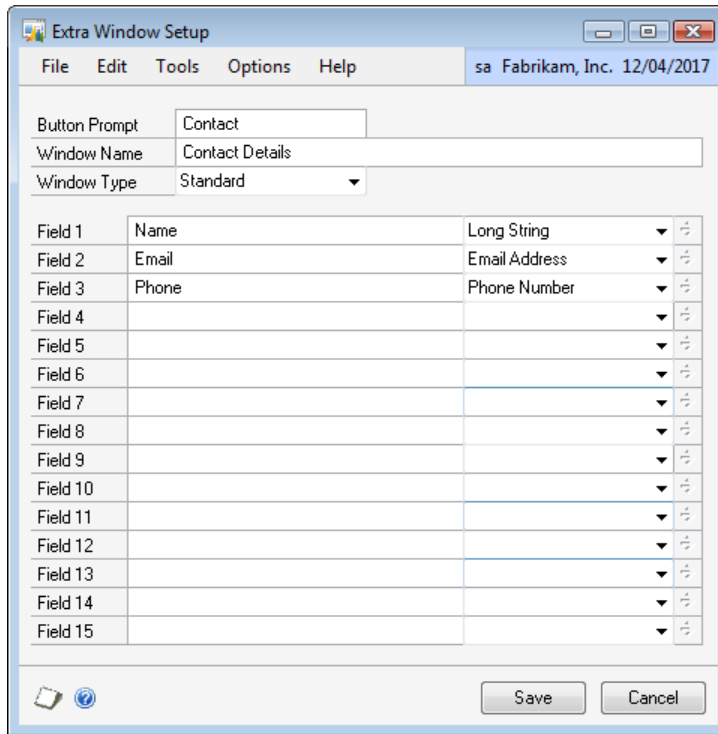
You can have a maximum of 50 extra windows on a Detail Form. Only four of these windows will have buttons displayed on the main window. The other extra windows are available from the Extras menu.

To add an extra data entry window:

1. Click Extra Windows.



2. Click the Add button above the Extra Windows list.

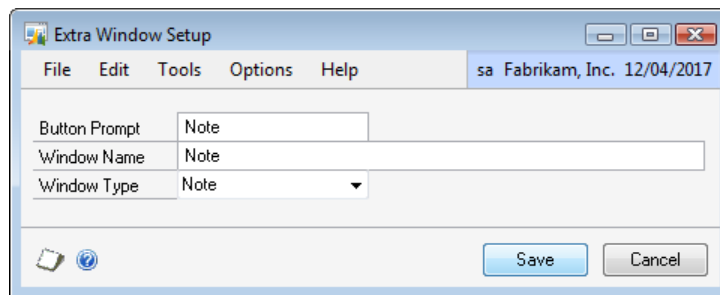


3. Enter a Button Prompt and Window Name.

4. Select Standard as the Window Type.
5. Enter prompts and select field types for fields 1 to 15.
6. Click Save.

To add a notes window:

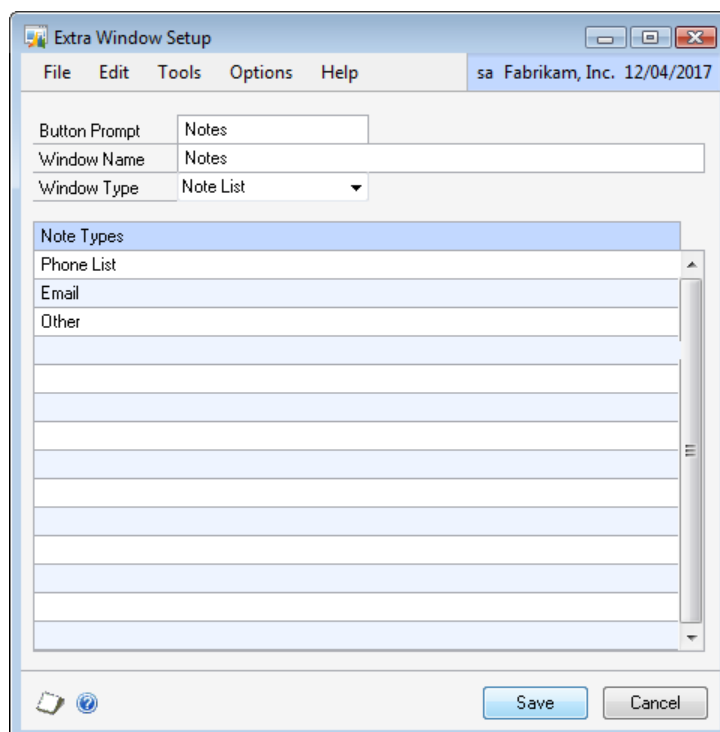
1. Click Extra Windows.
2. Click the Add button above the Extra Windows list.



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

To add a detailed notes window:

1. Click Extra Windows.
2. Click the Add button above the Extra Windows list.



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

Setting Detail Form options

Use the Options window to set required fields, create SmartList objects from the Detail Form data, create a lookup based on the Detail Form, select a total field and set the ID field to auto-increment.

To set required fields for the Detail Form:

1. Click Options.

2. Mark the fields that you want to be required.
3. Click Save.

Detail Forms can be used to generate two SmartList objects, one will show the header information only, and the other will show both header and detail information.

To add the Detail Form to SmartList:

1. Click Options.

The screenshot shows the 'Options' dialog box for a SmartList. The 'Add Header to SmartList' and 'Add Detail to SmartList' options are checked. The 'SmartList Name' for the header is 'Rebate Contracts' and for the detail is 'Rebate Contract Lines'. The 'Required Fields' section is empty. The 'Add To Lookup List' option is unchecked.

2. Mark the Add Header to SmartList option.
3. Enter the Header SmartList Name.
4. Mark the Add Detail to SmartList option.
5. Enter the Detail SmartList Name.
6. Click Save.

If you want to reference the Detail Form in another Extender resource, you need to make it available as a lookup.

To make the Detail Form available as a lookup:

1. Click Options.
2. Mark the Add To Lookup List option.
3. Enter the Lookup Description.
4. Click Save.

To display a total field on the Detail Form:

1. Click Options.
2. Mark the Show Total option.
3. Select the detail field that you want to total.
4. Click Save.

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

To set the ID field to auto-increment:

1. Click Options.
2. Mark the Auto-increment ID Field option.
3. Enter the Next Field ID value.
4. Click Save.

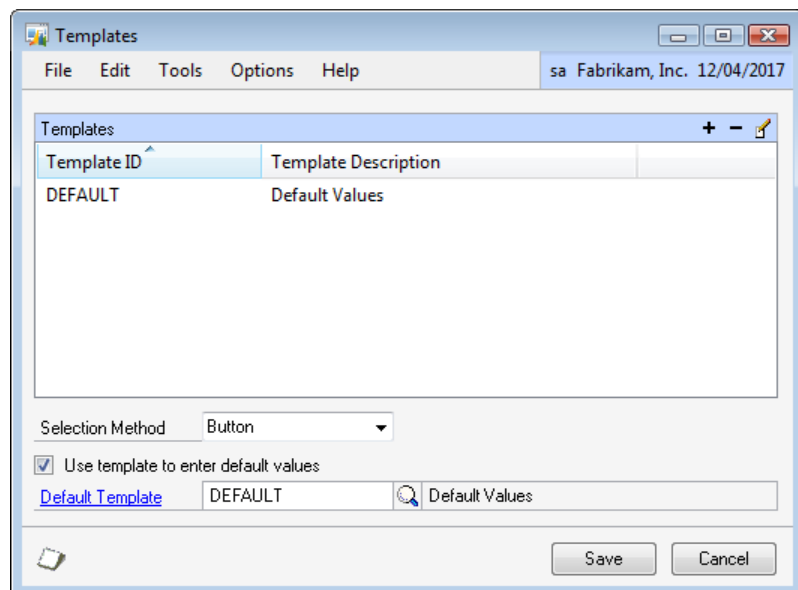
Creating Detail Form templates

Use the Templates window to add new Detail Form templates.

