APPENDIX B: LAB ANSWERS AND SOLUTIONS

Lab 2.1 – Setting Window Options

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to set options for a window to determine the window's appearance and the controls used by the window. For this exercise, change the title of a window, remove its resize controls, and remove the control area on the window.

Solution

1. From the Microsoft Dynamics GP™ application navigate to the User Class Setup window. (TOOLS→SETUP→SYSTEM→USER CLASSES)
2. When the User Class Setup window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the User Class Setup window from the Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Click **New** to open the "Select a form to modify" window.*
- *Select SY_User_Class from the forms list and click **OK**.*
- *When the Form Definition appears, highlight the SY_User_Class window and click **Open**.*

---

3. When the window layout appears, click the perimeter of the window and move the pointer to the Properties window.
4. Select the **Object** tab and make the following changes:

Title	Department Groups
Resizable	False

5. Select the **Visual** tab and make the following changes:

Control Area	False

6. Select Preview from the Layout menu to view your modifications.
7. Close the preview window using the X in the corner.

8. Close the Window Layout, and save the changes to this window.
9. From the File menu, select Microsoft Dynamics GP to return to the application. Navigate to the Security window, and make the following selections to set access to the modified window:
   TOOLS→SETUP→SYSTEM→SECURITY

User ID	Select the current user ID
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	System

10. Double-click **Department Groups** to set access to this modified window, and click **OK** to close the security window.
11. Open the customized window to view it.
    (TOOLS→SETUP→SYSTEM→USER CLASSES)

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Lab 2.2 – Changing the Opening Position of a Window

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to change the opening position of a window.

Solution

1. From the Microsoft Dynamics GP application, navigate to the Company Addresses Setup window by first opening the Company Setup Window. (TOOLS→SETUP→COMPANY→COMPANY)
2. When the Company Setup window opens, click the **Address** button to open the Company Addresses Setup window.
3. When the Company Addresses Setup window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the Company Addresses Setup window from the Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Click New to open the "Select a form to modify" window.*
- *Select SY_Company_Location from the forms list and click OK.*
- *When the Form Definition appears, highlight the SY_Company_Location window and click Open.*

---

4. From the Layout menu, select Position Window.
5. Drag the window so it appears in the lower right hand corner, and click the **OK** button to close the Position Window screen.
6. Select Preview from the Layout menu to view your modifications.
7. Close the preview window using the X in the corner.
8. Close the Window Layout, and save the changes to this window.

9. From the File menu, select Microsoft Dynamics GP to return to the application. Navigate to the Security window, and make the following selections to set access to the modified window:

   (TOOLS→SETUP→SYSTEM→SECURITY)

User ID	Select the current user ID (Lessonuser1)
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Company

10. Double-click the Company Addresses Setup selection to set access to this modified window, and click **OK** to close the security window.
11. Open the customized window to view it.

    (TOOLS→SETUP→COMPANY→COMPANY)
12. When the Company Setup window opens, click the **Address** button to open the Company Address Setup window.

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Lab 3.1 – Modifying Individual Window Prompts

Company: Fabrikam, Inc.

Scenario: This exercise goes through the process of changing several prompts in the Company Setup Window's layout, as well as repositioning prompts and changing their color, font, and style.

Solution

1. From the Microsoft Dynamics GP application, navigate to the Company Setup window. (TOOLS→SETUP→COMPANY→COMPANY)
2. When the Company Setup window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the Company Setup window from Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Click **New** to open the "Select a form to modify" window.*
- *Select SY_Company_Options from the forms list, and click **OK**.*
- *When the Form Definition appears, highlight the SY_Company_Options window, and click the **Open** button..*

---

3. With the layout of the window open, select the Static Text tool from the Toolbox. Move your cursor to the User Defined 1 text prompt and highlight it. Change the text to Category 1. Highlight the User Defined 2 text prompt, and change it to Category 2.

4. Move the cursor back to the Toolbox to de-select the static text tool. Highlight both text prompts. This can be accomplished by multi-selecting fields by holding down the control key as you select them. With both text prompts selected, move the cursor to the properties window. Change the following properties:

   FontBold = True

   FontColor = Pink

5. Select Preview on the Layout menu to view your modifications.
6. Close the preview window using the X in the corner.
7. Close the Window Layout, and save the changes to this window. Return to Microsoft Dynamics GP by selecting Microsoft Dynamics GP from the File menu. Set access to the new modified form using the Security window. (TOOLS→SETUP→SYSTEM→SECURITY)

User ID	Select the current user ID (Lessonuser1)
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Company

8. Double-click the **Company Setup** selection to set access to this modified window, and click **OK** to close the security window.
9. Open the customized window to view it. (TOOLS→SETUP→COMPANY→ COMPANY)

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Lab 3.2 – Modifying Field Displays

Company: Fabrikam, Inc.

Scenario: This lesson goes through the process of modifying a window by changing how fields display information in the window. You have determined that the information displayed in the Company Addresses window is important for your data entry personnel to view, but you do not want to allow them to change certain information displayed for your company's multiple locations.

Solution

1. From the Microsoft Dynamics GP, navigate to the Company Addresses Setup window by first opening the Company Setup Window. (TOOLS→SETUP→COMPANY→COMPANY)
2. When the Company Setup window opens, click the **Address** button to open the Company Addresses Setup window.
3. When the Company Addresses Setup window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the Company Addresses Setup window from the Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Select **New** to open the "Select a form to modify" window.*
- *Select SY_Company_Location from the forms list and click **OK**.*
- *When the Form Definition appears, highlight the SY_Company_Location window and click **Open**.*

---

4. Because you do not want certain users to have the ability to change or delete information in this window, select the following fields and assign the properties as indicated:

Contact	State	Phone 1	Save Button
Address 1	Zip Code	Phone 2	Delete Button
Address 2	County	Phone 3	
City	Country Code	Fax	

HINT: *Multiple fields can be selected at the same time by pressing the shift key and selecting all of the fields you want to change. Once all of the fields are selected, use the Properties window to change or set the properties.*

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5. Using the Properties window to set the following properties.

Editable: False
TabStop: False

Your window should look as follows:

6. Select Preview on the Layout menu to view your modifications.
7. Close the preview window using the X in the corner.
8. Close the Window Layout and save the changes to this window.

NOTE: *If you had not already done it in a previous exercise, in order to view your changes, you would need to set access to this modified window and open it.*

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9. From the File menu, select Microsoft Dynamics GP to return to the application. Navigate to the Security window, and make the following selections to set access to the modified window:
   TOOLS→SETUP→SYSTEM→SECURITY

User ID	Select the current user ID (Lessonuser1)
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Company

10. Double-click the **Company Addresses Setup** selection to set access to this modified window, and click **OK** to close the security window.
11. Open the customized window to view it.
    (TOOLS→SETUP→COMPANY→ COMPANY)
12. When the Company Setup window opens, select the **Address** button to open the Company Address Setup window.

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Lab 3.3 – Adding Fields to a Window

Company: Fabrikam, Inc.

Scenario: This lesson goes through the process of modifying a window by adding a field from the table that is linked to the window and by adding a new field that you can use later with Visual Basic for Applications. For this lesson, you add a new string field and a field from the RM_Customer_MSTR table to the Customer Maintenance window. You also create prompts for these new fields.

Solution

1. From Microsoft Dynamics GP, navigate to the Customer Maintenance window. (CARDS→SALES→CUSTOMER)
2. When the Customer Maintenance window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the Customer Maintenance window from Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Select **New** to open the "Select a form to modify" window.*
- *Select **RM_Customer_Maintenance** from the forms list and click **OK**.*
- *When the Form Definition appears, highlight the RM_Customer_Maintenance window and click **Open**.*

---

3. Make room for the **Tax Registration Number** field. It will be placed below the **Tax Schedule ID** field.
4. One of the fields you add to the window is the Tax Registration Number. From the Toolbox, select the RM_Customer_MSTR table. Navigate to the Tax Registration Number, and drag it onto the layout placing it under the **Tax Schedule ID** field.

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5. Add static text for the **Tax Registration Number** field. Highlight the static text and change the properties:

Appearance	3D Highlight
Border	True

When complete, the window should look as follows:

6. Resize the window area so that a new field can be added below the existing fields on the form.

7. Create a new local string field to add to the window. Select Local Fields from the drop-down list in the Toolbox. Complete the Local Field Definition window using the following information:

Field Name	Email Address
Control Type	String
Keyable Length	20

8. Select **OK** to add the new local field to the list. Drag the **Email Address** field from the list to the window layout placing it at the bottom left corner of the layout.

9. Add a text prompt for the field. Using the text tool, place the pointer in the layout, and add a prompt for the field called **Email Address**. Select the text prompt, and using the Properties window, change the Visual properties of the text prompt to the following:

Appearance	3D Highlight
Border	True

10. Resize and reposition the text prompt so it aligns properly with the new field and the existing prompts. Click Link Prompt from the Tools menu to link the field to the Text Prompt. Select this option again to turn the Link Prompt option off.

11. Change the tab sequence of the window so that the cursor stops at the new fields on the window. Since the **Tax Registration Number** is a non-editable field, do not include it in the tab sequence. The **Email Address** field should come after the **User Defined 2** field. To set the tab sequence on the window, select Set Tab Sequence from the Layout menu. Press the tab key until you reach the **Comment 1** field. Double-click the Email Address so it gets included in the tab sequence before the **Comment 1** field. Then hit the tab key to accept it, and the cursor will go to the **Comment 1** field. Turn the tab sequence off by de-selecting it from the Layout menu.

12. Select Preview from the Layout menu to view your modifications.

13. Close the preview window by clicking the X in the corner.

14. Close the Window Layout, and save the changes to this window.

15. From the File menu select Microsoft Dynamics GP. Navigate to the Security window, and make the following selections to set access to the modified window: (TOOLS→SETUP→SYSTEM→SECURITY)

User ID	Select the current user ID
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Sales

16. Double-click the **Customer Maintenance** selection to set access to this modified window, and click **OK** to close the security window.

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17. Open the customized window to view it.
    (CARDS→SALES→CUSTOMER)

Lab 3.4 – Adding Fields to a Scrolling Window

Company: Fabrikam, Inc.

Scenario: This lesson goes through the process of modifying a window by adding a field from the table that is linked to the scrolling window. For this lesson, you add a **Comment** field from the IVC_HDR_WORK table to the Invoicing Document Inquiry window. You add the field to the Big Line Item section of the scrolling window. You also create a text prompt for this field.

Solution

1. From Microsoft Dynamics GP, navigate to the Invoicing Document Inquiry window. (INQUIRY→SALES→INVOICE)
2. When the Invoice Document Inquiry window opens, select to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)

HINT: *You can also navigate to the Invoicing Document Inquiry window from Modifier.*

- *Click the **Forms** button to open the Modified Forms window.*
- *Click **New** to open the "Select a form to modify" window.*
- *Select IVC_Transaction_Inquiry from the forms list and click **OK**.*
- *When the Form Definition appears, highlight the IVC_Transaction_Inquiry window and click **Open**.*

---

3. Once the layout of the IVC_Transaction_Inquiry window is displayed within Modifier, open the layout of the scrolling window by double-clicking on it.
4. Using the Big Line Item selection under the Tools menu, make the big line item section area larger so the **Comment** field can be added. (TOOLS→MARK BIG LINE ITEM)

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5. Select the IVC_HDR_WORK table from the Toolbox, and add the **Comment** field to the big line item area of the scrolling window. Place it below the other fields on the window.

6. Select the appropriate properties for the **Comment** field so the color matches the other fields in the big line item area.

BackColor	Yellow
Border	False
Pattern	75% Shading
Size-Width	580

7. From the Toolbox, select the Line Tool, and draw a horizontal line under the **Comment** field. The big line item area should look as follows:

8. Close the layout of the scrolling window, and when prompted to save, discard, or cancel your changes, click **Save**.

9. Resize the window to make room for the additional text prompt for the scrolling window. Move the scrolling window and the status area down. Select the Static Text tool from the Toolbox, and add a text prompt above the scrolling window identifying the **Comment** field that has been added. Select the following properties for the Text Prompt:

BackColor	System-List Header 2
Border	True
Size-Width	596

10. Select Preview from the Layout menu to view the modifications.
11. Close the preview window by clicking the X in the corner.
12. Close the Window Layout and save the changes to this window.
13. From the File menu select Microsoft Dynamics™ GP. Navigate to the Security window, and make the following selections to set access to the modified window: (TOOLS→SETUP→SYSTEM→SECURITY)

User ID	Select the current user ID (Lessonuser1)
Company	Fabrikam, Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Sales

14. Double-click the **Invoicing Document Inquiry** selection to set access to this modified window, and click **OK** to close the security window.
15. Open the customized window to view it. (INQUIRY→SALES→INVOICE)

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Lab 4.1 – Changing Data Formats

Company: Fabrikam, Inc.