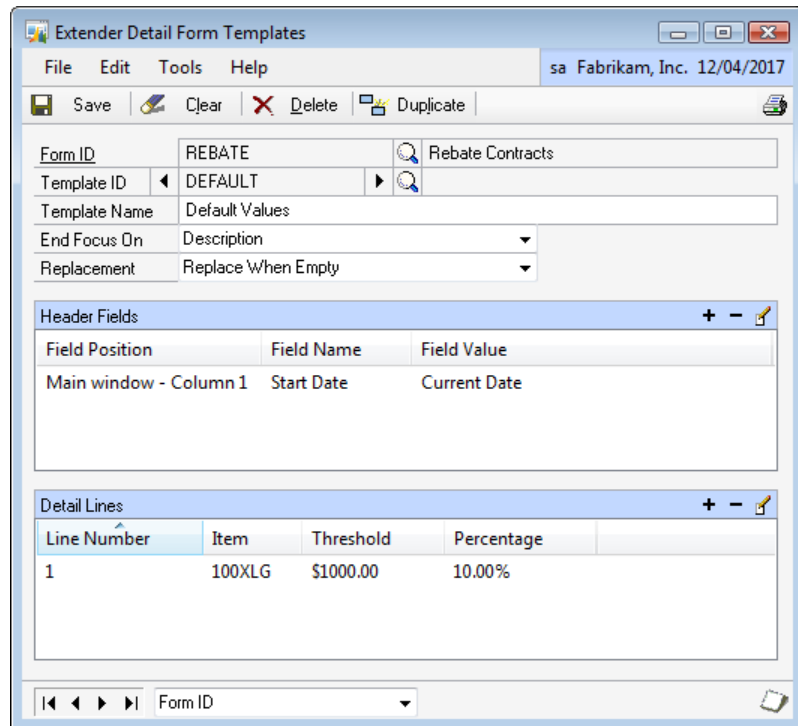
A Detail Form template is a set of default values for fields and detail lines on the Detail Form. They can be used to enter data more quickly by automatically assigning values and entering lines.

To create a template:

1. Click Templates.



2. Click the Add button above the Templates list.



3. Enter an ID and Description for the template.

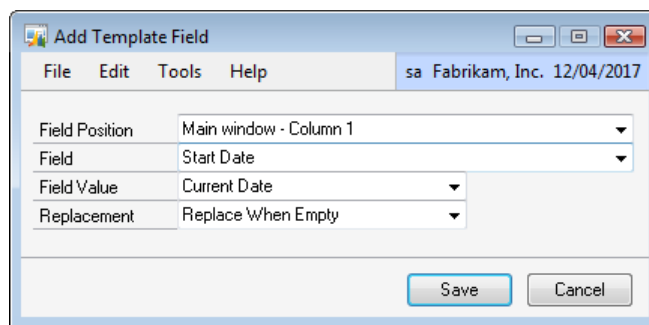
4. Select the field that the template will End Focus On.

5. Select the default replacement option.

6. Add fields to the template.

To add a field to a template:

1. Click the Add button above the Header Fields list.



2. Select the position of the field that you want to default.

3. Select the field that you want to default.

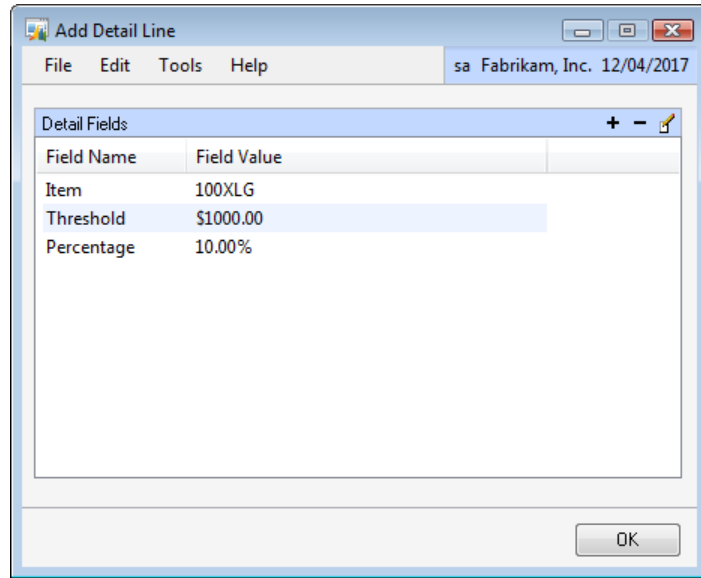
4. Select the Field Value.

5. Select the Replacement option.

6. Click Save.

To add a detail line to a template:

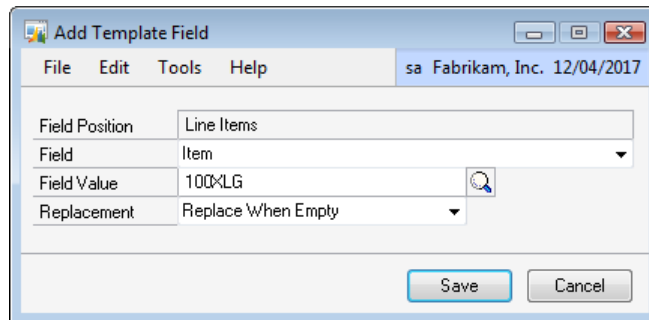
1. Click the Add button above the Detail Lines list.



2. Add fields to the detail line.
3. Click OK.

To add a field to a detail line:

1. Click the Add button above the Detail Fields list.



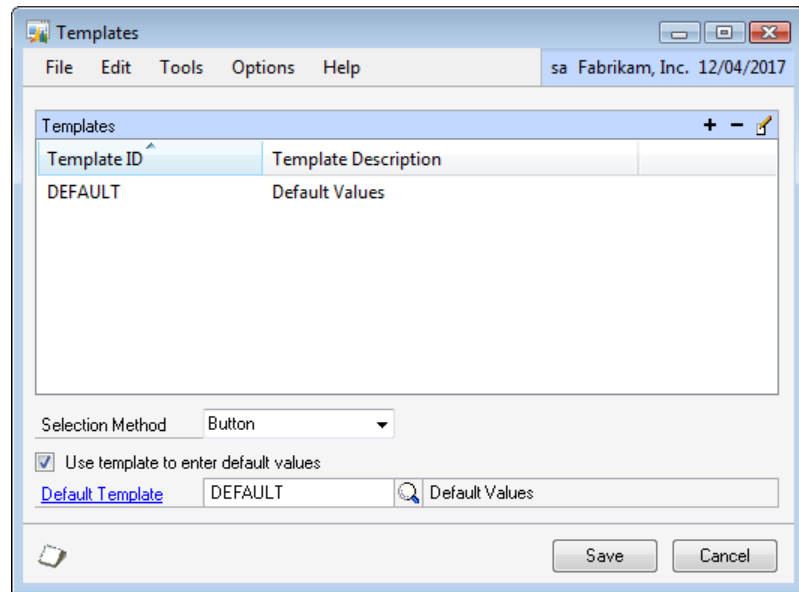
2. Select the field that you want to default.
3. Select the Field Value.
4. Select the Replacement option.
5. Click Save.