Scenario: This lesson shows you how to change keyable lengths for data entry fields in Microsoft Dynamics GP and change the format the data type uses. For this lesson, your business only uses phone numbers that are ten digits in length, without an extension. Shorten the keyable length of phone number fields by changing the Phone_Number data type.

Solution

1. From Modifier navigate to the Phone_Number data type and click the **Open** button. Change the keyable length to 10, which only allows the user to enter ten characters.

2. Click the buttons next to the attached Phone_Number format to open the Format Lookup window.
3. With the Phone_Number format highlighted, click the **Open** button to open the Format Definition window.
4. The format for this data type lists spaces rather than the zero if no phone number is displayed. The format will be numeric. Change the appropriate options:

Fill	Space
String Options	Numeric Only

5. Select the existing format from the Format Strings list. Modify it by taking off the extension. Click the **Insert** button to add the new format to the Format Strings column. Remove the format with the extension if it still exists in the list. This can be accomplished by highlighting the one with the extension and clicking the **Remove** button.

   Format String (XXX) XXX-XXXX

6. Click **OK** to save the changes to this format, and close the Format Definition window.
7. Click **OK** to close the Format Lookup window.
8. Click **OK** to close the Data Type Definition window.

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9. Validate your changes by viewing The Company Setup window within Microsoft Dynamics GP. From the File menu click **Microsoft Dynamics GP** to return to the application. Select TOOLS→SETUP→COMPANY→COMPANY to open the Company Setup window. The phone number fields should look as follows:

Lab 4.2 – Modifying Push Button Data Types

Company: Fabrikam, Inc.

Scenario: This lesson shows you how to change a push button data type by changing the name of a push button globally. An accelerator key will also be added to the button.

Solution

1. Within Modifier, click **Data Types** to open the Data Types window. Select the **PB_OK** data type, and click **Open** to open the Data Type Definition window.
2. Click the **Static Values Lookup** button. Change this button's Up caption, from "OK" to "&Accept." An ampersand is used by to indicate a keyboard equivalent or shortcut for a push button. With the ampersand appearing before the "A" in "Accept," the ALT+A button can be used to select this button.

3. Click **OK** to return to the Data Type Definition window. Click **OK** to close the Data Type Definition window.

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4. Validate the changes by viewing a window within Microsoft Dynamics GP such as the Company Setup window. From the File menu click Microsoft Dynamics GP. Navigate to the Company Setup window (TOOLS→SETUP→ COMPANY→COMPANY). The Company Setup window opens. Notice that the **Accept** button has replaced the **OK** button, and an underscore appears beneath the letter "A," indicating that the ALT + A key combination selects the button.

Lab 4.3 – Changing Strings in Microsoft Dynamics GP

Company: Fabrikam, Inc.

Scenario: This lesson goes through the process of changing text strings throughout Microsoft Dynamics GP. For this lesson, changing one global string alters all occurrences of that string throughout the dictionary.

Solution

1. Within the Microsoft Dynamics GP Modifier, select Strings from the Resources menu.
2. When the Strings window appears, select Purchasing as the Core.
3. Highlight the ZIP Code selection in the strings list, and then click the **Open** button. When the String Definition window appears, replace ZIP Code with the Postal code.

4. Click **OK** to save the changes to the string.

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5. Validate your changes by viewing a window within Microsoft Dynamics GP such as the Company Setup window. From the File menu select Microsoft Dynamics GP. Navigate to the Company Setup window (TOOLS→SETUP→ COMPANY→COMPANY). Since the change to the string is global and can be viewed in any company you use, you do not need to set access to view the changes. Postal code now appear where ZIP Code appeared before.

Lab 6.1 – Disabling Fields

Company: Fabrikam, Inc

Scenario: This exercise shows you how to use VBA code to disable a push button on a Microsoft Dynamics GP window. When a transaction is entered on the Payables Transaction Entry window, it has been decided that it should always be included as part of a batch. To eliminate confusion for the user, the **Post** button should be disabled on the window.

Solution

1. Within Microsoft Dynamics GP, navigate to the Payables Transaction Entry window. (TRANSACTIONS→PURCHASING→TRANSACTION ENTRY)
2. With the Payables Transaction Entry window open, add the window to the VBA project by selecting (TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC).
3. After the window has been added to the VBA project, the field you want to disable can be added. Add the field to the VBA project by clicking TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. Once this option is turned on, click the **Post** button to add it to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Payables Transaction Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since you want to disable the button at all times, this code would best be placed on a Window Event. Select Window from the drop-down list, and then select the Before Open Event.
7. Write the following code in the Window_BeforeOpen event:

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HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Payables Transaction Entry window is open in Microsoft Dynamics GP, close it, and reopen the window again. The BeforeOpen event code should run, and the **Post** button should now be disabled. (TRANSACTIONS→PURCHASING→TRANSACTION ENTRY)

Lab 6.2 – Locking Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to lock a field on a Microsoft Dynamics GP window. This exercise works with the Receivables Transaction Entry window. When the user selects a Debit or Credit Memo, the **Document Date** field populates with the current date. This date must be used for the transaction. Therefore you do not want to allow the user to enter the **Document Date** field to change it.

Solution

1. Within Microsoft Dynamics GP, navigate to the Receivables Transaction Entry window. (TRANSACTIONS→SALES→TRANSACTION ENTRY)
2. With the Receivables Transaction Entry window open, add the window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields you want to work with can be added. Add the fields to the VBA project by clicking TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is turned on, click the **Document Type** field and the **Document Date** field to add them to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Receivables Transaction Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since we want to lock the field only for a credit or debit memo, the code is placed behind the **Document Type** field. Select DocumentType from the drop-down list, and then select the Changed event.
7. Write the following code in the DocumentType_Changed event:

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HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Locked property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Receivables Transaction Entry window is open in Microsoft Dynamics GP, select the Debit Memos or the Credit Memo option from the Document Type drop-down list. Since the value of those choices equals 2 or 6, the code behind the changed event runs locking the **Document Date** field so the user cannot change it. (TRANSACTIONS→SALES→TRANSACTION ENTRY)

NOTE: *The Changed event was used in this exercise to ensure that every time the* ***Document Type*** *field is changed, the code fires. The else statement set the locked property to false if Debit Memos and Credit Memo is not the option selected.*

Lab 6.3 – Setting Required Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to set a field on a Microsoft Dynamics GP window to be a required field using VBA code. This exercise works with the Invoice Entry window. The user must enter a value into the **Freight** field before the record can be saved or the window can be closed.

Solution

1. Within Microsoft Dynamics GP, navigate to the Invoice Entry window. (TRANSACTIONS→SALES→INVOICE ENTRY)
2. With the Invoice Entry window open, add the window to the VBA project. (TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC).
3. After the window has been added to the VBA project, the field we want to work with can be added. Add the field to the VBA project (TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC). After this option is turned on, click the **Freight** field to add it to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Invoice Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since you want the **Freight** field to always be a required field, use a window event. Select Window from the drop-down list, and then select the BeforeOpen event.
7. Write the following code in the Window_BeforeOpen event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

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8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Invoice Entry window is open in Microsoft Dynamics GP, close it and reopen the window again. The BeforeOpen event code runs, and the **Freight** field should now be required. (TRANSACTIONS→SALES→INVOICE ENTRY)

NOTE: *To view the required fields, turn this option on within Microsoft Dynamics GP. To accomplish this, select "Show Required Fields" from the Help menu.*

Lab 6.4 – Conditionally Disabling Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to disable a button on a Microsoft Dynamics GP window if a specific condition is met. This exercise works with the Invoice Entry window. If the total of a transaction is greater than $10,000, the **Post** button should be disabled. This ensures that the transaction is approved as part of a batch prior to its posting.

Solution

1. Within Microsoft Dynamics GP, navigate to the Invoice Entry window. (TRANSACTIONS→SALES→INVOICE ENTRY)
2. If you completed the last exercise, the Invoice Entry window is already part of the VBA project. If not, add the Microsoft Dynamics GP window to the VBA project by selecting (TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC).
3. After the window has been added to the VBA project, the fields we want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is turned on, click the **Post** button and the **Total** field to add them to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Invoice Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since we want to disable the **Post** button if the total amount is greater than $10,000 use the changed event for the Total field. Select Total from the drop-down list, and then choose the Changed Event.
7. Write the following code in the Total_Changed event:

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HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

NOTE: *Since all field values returned to VBA are string values, numeric calculations may require you to convert he string value to the appropriate data type prior to performing the calculation. This example is using the CCUR() function to change the value to a currency value.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Invoice Entry window is not open in Microsoft Dynamics GP, it can be opened by selecting TRANSACTIONS→SALES→INVOICE ENTRY. After the window is open, add a record and add some line items. When the Total reaches more than $10,000 the **Post** button should be disabled.

Lab 6.5 – Opening Lookup Windows

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to open a Lookup window from a Microsoft Dynamics GP window if a specific field is empty. This exercise works with the Purchase Order Entry window. When a user moves to the **Vendor ID** field and it is empty, the Vendor Lookup window should automatically open so that a vendor can be selected from the existing list.

Solution

1. Within Microsoft Dynamics GP, navigate to the Purchase Order Entry window. (TRANSACTIONS→PURCHASING→PURCH. ORDER ENTRY)
2. With the Purchase Order Entry window open, add the window to the VBA project by selecting (TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC).
3. After the window has been added to the VBA project, the fields you want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected, click the **Vendor ID** field and the Lookup button next to the **Vendor ID** field to add them to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Purchase Order Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since you want to open the Lookup window for the user if the Vendor ID is empty, use the BeforeGotFocus event for the **Vendor ID** field. Select VendorID from the drop-down list, and then select the BeforeGotFocus Event.
7. Write the following code in the VendorID_BeforeGotFocus event:

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HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Purchase Order Entry window is not open in Microsoft Dynamics GP, it can be opened by selecting TRANSACTIONS→PURCHASING→ PURCH. ORDER ENTRY. Tab through the fields in the window until you reach the **Vendor ID** field. The Vendor ID Lookup window automatically opens since the value of the **Vendor ID** field is blank.

Lab 6.6 – Changing Dialog Messages

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to change a Dialog Message on a Microsoft Dynamics GP window. This exercise works with the Customer Maintenance window. If the user tries to delete a record from the Customer Maintenance window and the title of that window has been changed to "Patient Maintenance," the dialog message that is displayed should refer to deleting patient records instead of customer records.

Solution

1. Within Microsoft Dynamics GP, navigate to the Customer Maintenance window. (CARDS→SALES→CUSTOMERS)
2. Add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the resources have been added, switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
4. Open the appropriate code window by double-clicking on the Customer Maintenance window in the Project Explorer window in VBA.
5. To complete or test this project, the title of the Customer Maintenance window needs to be changed to display Patient Maintenance. Modifier or VBA can be used to accomplish this task. Use VBA to simplify the project. Within VBA, open the Properties window if not already displayed (VIEW→PROPERTIES WINDOW). Double-click on the Caption property to change the title of the window to display "**.**Patient Maintenance**.**" Make sure to include the period before and after the text of the caption so the user knows the window was a Modified window and is also part of a VBA project.

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6. With the code window open, select the drop-down to list the resources added to the project. Modal Dialog messages are not actual windows you can add to the project. However, the BeforeModalDialog event has special parameters available such as the PromptString parameter. You need to trap for the specific prompt string that appears in the Modal Dialog message. Select Window from the drop-down list, and then select the BeforeModalDialog Event.

7. Write the following code in the Window_BeforeModalDialog event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. With the Customer Maintenance window open, verify the new title displays ".Patient Maintenance." Use the browse buttons to navigate a record. If you try to delete that record, the modal dialog should now recognize that the title is Patient Maintenance and change the dialog message to ask them if they want to delete the patient record.

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Lab 6.7 – Restricting Data in Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to restrict the user from entering a specific value into a field on a Microsoft Dynamics GP window. This exercise works with the Receivables Transaction Entry window. This exercise restricts the user from entering C.O.D. in the **Payment Terms** field.

Solution

1. Within Microsoft Dynamics GP, navigate to the Receivables Transaction Entry window. (TRANSACTIONS→SALES→TRANSACTION ENTRY)
2. If you completed the earlier exercise (Locking Fields Using VBA Code), the Receivables Transaction Entry window already exists in the VBA project. If you did not complete the earlier project, you need to add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the field you want to work with can be added. Add the field to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is turned on, click the **Payment Terms** field to add it to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Receivables Transaction Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since we want to restrict the user from entering C.O.D. in the **Payment Terms** field, this code is placed on the BeforeUserChanged event for the **Payment Terms** field. You will give them a warning message as well as keep the user in the **Payment Terms** field and stop any other Microsoft Dynamics GP code from running. Select PaymentTerms from the drop-down list, and then choose the BeforeUserChanged Event.