Setting Detail Form template options

You can use the Templates window to set the selection method and default template for the Detail Form. The default template will be automatically applied when a new ID field is entered.

To set template options:

1. Click Templates.



2. Select the Selection Method.
3. Enter the Default Template.
4. Click Save.

Using Detail Form templates

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

- If the Button selection method is chosen, there will be a template button available on your Detail Form. Clicking on this button will display a list of templates.
- If the Menu selection option is chosen, the Templates menu will be enabled. You will be able to select the template from the Templates menu.
- If the Prompt selection method is chosen, a window will open prompting you for the template you want to use.

To select a template (Button Selection Method):

1. Open the Extender Detail Form.
2. Enter the ID field value.
3. Click Templates.
4. Select the Template from the list.

To select a template (Menu Selection Method):

1. Open the Extender Detail Form.
2. Enter the ID field value.
3. Select the template from the Templates menu.

To select a template (Prompt Selection Method):

1. Open the Extender Detail Form.
2. Enter the ID field value.
3. Select the template from the Template Selection window.

Removing Detail Forms

If you don't need a Detail Form, you can remove it using the Extender Detail Forms window. If you have already entered data for the Detail Form, the data will also be deleted.

To remove a Detail Form:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Forms from the Extender Objects list.
3. Select the Detail Form that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Part 4: Data Entry Tools

This portion of the manual describes the features of Extender that enhance the data entry features of Extender.

The information is divided into the following chapters:

[Chapter 13, “Lookups”](#), describes how to create a new lookup window from existing Microsoft Dynamics GP data.

[Chapter 14, “Imports”](#), describes how to create an import and import data into an Extender data entry object.

[Chapter 15, “Menus”](#), describes how to create an Extender menu

Chapter 13: Lookups

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

This information is divided into the following sections:

[Adding a new Lookup](#)

[Modifying an existing Lookup](#)

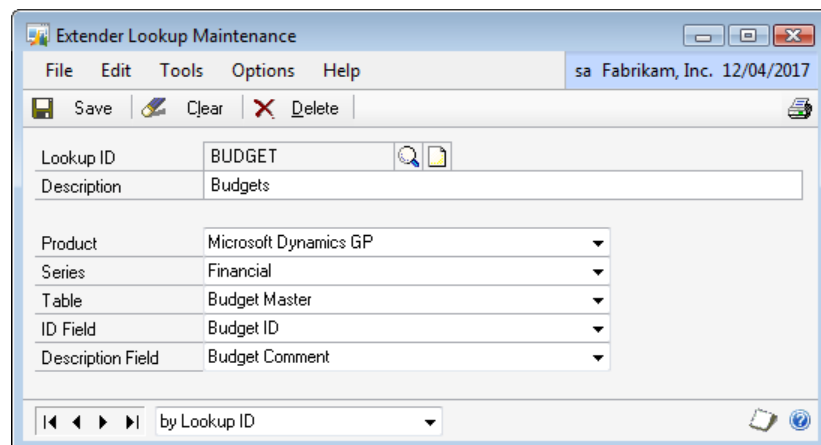
[Removing Lookups](#)

Adding a new Lookup

Use the Extender Lookups window to define new Lookups.

To add a new Lookup:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Lookups from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Lookup.
5. Select the Product, Series and Table for the Lookup.
6. Select the ID Field and Description Field for the Lookup.
7. Click Save.

Modifying an existing Lookup

You can make changes to a Lookup using the Extender Lookups window.

To modify an existing Lookup:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Lookups from the Extender Objects list.
3. Select the Lookup that you want to modify from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Enter the new information for the Lookup.
6. Click Save.

To update Lookup values:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Lookups from the Extender Objects list.
3. Select the Lookup that you want to modify from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Select Options >> Initialize Lookup Values.

Removing Lookups

If you don't need a Lookup, you can remove it using the Extender Lookups window.

To remove a Lookup:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Detail Forms from the Extender Objects list.
3. Select the Detail Form that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 14: Imports

Extender Import can be used to import data into an Extender Window, Detail Window, Form or Detail Form.

This information is divided into the following sections:

[Adding a new Import](#)

[Using Imports](#)

[Modifying an existing Import](#)

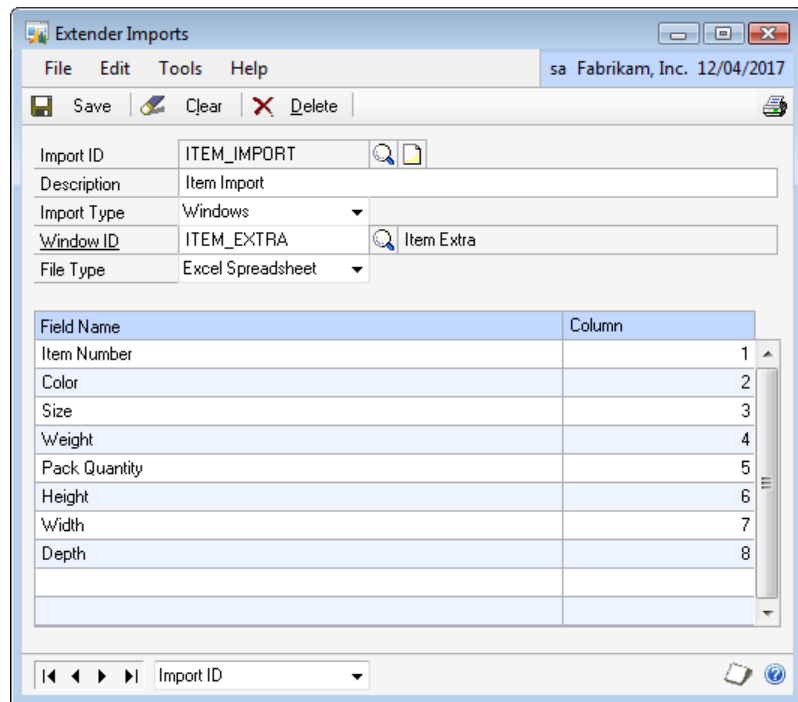
[Removing Imports](#)

Adding a new Import

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

To add a new Import:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Imports from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Import.
5. Select the Extender resource type as the Import Type.
6. Select the Extender resource ID.
7. Select the File Type.