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7. Write the following code in the PaymentTerms_BeforeUserChanged event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

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10. You should be logged in as lessonuser1. With the Receivables Transaction Entry window open, tab through the fields and enter data. When you reach the **Payment Terms** field, enter C.O.D**.** The message box displays a message that you cannot use C.O.D. Your focus should stay in that field and Microsoft Dynamics GP code should not have executed.

Lab 6.8 – Setting Drop-Down Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to set the value of a drop-down field on a Microsoft Dynamics GP window. This exercise works with the Purchase Order Entry window. Set the default of the **Type** field to display Drop Ship.

Solution

1. Within Microsoft Dynamics GP, navigate to the Purchase Order Entry window. (TRANSACTIONS→PURCHASING→PURCH. ORDER ENTRY)
2. If you completed the earlier exercise (Opening Lookup Windows Using VBA Code), the Purchase Order Entry window already exists in the VBA project. If you did not complete the earlier project, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the field you want to work with can be added. Add the field to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is turned on, click the **Type** field to add it to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Purchase Order Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since you want the Type field to default to Drop-Ship, this code must be placed on the BeforeOpen event for the Window. Select Window from the drop-down list, and then select the BeforeOpen Event.
7. Write the following code in the Window_BeforeOpen event:

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HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

NOTE: *"Type" is a reserved word in VBA in addition to being a field on the Purchase Order Entry window. To correctly identify the field in your VBA code, you need to fully qualify the field by using it in conjunction with its window name.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. If the Purchase Order Entry window is open, close it and reopen it so the Window event runs. You should now see the **Type** field default to Drop Ship.

Lab 6.9 – Calculating and Setting Field Values

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to calculate a percentage and set the value of a field on a Microsoft Dynamics GP window. This exercise works with the Receivables Transaction Entry window. If the Sales Amount is less than $50, the Freight should automatically calculate as 10% of the Sales Amount. If it is $50 or greater, the Freight should simply default as $5.

Solution

1. Within Microsoft Dynamics GP, navigate to the Receivables Transaction Entry window. (TRANSACTIONS→SALES→TRANSACTION ENTRY)
2. If you completed one of the earlier exercises working with the Receivables Transaction Entry window, it already exists in the VBA project. If you did not complete the earlier project, you need to add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields you want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is turned on, click the **Sales Amount** field and the **Freight** field, and add them to the VBA Project.
4. Switch to the VBA Editor. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the Receivables Transaction Entry window in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since we want the calculation to occur when the Sales Amount changes, this code is placed on the AfterUserChanged event for the Sales Amount field. Select SalesAmount from the drop-down list, and then select the AfterUserChanged Event.

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7. Write the following code::

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property you want to use such as the Enabled property. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→ COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. In the Receivables Transaction Entry window, tab to the **Sales Amount** field and enter a value. Notice if the value is less than $50, then the Freight calculates the percentage. If it is more than $50, the **Freight** field should display $5.

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Lab 7.1 – Setting Field Values in a Grid

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to set a default value for a field in a Grid. This exercise works with the GL Transaction Entry window. When the user enters the Grid, the **Distribution Reference** field in the Grid should default to a value that is the combination of the Journal Entry Number and the transaction's Reference.

Solution

1. Within Microsoft Dynamics GP, navigate to the GL Transaction Entry window. (TRANSACTIONS→FINANCIAL→GENERAL)
2. Add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields you want to work with can be added. Expand the scrolling window so all detail information is showing. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected click the following fields:
   - **Journal Entry** field
   - **Reference** field
   - **Distribution Reference** field in the Grid (When you click on this field, the name that appears in the VBA code window is Description. The picture below illustrates the scrolling window opened with Modifier so you can see the actual field names in the scrolling window.)

4. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking on the GL Transaction Entry Detail grid in the Project Explorer window in VBA.

6. With the code window open, select the drop-down to list the resources added to the project. Since you want to set the value of the **Distribution Reference** (**Description**) field as the user enters the Grid, this code is placed on the BeforeLineGotFocus event for the Grid. Select Grid from the drop-down list, and then select the BeforeLineGotFocus Event. The value of the **Distribution Reference** (**Description**) field is set to a combination of the **Journal Entry** field and the **Reference** field.

7. Write the following code in the Grid_BeforeLineGotFocus event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appear. Then select the property or method to use such as the focus method. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by selecting the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

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10. In the GL Transaction Entry window tab to the **Reference** field and enter a value. Once you tab to the Grid, the event should run and populate the **Distribution Reference** (**Description**) field with the new value.

Lab 7.2 – Restricting Data in Grid Fields

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to restrict users from entering specific information into a field in a Grid for a Microsoft Dynamics GP window. This exercise works with the Invoice Entry window. If the line item's U of M is "Case," a message should be given indicating that they are not authorized to specify a unit of measure of that type. Focus should be set back to that field so another value can be entered.

Solution

1. Within Microsoft Dynamics GP, navigate to the Invoice Entry window. (TRANSACTIONS→SALES→INVOICE ENTRY)
2. If you did not add the Invoice Entry window to the VBA exercise in a previous lesson, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the field you want to work with can be added. The Grid must be active before a field can be added. Select the first record using the browse buttons so that the grid is active. Add the field to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected click the following fields:
   – **U of M** field

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4. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR)
5. Open the appropriate code window by double-clicking on the Invoice Entry Detail grid in the Project Explorer window in VBA.
6. With the code window open, select the drop-down to list the resources added to the project. Since you want to check the information the user entered into the **U of M** field and you want to keep them there if they entered "Case," this code is placed on the BeforeUserChanged event for the **U of M** field. Select **UofM** from the drop-down list, and then select the BeforeUserChanged Event. If the user is logged in as lessonuser1, do not populate the grid with customers that are in the USA.
7. Write the following code in the UofM_BeforeUserChanged event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appear. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

8. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)
9. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by selecting the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

10. Add some line items in the Invoice Entry window. If the user enters "Case" in the **Unit of Measure** field, the message appears telling them they cannot enter Case. The code stays in the field so the user can enter something else.

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Lab 7.3 – Setting Field Values on Different Lines in a Grid

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to use VBA code to set a default value for a field in a Grid from a different line item. This exercise works with the GL Transaction Entry window. When the user enters the Grid, the account number should default to the account number that was entered for the previous line of the scrolling window. For example, as focus moves to the second line in the grid, the account number should automatically be set to the account number that was entered for the first line item.

Solution

1. Within Microsoft Dynamics GP, navigate to the GL Transaction Entry window. (TRANSACTIONS→FINANCIAL→GENERAL)
2. If you have not added the window in a previous exercise, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields you want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. Once this option is selected click the **Account Number** field.

4. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR)
5. Open the appropriate code window by double-clicking on the GL Transaction Entry Detail grid in the Project Explorer window in VBA.

6. With the code window open, select the drop-down to list the resources added to the project. Since you want to set the value of the **Account Number** field as the user tabs to a new line item, the value of the Account Number from the previous line must be stored as a variable. The code you write will exist in two different events. The value of the Account Number entered for the first line item can be saved using the AfterLineLostFocus event for the Grid. The Account Number for the second line item can be set using the AfterLineGotFocus event for the Grid.

7. Write the following code in the General Declarations section to declare the variable:

8. Write the following code in the Grid_AfterLineLostFocus event:

9. Write the following code in the Grid_AfterLineGotFocus event:

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Then select the property or method to use. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

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10. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

11. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by selecting the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

12. In the GL Transaction Entry window, tab to the grid, and enter a line item. Select an account number and fill out the rest of the information for that record. When you tab to the next line item, the event should run and populate the Account Number with the same Account Number that was used on the previous line.

Lab 8.1 – Adding Fields to a Microsoft Dynamics GP Window Using Modifier

Company: Fabrikam, Inc.

Scenario: In this exercise, two new local fields will be added to a Microsoft Dynamics GP window using Modifier. Once the fields have been added, VBA code can be used in the following exercises to store, retrieve, delete, and update information in the DUOS table. This exercise works with the Vendor Maintenance window.

Solution

1. From the Microsoft Dynamics GP application, navigate to the Vendor Maintenance window by clicking CARDS→PURCHASING→VENDOR.
2. When the Vendor Maintenance window opens, select the option to modify the current window. (TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW)
3. Modify the window layout area to add room for the additional fields. Move the status area information down so the window looks like the following illustration:

4. From the Toolbox, select Local Fields from the drop-down list, and click the **New** button to open the Local Field Definition window.

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5. Using the following information, create two new local fields.

Field Name	URL Address
Array Size	0
Data Type	Local
Control Type	String
Keyable Length	31

6. Click the **Add** button after creating the URL Address.

Field Name	General Satisfaction
Array Size	0
Data Type	Local
Control Type	Drop-Down List
Static Text Values	Excellent, Good, Average, Fair, Poor
Sort List	Unmarked

Click the **OK** button after adding the General Satisfaction field to close the Local Field Definition Window.

7. After the fields have been created, add them to the window layout.
8. Using the Static Text Tool in the Toolbox, add static text for the two new fields. Once the static text has been added, change the following properties so the underline appears on the static text:

Appearance	3D Highlight
Border	True

9. The window should look like the following when finished:

10. Link the fields to their text prompts by choosing Tools-Link Prompt. You can also set the tab sequence so the URL Address and General Satisfaction come after the Ship Date. Choose Layout-Set Tab Sequence. Tab until focus stops at the **Account Number with Vendor** Field. Double-click on the **URL Address** field, click the TAB key, then double-click on the **General Satisfaction** field. Click the tab and turn off tab sequence mode by de-selecting it from the menu.

11. Select Preview from the Layout menu to view your modifications. Close the preview window clicking the X in the corner.

12. Close the Window Layout, and save the changes to this window.

13. From the File menu, select Microsoft Dynamics GP to return to the application. Navigate to the Security window, and make the following selections to set access to the modified window: (TOOLS→SETUP→SYSTEM→SECURITY).

User ID	Select the current user ID
Company	Fabrikam Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Purchasing

14. Double-click the **Vendor Maintenance** selection to set access to this modified window, and click **OK** to close the security window.

15. Open the customized window to view it. (CARDS→PURCHASING→VENDOR)

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Lab 8.2 – Retrieving From the DUOS Table

Company: Fabrikam, Inc.

Scenario: In this exercise, the two new local fields that were added to the Microsoft Dynamics GP window are retrieved from the DUOS table whenever the corresponding Microsoft Dynamics GP record is displayed. This exercise works with the Vendor Maintenance window.

Solution

1. Within Microsoft Dynamics GP, navigate to the Vendor Maintenance window. (CARDS→PURCHASING→VENDOR)
2. Add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields we want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. Once this option is selected click on the following fields:
   - **URL Address** field
   - **General Satisfaction** field
   - **Vendor ID** field
4. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).
5. Open the appropriate code window by double-clicking the Vendor Maintenance window in the Project Explorer window in VBA.
6. With the code window open, two variables need to be declared that will be used as the Collection and the Object. These variables need to be available to all procedures within that module. The variables should be declared in the General Declaration Section of the module under the Option Explicit statement.
7. Write the following code in the General Declaration Section:

8. With the code window open select the drop-down to list the resources added to the project. Since we want to retrieve information about a specific vendor this code will be placed on the Changed event for the **Vendor ID** field. Select VendorID from the drop-down list, and then select the Changed Event.

9. Write the following code in the VendorID_Changed event:

***HINT**: If you type the resource name correctly when typing the period, a list of methods and properties appears. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

10. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

11. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

12. Since you have not created the code to "Save" the record to the DUOS table, you cannot test the code to retrieve it. Please complete all exercises regarding DUOS, and test each exercise when they are all complete.

***NOTE:** The retrieve is done before the save to determine if the record exists. If no record is found, it is treated as a new blank record.*

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Lab 8.3 – Saving From the DUOS Table

Company: Fabrikam, Inc.

Scenario: In this exercise, the two new local fields that were added to the Microsoft Dynamics GP window are saved to the DUOS table whenever the corresponding record is saved. This exercise works with the Vendor Maintenance window.

Solution

1. Within Microsoft Dynamics GP, navigate to the Vendor Maintenance window. (CARDS→PURCHASING→VENDOR)
2. If you did not add the Vendor Maintenance window to the VBA project in a previous lesson, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the fields you want to work with can be added. Add the fields to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected, click the **Save** button.
4. Remember to deal with all possible situations such as when a modal dialog asks if you want to save the record. Check to see what message appears on the Modal Dialog prompting you to save the record. This might occur if a change is made to a record and you try to close the Microsoft Dynamics GP window. It can also occur if you change a record and try to select a different vendor using the browse buttons. Make a note of the exact wording of the prompt string that you will see.

5. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR).