8. Map the Extender fields to the position in the file.

If the File Type is Excel, select the Row numbers corresponding to each Extender field that you want to import

If the File Type is tab or comma delimited, select the field number in the file corresponding to each Extender field that you want to import

If the File Type is fixed width, select the start and end positions of each Extender field that you want to import



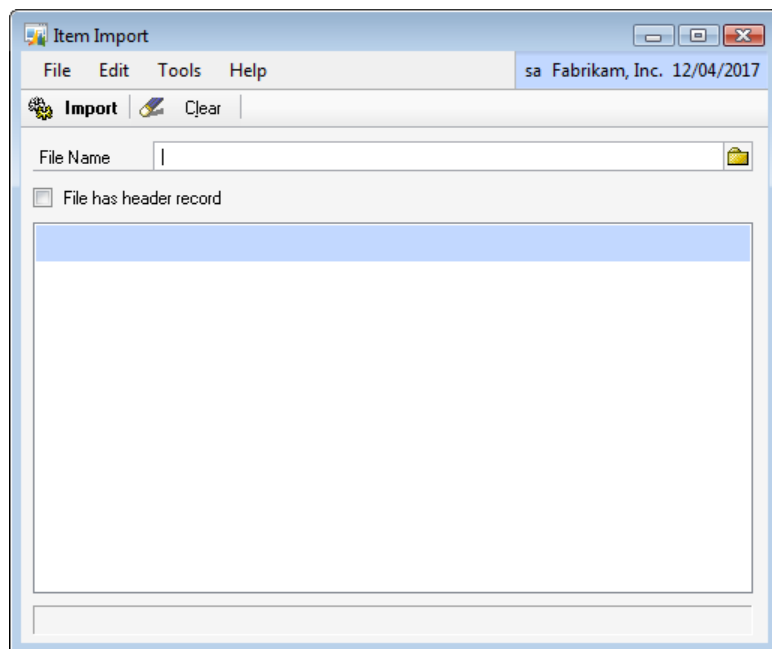
If the field position is left empty, that field will be left blank by the import

Using Imports

You can use the Extender main window to access an import once it has been saved. You can also add an Import window to an Extender Menu. See [Chapter 15, “Menus”](#) for more details.

To import records:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Imports from the Extender Objects list.
3. Select the Import that you want to import data for from the Extender Resources list.
4. Click Additional Options and select Use Import or enter CTRL+U.



5. Enter the file that contains the data to import.

6. If the file selected has a header record, mark the File has header record option.

7. Click Import.

Modifying an existing Import

You can make changes to an Import using the Extender Imports window.

To modify an existing Import:

1. Open the Extender Window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Imports from the Extender Objects list.
3. Select the Import that you want to modify from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Enter the new information for the Import.
6. Click Save.

Removing Imports

If you don't need an Import, you can remove it using the Extender Imports window.

To remove an Import:

1. Open the Extender Window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Imports from the Extender Objects list.
3. Select the Import that you want to remove from the Extender Resources list
4. Click Open or enter CTRL+O.
5. Click Delete.

Chapter 15: Menus

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

This information is divided into the following sections:

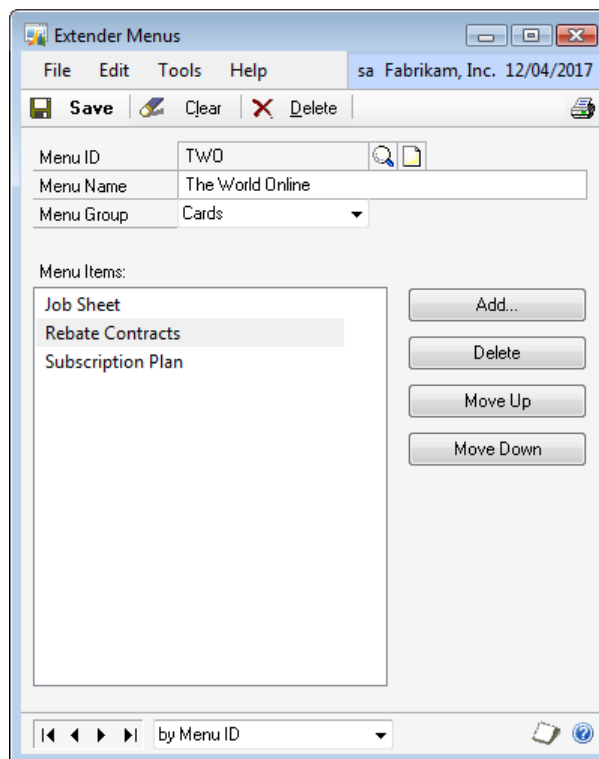
- [Adding a new Menu](#)
- [Modifying an existing Menu](#)
- [Sorting Menu items](#)
- [Removing Menus](#)

Adding a new Menu

Use the Extender Menus window to define new Menus. You can add Extender Forms, Extender Detail Forms and Extender Imports to a menu.

To add a new Menu:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Menus from the Extender Objects list.
3. Click New or enter CTRL+N.

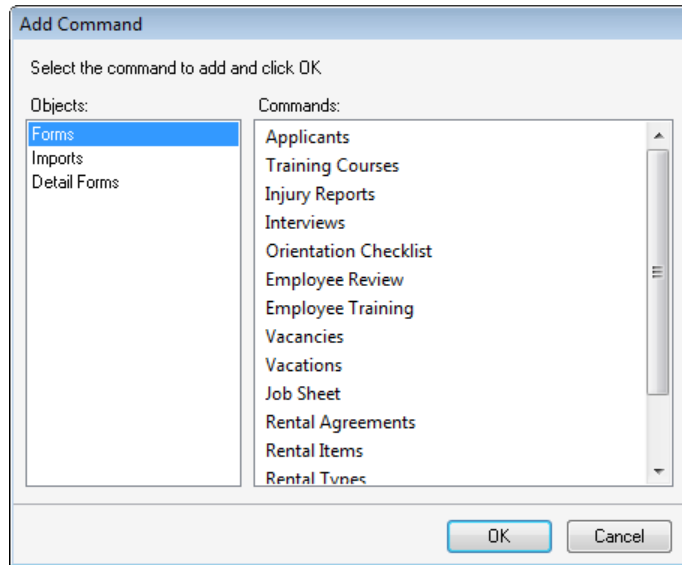


4. Enter an ID and Description for the Menu.

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

To add a Menu item:

1. Click the Add button to open the Add Command window.



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

To remove a Menu item:

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



You will need to restart Microsoft Dynamics GP before the menu will be available

Modifying an existing Menu

You can make changes to a Menu using the Extender Menus window.

To modify an existing Menu:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Menus from the Extender Objects list.
3. Select the Menu that you want to modify from the Extender Resources list.

4. Click Open or enter CTRL+O.
5. Enter the new information for the Menu.
6. Click Save.

Sorting Menu items

You can use the Extender Menus window to change the order in which items on the menu are displayed.

To change the order of an item on a Menu:

1. Select the Menu item you want to move
2. Click Move Up to move the menu item up and click Move Down to move the menu item up. If the selected menu item is already the first item in the menu, the Move Up button will be disabled. If the selected menu item is already the last item in the menu, the Move Down button will be disabled.



You will need to restart Microsoft Dynamics GP before the menu will be changed

Removing Menus

If you don't need a Menu, you can remove it using the Extender Menus window.

To remove a Menu:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Menus from the Extender Objects list.
3. Select the Menu that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL+O.
5. Click Delete.

Part 5: Automation

This portion of the manual describes the automation features of Extender. These features allow Microsoft Dynamics GP users to use the application in a more efficient and more accurate manner.

The information is divided into the following chapters:

[Chapter 16, “Macros”](#), describes how to set up automatically running macros.

[Chapter 17, “Dialogs”](#), describes how to set up reminder messages.

Chapter 16: Macros

This chapter will guide you through the creation of an Extender Macro. A Microsoft Dynamics GP macro is a recording of each key you pressed or mouse click you made while performing a procedure. An Extender Macro enhances the Microsoft Dynamics GP macro system by automating the playing of macros.

This information is divided into the following sections:

[Adding a new Macro](#)

[Modifying an existing Macro](#)

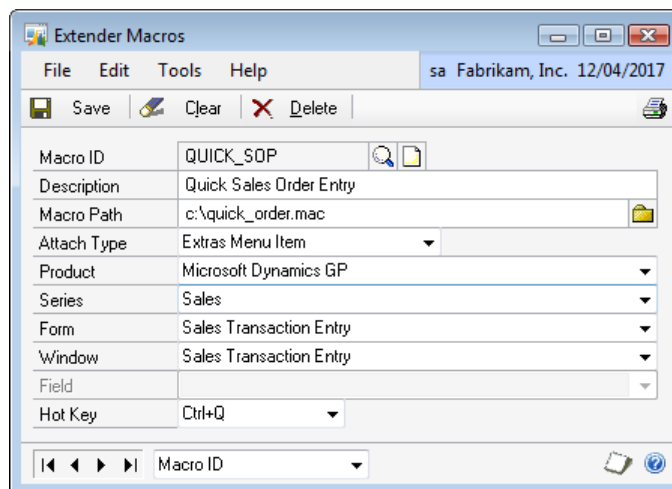
[Removing Macros](#)

Adding a new Macro

Use the Extender Macros window to define new Macros.

To add a new Macro:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Macros from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Macro.
5. Select the Macro file.
6. Select the Attach Type.
7. Select the Product, Series, Form and Window to link the Macro to.

8. If the Attach Type option is Field Exit or Field Entry, select the Field to link the Macro to.
9. If the Attach type is Additional Menu Item, select the Hot Key
10. Click Save.

Modifying an existing Macro

You can make changes to a Macro using the Extender Macros window.

To modify an existing Macro:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Macros from the Extender Objects list.
3. Select the Macro that you want to modify from the Extender Resources list.
4. Click Open or enter `CTRL + O`.
5. Enter the new information for the Macro.
6. Click Save.

Removing Macros

If you don't need a Macro, you can remove it using the Extender Macros window.

To remove a Macro:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Macros from the Extender Objects list.
3. Select the Macro that you want to remove from the Extender Resources list.
4. Click Open or enter `CTRL + O`.
5. Click Delete.

Chapter 17: Dialogs

This chapter will guide you through the creation of an Extender Dialog. An Extender Dialog opens a window to present data to the user.

This information is divided into the following sections:

[Adding a new Dialog](#)

[Modifying an existing Dialog](#)

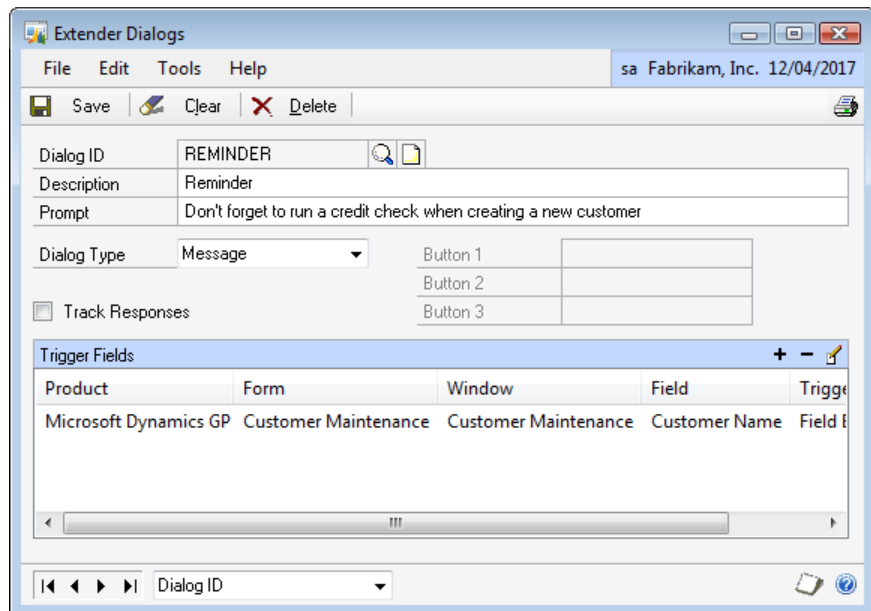
[Removing Dialogs](#)

Adding a new Dialog

Use the Extender Dialogs window to define new Dialogs.

To add a new Dialog:

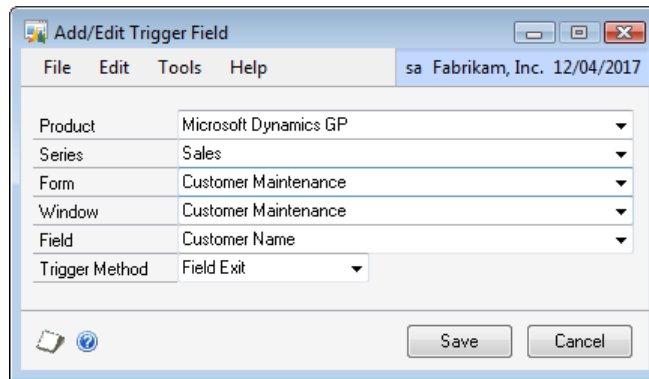
1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Dialogs from the Extender Objects list.
3. Click New or enter CTRL+N.



4. Enter an ID and Description for the Dialog.
5. Enter the Prompt value
6. Select the Dialog Type
7. If the Dialog Type is Ask, enter values for the Button Prompts
8. Add the Trigger Fields
9. Click Save.

To add a Trigger Field:

1. Click the Add button above the Trigger Fields list



2. Select the Product, Series, Form, Window and Field to trigger the dialog from.
3. Select the Trigger Method.
4. Click Save.

To remove a Trigger Field:

1. Select the field you want to remove from the Trigger Fields list.
2. Click the Remove button above the Trigger Fields list.

To modify a Trigger Field:

1. Select the field you want to modify from the Trigger Fields list.
2. Click the Edit button above the Trigger Fields list.
3. Enter the new information for the trigger field.
4. Click Save.

Modifying an existing Dialog

You can make changes to a Dialog using the Extender Dialogs window.

To modify an existing Dialog:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Dialogs from the Extender Objects list.
3. Select the Dialog that you want to modify from the Extender Resources list.
4. Click Open or enter CTRL + O.
5. Enter the new information for the Dialog.
6. Click Save.

Removing Dialogs

If you don't need a Dialog, you can remove it using the Extender Dialogs window.

To remove a Dialog:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select Dialogs from the Extender Objects list.
3. Select the Dialog that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL + O.
5. Click Delete.

Part 6: Reports

This portion of the manual describes the reports that can be generated by Extender.