6. Open the appropriate code window by double-clicking the Vendor Maintenance window in the Project Explorer window in VBA.

7. With the code window open, select the drop-down to list the resources added to the project. Since you want to save information about a specific vendor, this code is placed on the BeforeUserChanged event for the **Save** button. Select Save from the drop-down list, and then select the BeforeUserChanged Event.

8. Write the following code in the Save_BeforeUserChanged event:

***HINT**: If you type the resource name correctly when typing the period, a list of methods and properties appears. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

9. Write the following code to trap for the modal dialog in the Window_AfterModalDialog event:

10. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

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11. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

12. Please complete all exercises regarding DUOS, and test each exercise when they are all complete.

Lab 8.4 – Deleting From the DUOS Table

Company: Fabrikam, Inc.

Scenario: In this exercise, the two new local fields that were added to the Microsoft Dynamics GP window are removed from the DUOS table whenever the corresponding record is deleted. This exercise works with the Vendor Maintenance window.

Solution

1. Within Microsoft Dynamics GP, navigate to the Vendor Maintenance window. (CARDS→PURCHASING→VENDOR)
2. If you did not add the Vendor Maintenance window to the VBA project in a previous lesson, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. After the window has been added to the VBA project, the field you want to work with can be added. Add the field to the VBA project by selecting TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected, click the **Delete** button.
4. Remember to deal with all possible situations such as when a modal dialog asks if you want to delete the record. Check to see what message appears on the Modal Dialog prompting you to delete the record. This modal dialog appears if you select the **Delete** button.

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5. In addition, when deleting records you also need to deal with the possibility of another window appearing in Microsoft Dynamics GP stating that the record cannot be deleted. This is an actual window that can be added to the VBA project. Add this window to the project and write code to deal with the possibility of this window opening.

6. To make this window appear, select an existing record using the browse buttons. Click the **Delete** button, and select the Delete option to delete the record. When this second window appears, add it to the VBA project by selecting the shortcut of CTRL+F11. (The menu is grayed so you need to use the keyboard equivalent.) The name of the window appears in VBA as Microsoft Dynamics GP**.**

7. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR)

8. Open the appropriate code window by double-clicking the Vendor Maintenance window in the Project Explorer window in VBA.

9. With the code window open, three variables need to be declared that will be used with this exercise, two variables need to be available to all procedures within that module, and the third variable needs to be available to the Microsoft Dynamics GP window so it needs to be defined as a Public variable. The variables should be declared in the General Declaration Section of the module under the Option Explicit statement.

10. Add the lines of code that are circled to the General Declaration Section:

```
Microsoft_Dynamics_GP - VendorMaintenance (Code)
(General)                    (Declarations)

Option Explicit
Dim VendorCollection As DUOSObjects
Dim VendorObject As DUOSObject

Dim WanttoDelete As Boolean
Dim VendorIDtoDelete As String
Public OKtoDelete As Boolean
```

11. The first thing the code needs to do is initialize the variables that were created. Since we want to delete information about a specific vendor, the code will save the current Vendor ID to the VendorIDtoDelete variable. This code will be placed on the Changed event for the Vendor ID. Select VendorID from the drop-down list, and then select the Changed Event. Since this code is running from the changed event on the **Vendor ID** field, the other two variables can be initialized as well. Add this code to the bottom of any existing code that exist for this field and event.

    Add the lines of code that are circled to the VendorID_Changed event:

```
Microsoft_Dynamics_GP - VendorMaintenance (Code)
VendorID                     Changed

Private Sub VendorID_Changed()
   Set VendorCollection = DUOSObjectsGet("Vendor Information")
   If VendorID.Empty = False Then
      Set VendorObject = VendorCollection(VendorID)
      URLAddress = VendorObject.Properties("URL Address")
      GeneralSatisfaction = VendorObject.Properties("General Satisfaction")
   End If

   If VendorID.Empty = False Then
      VendorIDtoDelete = VendorID
      OKtoDelete = True
      WanttoDelete = False
   End If
End Sub
```

***HINT**: If you type the resource name correctly when typing the period, a list of methods and properties appears. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

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12. Write the following code to trap for the modal dialog in the Window_AfterModalDialog event:

```
Microsoft_Dynamics_GP - VendorMaintenance (Code)
Window                                  AfterModalDialog

Private Sub Window_AfterModalDialog(ByVal DlgType As DialogType, _
PromptString As String, Control1String As String, Control2String As String, _
Control3String As String, Answer As DialogCtrl)
   If PromptString = "Do you want to save changes?" Then
      If Answer = dcButton1 Then
         VendorObject.Properties("URL Address") = URLAddress
         VendorObject.Properties("General Satisfaction") = GeneralSatisfaction
      End If
   End If

   If PromptString = "Are you sure you want to delete this record?" Then
      If Answer = dcButton1 Then
         WanttoDelete = True
      End If
   End If
End Sub
```

13. Write the following code in the **Delete** Button_AfterUserChanged event:

```
Microsoft_Dynamics_GP - VendorMaintenance (Code)
Delete                                  AfterUserChanged

Private Sub Delete_AfterUserChanged()
   If WanttoDelete And OKtoDelete Then
      VendorCollection.Remove (VendorIDtoDelete)
   End If
End Sub
```

14. Double-click on the Microsoft Dynamics GP window in the Project Explorer window in VBA to open the code window. Write the following code in the Microsoft_Dynamics_GP_AfterOpen event:

```
Microsoft_Dynamics_GP - MicrosoftDynamicsGP (Code)
Window                                  BeforeOpen

Private Sub Window_BeforeOpen(OpenVisible As Boolean)
   VendorMaintenance.OKtoDelete = False
End Sub
```

15. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

16. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

17. Please complete all exercises regarding DUOS, and test each exercise when they are all complete. You should be able to add, save, retrieve and delete the URL Address and General Satisfaction level for a customer.

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Lab 8.5 – Selectively Deleting Records

Company: Fabrikam, Inc.

Scenario: In this exercise, if you select the option to delete the Vendor from the Vendor Maintenance window, the record will only be deleted if the General Satisfaction level is not marked Excellent. Write a warning message stating the record cannot be deleted if the General Satisfaction level is excellent, and stop Microsoft Dynamics GP code from running and deleting the record from the Microsoft Dynamics GP table. This exercise works with the Vendor Maintenance window.