The information is divided into the following chapters:

[Chapter 18, “Views”](#), describes how to create a Microsoft SQL Server® view that combines Extender and Microsoft Dynamics GP data for external reporting.

Chapter 18: Views

This chapter will guide you through the creation of an Extender View. An Extender View is used to generate a consolidated view of Microsoft Dynamics GP tables, Extender Windows and Extender Detail Windows. It is useful when you want to use Extender data in external reporting packages such as Crystal Reports or SQL Server Reporting Services. You can only use Views when logged in as a user that is part of the POWERUSER role.

This information is divided into the following sections:

[Adding a new View](#)

[Previewing a View](#)

[Modifying an existing View](#)

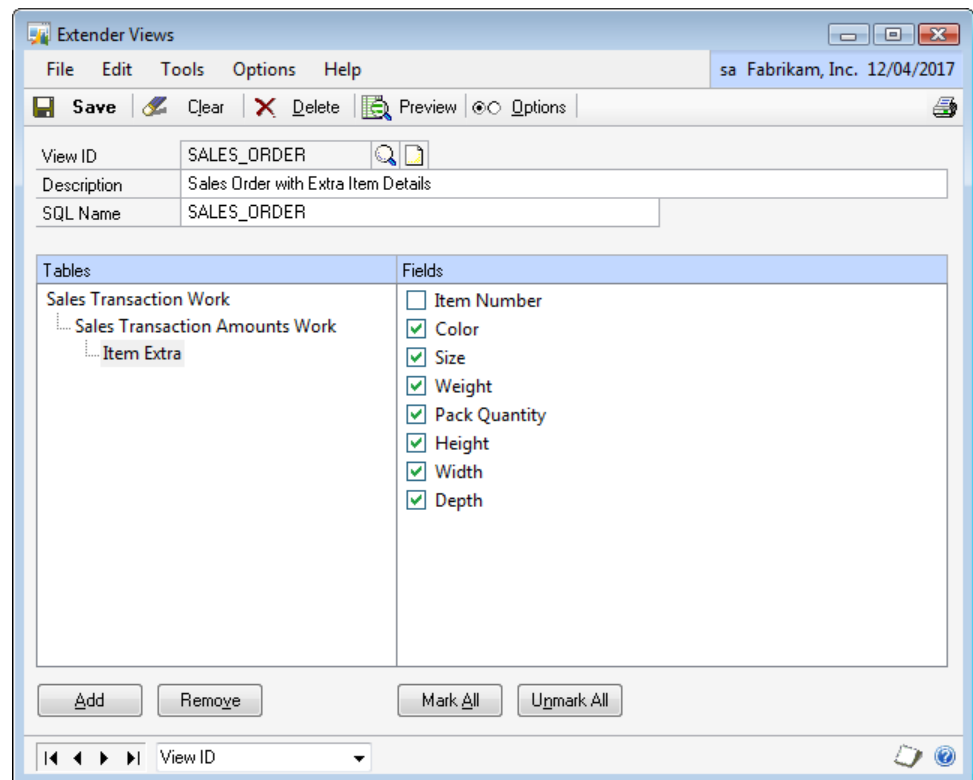
[Removing Views](#)

Adding a new View

Use the Extender Views window to define new Views.

To add a new View:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Views from the Extender Objects list.
3. Click New or enter CTRL+N.

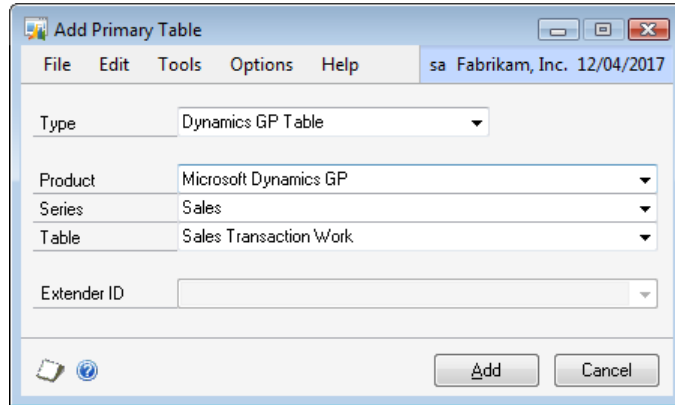


4. Enter an ID and Description for the View.

5. Select the Primary Table
6. Select additional tables.
7. Select fields to include in the view.
8. Click Save.

To select the Primary Table:

1. Click Add.



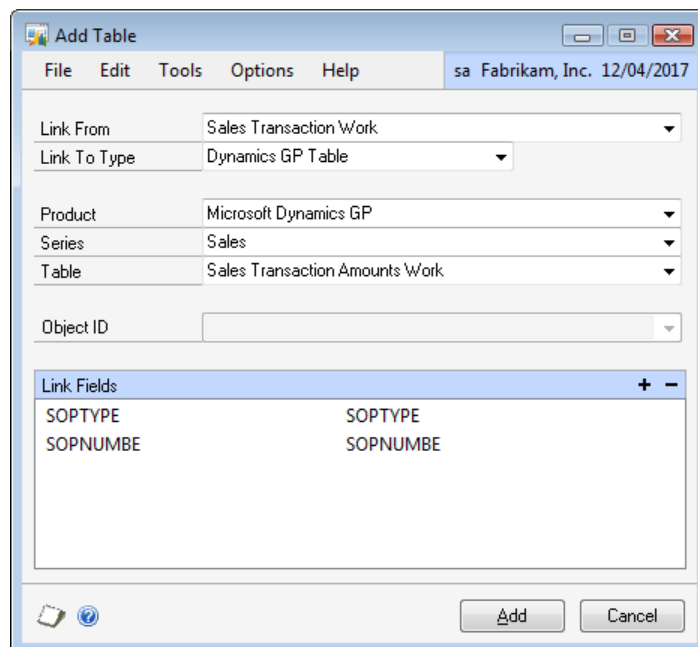
2. Select the Table Type:

If the Type is Microsoft Dynamics GP Table, select the Product, Series and Table.
 If the Type is Extender Window, select the Window ID.

3. Click Save.

To select an additional table:

1. Click Add.



2. Select the table already selected to link the additional table to.

3. Select the Link To Type:

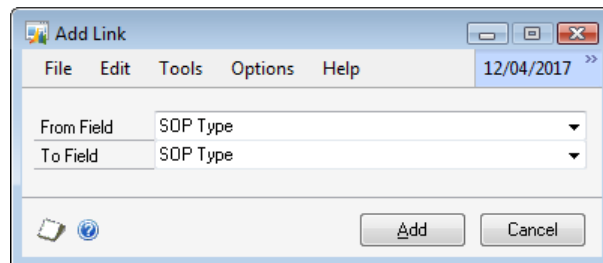
If the Type is Microsoft Dynamics GP Table, select the Product, Series and Table.
If the Type is Extender Window, select the Window ID.

4. Select link fields.

5. Click Add.

To select a link field:

1. Click the Add button above the Link Fields list.



2. Select the Link From Field.

3. Select the Link To Field.

4. Click Add.

To remove a link field:

1. Select the link that you want to remove from the Link Fields list.

2. Click the Remove button above the Link Fields list.

Previewing a View

You can preview a View inside Microsoft Dynamics GP before you use it in external reports.

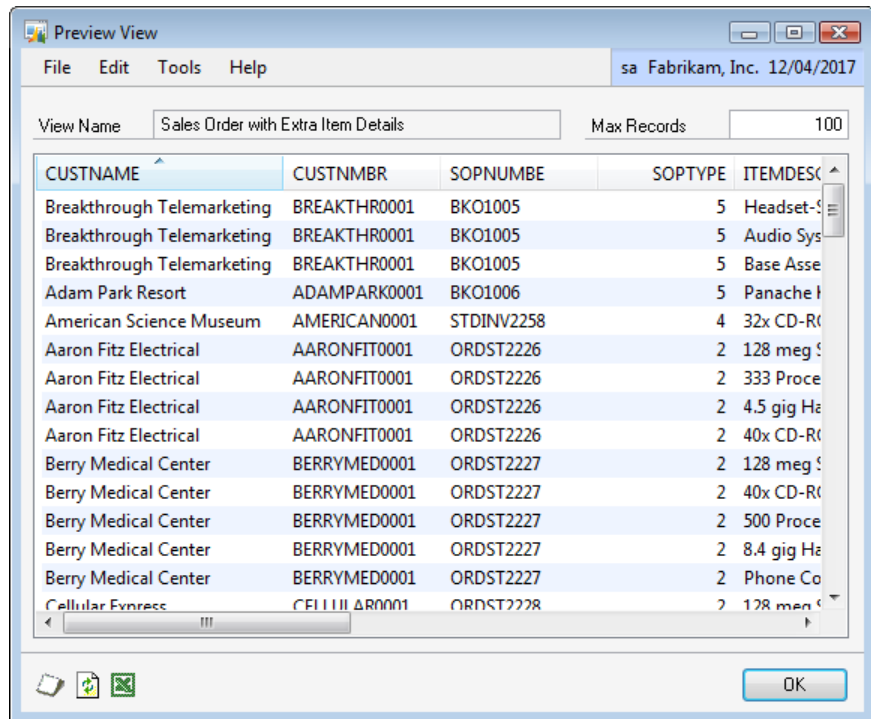
To preview a view:

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

2. Select Views from the Extender Objects list.

3. Select the View that you want to preview from the Extender Resources list.

4. Click the Additional Options button and select Preview View.



Modifying an existing View

You can make changes to a View using the Extender Views window.

To modify an existing View:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Views from the Extender Objects list.
3. Select the View that you want to modify from the Extender Resources list.
4. Click Open or enter CTRL + O.
5. Enter the new information for the View.
6. Click Save.

Removing Views

If you don't need a View, you can remove it using the Extender Views window.

To remove a View:

1. Open the Extender window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender)
2. Select Views from the Extender Objects list.
3. Select the View that you want to remove from the Extender Resources list.
4. Click Open or enter CTRL + O.
5. Click Delete.

Part 7: Maintenance

This portion of the manual describes the maintenance operations that can be performed on Extender.

The information is divided into the following chapters:

[Chapter 19, “Check Links”](#), describes how to repair damaged data in Extender.

[Chapter 20, “Edit Values”](#), describes how to mass modify Extender data.

[Chapter 21, “Options”](#), describes the setup options that control the operation of Extender

Chapter 19: Check Links

This chapter describes how to check links in Extender. Checking links examines tables, checking corresponding information in related tables and, if possible, changing the damaged data to match the corresponding data in an undamaged table.

This information is divided into the following sections:

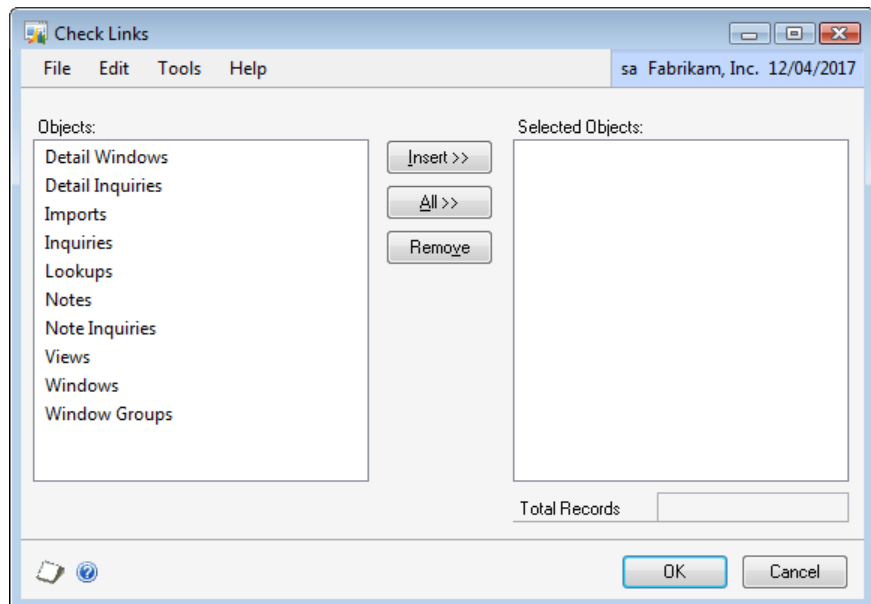
[Checking Links](#)

Checking Links

Extender uses a separate window from the Microsoft Dynamics GP Check Links window to check links.

To check links:

1. Open the Extender Check Links window (Microsoft Dynamics GP menu >> Tools >> Extender >> Maintenance >> Check Links).



2. Select the Extender Objects for which you want to check links.
3. Click OK to start the Check Links routines that have been selected. A report will print displaying the results.

Chapter 20: Edit Values

This chapter describes how to mass modify Extender data.

This information is divided into the following sections:

[Editing Values](#)

[Filling Values](#)

[Changing Values](#)

Editing Values

You can use the Edit Values window to manually change field values for a field type.

To edit field values:

1. Open the Extender main window (Microsoft Dynamics GP menu >> Tools >> Extender >> Extender).
2. Select the Extender object and resource that you want to edit values for
3. Select Edit All Records from the Additional Options button list to open the Edit Extender Records window.
4. Select the field to edit from the Record Values button list.
5. Enter new values for the field.
6. Click Save to commit the changes.



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

Filling Values

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

To fill field values:

1. Open the Extender main window.
2. Select the Extender object and resource that you want to edit values for.
3. Select Edit All Records from the Additional Options button list to open the Edit Extender Records window.
4. Select the field to edit from the Record Values button list.
5. Click the Fill button to open the Fill Records window.
6. Select the Fill Type. Select All Records if you want to update the values of the field for all records. Select Only Empty Records if you only want to set the values of fields that do not already have a value entered.

7. Enter the value to set the field
8. Click the Fill button.
9. Click Save to commit the changes.

Changing Values

You can use the Edit Values window to change the value of a field from one value to another for all records.

To change field values:

1. Open the Extender main window.
2. Select the Extender object and resource that you want to edit values for.
3. Select Edit All Records from the Additional Options button list to open the Edit Extender Records window.
4. Select the field to edit from the Record Values button list.
5. Click Change to open the Change Records window.
6. Enter the field value to change the field from and the field value to change to field to.
7. Click Change.
8. Click Save to commit the changes.

Chapter 21: Options

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

This information is divided into the following sections:

[Setting Options](#)

[Auto-update SmartList](#)

[Write Back Unused Field IDs](#)

Setting Options

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

To set options:

1. Open the Extender Options window (Microsoft Dynamics GP menu >> Tools >> Extender >> Options).
2. Mark the options that you want to set and unmark the options that you want to clear.
3. Click OK to save the changes.

Auto-update SmartList

If this option is set, Extender will automatically check for new SmartList objects and SmartList integrations, and changes in Extender SmartList objects and SmartList integrations each time SmartList is opened. If new or changed objects or integrations are detected, SmartList will be automatically updated to reflect these changes.

If this option is cleared, Extender will not check for new or changed SmartList objects or integrations. Clearing this option will make SmartList open faster.

Write Back Unused Field IDs

If this option is set, the next ID value for Extender Forms and Detail Forms will be reset to the current value when unsaved forms are cleared or deleted.

Appendix A: Adding Extender Window fields to Report Writer reports

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



Only Extender Windows are supported to add to Report Writer. You cannot add data from Extender Notes, Detail Windows, Forms or Detail Forms to Report Writer reports.

This appendix contains the following sections:

- [Adding fields to a Microsoft Dynamics GP report](#)
- [Adding Extender Window \(with multiple keys\) fields to a Microsoft Dynamics GP report](#)

Adding fields to a Microsoft Dynamics GP report

Adding an Extender Window field to a Microsoft Dynamics GP report is a simple process of adding a calculated field to the report. Before you add a field to a report, you should make a note of the Window ID, the key field/s for the window and the number of the field that you want to add.

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

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

1. Select Tools >> Customize >> Report Writer.
2. Select Microsoft Dynamics GP as the Product and click OK.
3. Click Reports to open the Report Writer window.
4. Select the report that you want to modify from the Original Reports list.
5. Click Insert to move the report from the Original Reports list to the Modified Reports list.
6. Select the Report in the Modified Reports list.
7. Click Open to open the Report Definition window.
8. Click the Layout window to open the Report Layout window.
9. If the Toolbox window is not already open, select Layout >> Toolbox to open it.
10. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
11. Enter a Name for the calculated field.
12. Select the Result Type as String.

13. Click the Functions tab and select the User-Defined option.
14. Select System from the Core list and rw_TableHeaderString from the Function list.



The rw_TableHeaderString function has five parameters: Product ID, Window ID, String Key Value, Numeric Key Value, and Field Number

15. Click Add to add the function to the expression string.
16. Select the Constants tab and select Integer as the Type.
17. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.
18. Select String as the Type.
19. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.
20. If the key field for the window is a numeric field, clear the Constant value and click Add to add a blank string to the calculation.
21. Click Fields and select the Table that contains the Key value for the window. Select the Field that contains the Key value. Click Add.
22. Select the Constants tab and select Integer as the type.
23. If the key field for the window is a string field, clear the Value field and click Add to add a zero to the calculation.
24. Enter the number of the field in to the Value field and click Add.
25. Click OK to save the calculated field.
26. Drag the calculated field on to the report.
27. Close the Report Layout window. Click Save.
28. Click OK to close the Report Definition window.
29. Select File >> Microsoft Dynamics to return to Microsoft Dynamics GP.



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

Adding Extender Window (with multiple keys) fields to a Microsoft Dynamics GP report

The process for adding fields from an Extender window with multiple keys is slightly different from a window with a single key.

To add an Extender Window (with multiple keys) field to a Microsoft Dynamics GP report:

1. Select Tools >> Customize >> Report Writer.
2. Select Microsoft Dynamics GP as the Product and click OK.
3. Click Reports to open the Report Writer window.
4. Select the report that you want to modify from the Original Reports list.
5. Click Insert to move the report from the Original Reports list to the Modified Reports list.
6. Select the Report in the Modified Reports list.
7. Click Open to open the Report Definition window.
8. Click the Layout window to open the Report Layout window.
9. If the Toolbox window is not already open, select Layout >> Toolbox to open it.
10. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
11. Enter a Name for the calculated field that will become your key.
12. Select the Result Type as String.



You need to ensure that you have the key fields in the same order they appear in the Extender Window.

13. If one of your key fields is a numeric field you will need to select the Functions tab and select LNG_STR from the Function list to convert it to a string value. If you do not have any numeric key fields, skip to number 16.
14. Click Add to add the function to the expression string.
15. Click Fields and select the Table that contains the first Key value for the window. Select the Field that contains the Key value. Click Add to add to the expression string.
16. Between each field in your key you will need to use the CAT operator to concatenate each of the key fields. Click CAT under the Operators section before adding the next field to the expression.
17. If one of your key fields is a string you will need to select the Functions tab and select STRIP from the Function list to remove the trailing spaces.

18. Click Add to add the function to the expression string
19. Click Fields and select the Table that contains the Key value(s) for the window. Select the Field that contains the Key value. Click Add to add to the expression string.
20. Repeat steps 16-19 for each string key field.
21. You will now have a concatenated key field that you can use in the upcoming section. An example of how the finished expression may look is shown below:

Key Calculated Field

LNG_STR(SOP_LINE_WORK.Line Item Sequence) # STRIP(SOP_HDR_WORK.SOP Number)

22. Select Calculated Fields from the Resources list and click New to open the Calculated Field Definition window.
23. Enter a Name for the calculated field.
24. Select the Result Type as String.
25. Select the Functions tab and select the User-Defined option.
26. Select System from the Core list and rw_TableHeaderString from the Function list.



The rw_TableHeaderString function has five parameters: Product ID, Window ID, String Key Value, Numeric Key Value, and Field Number

27. Click Add to add the function to the expression string.
28. Select the Constants tab and select Integer as the Type.
29. Enter 3107 as the Constant value and click Add to add it to the expression string. 3107 is the Product ID for Extender.
30. Select String as the Type.
31. Enter the Window ID for the Extender Window as the Constant value and click Add to add it to the expression string.
32. If the key field for the window is a numeric field, clear the Constant value and click Add to add a blank string to the calculation.
33. Click Fields and select Calculated Fields under Resources. Select the Field that contains the concatenated Key value. Click Add to add to the expression string.
34. Select the Constants tab and select Integer as the type.
35. If the key field for the window is a string field, clear the Value field and click Add to add a zero to the calculation.
36. Enter the number of the field in to the Value field and click Add.

37. An example of how the finished expression may look is shown below:

Extender Field 1

FUNCTION_SCRIPT(rw_TableHeaderString 3107 "EXTRA_SOP_INFO" myKeyField 0 1)

Extender Field 2

FUNCTION_SCRIPT(rw_TableHeaderString 3107 "EXTRA_SOP_INFO" myKeyField 0 2)

38. Click OK to save the calculated field.

39. Drag the calculated field on to the report.



If you have a report that is using line item sequence numbers you will need to drag the line item sequence field onto the report and make it invisible.

40. Close the Report Layout window. Click Save.

41. Click OK to close the Report Definition window.

42. Select File >> Microsoft Dynamics GP to return to Microsoft Dynamics GP.



You will need to set security to the modified report before you will be able to view. Refer to the Microsoft Dynamics GP documentation for more information on setting security to modified reports.