Solution

1. Within Microsoft Dynamics GP, navigate to the Vendor Maintenance window. (CARDS→PURCHASING→VENDOR)
2. If you did not add the Vendor Maintenance window to the VBA project in a previous lesson, add the Microsoft Dynamics GP window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. If you did not add the following resource in a previous project, add the following field to the VBA project by selecting TOOLS→ CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected, click the **Delete** button.
4. Switch to VBA. (TOOLS→CUSTOMIZE → VISUAL BASIC EDITOR)
5. Open the appropriate code window by double-clicking the Vendor Maintenance window in the Project Explorer window in VBA.

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6. Since you want to stop Microsoft Dynamics GP code from running and deleting the vendor if the General Satisfaction level is excellent, you should use the Keepfocus and the CancelLogic parameters. This code will be placed on the BeforeUserChanged event for the **Delete** button.

   Select Delete from the drop-down list, and then select the BeforeUserChanged Event. Write the following code in the Delete_BeforeUserChanged event:

7. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

8. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

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9. Since all exercises are now complete in the DUOS section, test each exercise.

Lab 9.1 – Adding Fields to Existing Microsoft Dynamics GP Reports

Company: Fabrikam, Inc.

Scenario: This exercise shows you how to add fields to existing Microsoft Dynamics GP reports using Report Writer. This exercise works with the Vendor List report. Since two fields were added to the Microsoft Dynamics GP Vendor Maintenance window in the previous chapter, the Vendor List report should also be modified to display those two new fields.

Solution

1. From the Microsoft Dynamics GP application, navigate to Report Writer. (TOOLS→CUSTOMIZE→REPORT WRITER)
2. Select the Microsoft Dynamics GP product and click OK.
3. Click the **Reports** button from the Toolbar to list the Microsoft Dynamics GP reports.
4. Navigate to the Vendor List report, select it, and click the **Insert** button to add it to the Modified Reports List.

5. Open the layout of the Vendor List report. Select Vendor List from the Modified Reports list, and click the **Open** button. From the Report Definition window, select the **Layout** button to modify the layout.
6. Add two calculated fields to the Vendor List report to represent the additional fields on the maintenance window. Name the fields **URL Address** and **General Satisfaction**. Select **Calculated Fields** from the drop-down list on the Toolbox.

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7. Click **New** to open the Calculated Field Definition window. Use the following information to create two new calculated fields.

Name	URL Address
Result Type	String
Expression Type	Calculated
Constants Tab	Type: String Constant: (Leave Empty)

Click the **Add** button to add the string to the Expressions Horizontal List Box. Click the **OK** button.

8. Click **New** to open the Calculated Field Definition window. Use the following information to create two new calculated fields.

Name	General Satisfaction
Result Type	String
Expression Type	Calculated
Constants Tab	Type: String Constant: (Leave Empty)

Click the **Add** button to add the string to the Expressions Horizontal List Box. Click the **OK** button.

9. Make the body section area larger by clicking the "B" and dragging it down. After creating the new fields, add them to the body section of the report.

10. Close the window layout clicking the X in the top corner. When prompted to save the changes, click the **Save** button.

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Lab 9.2 – Populating Calculated Fields in Microsoft Dynamics GP Reports

Company: Fabrikam, Inc.

Scenario: In this exercise, you need set the new calculated fields on the report to the values that were saved to the DUOS table from the modified Vendor Maintenance window. This exercise works with the Vendor List report.

Solution

1. Within Report Writer, navigate to the Vendor List report, select it and click the **Insert** button to add it to the Modified Reports List.
2. Highlight the report, and click the **Open** button to view the Report Definition window. Click the **Layout** button to open the layout for the Vendor List report.
3. Add the report to the VBA project by selecting TOOLS→ADD REPORT TO VISUAL BASIC.
4. After the report has been added to the VBA project, the fields you want to reference using VBA code can be added. Add the following fields by holding down the control key as you select them.
   - **Vendor ID** field
   - **URL Address** field
   - **General Satisfaction** field

   After they are all selected, go to TOOLS→ADD FIELDS TO VISUAL BASIC.
5. Switch to VBA. (TOOLS→VISUAL BASIC EDITOR)
6. Open the appropriate code window by double-clicking the Vendor List report in the Project Explorer window in VBA.
7. You want to populate the **URL Address** and the **General Satisfaction** fields from the information stored in the DUOS table. Since the fields are listed in the Body section of the report, this code is placed on the BeforeBody event for the Report. Select Report from the drop-down list, and then click the BeforeBody Event.

8. Since you are working with the DUOS table, you need to write code to define the DUOS objects and declare variables. In addition, you will need to return the vendor collection you want to work with.

   Next your code will return the values of the URL Address and the General Satisfaction fields from the table. Drop-down lists are always stored in Microsoft Dynamics GP tables as integer values. Since the **General Satisfaction** field is a drop-down list, it is stored in the DUOS table as 1,2,3,4, and 5 instead of Excellent, Good, Average, Fair, and Poor. When the DUOS information is placed on a report, by default it appears as stored in the table. If you would like the corresponding text values to be shown, include additional code in your VBA event to translate those values.

Microsoft_Dynamics_GP - VendorList (Code)

Report | BeforeBody

```
Option Explicit

Private Sub Report_BeforeBody(SuppressBand As Boolean)
   'Declare variables used in this code.
   Dim VendorCollection As DUOSObjects
   Dim VendorObject As DUOSObject
   Dim DDLVal As String

  'Return the Vendor Collection you want to work with.
   Set VendorCollection = DUOSObjectsGet("Vendor Information")
   Set VendorObject = VendorCollection(VendorID)

   'Return the values of the General Satisfaction field
   DDLVal = VendorObject.Properties("General Satisfaction")
   If DDLVal = "1" Then
      GeneralSatisfaction = "Excellent"
   ElseIf DDLVal = "2" Then
      GeneralSatisfaction = "Good"
   ElseIf DDLVal = "3" Then
      GeneralSatisfaction = "Average"
   ElseIf DDLVal = "4" Then
      GeneralSatisfaction = "Fair"
   ElseIf DDLVal = "5" Then
      GeneralSatisfaction = "Poor"
   End If

   'Return the values of the URL Address
   URLAddress = VendorObject.Properties("URL Address")
End Sub
```

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

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11. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE MICROSOFT_DYNAMICS_GP)

12. Test the VBA code by viewing the Microsoft Dynamics GP report. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

13. If the layout window for the Vendor List report is open, close the layout by clicking the X in the top corner. When asked to save the changes, click **Save**.

14. From the Report Writer window, select Vendor List, and click the **Print** button to test the code. Select the check box to print it to the window. The two fields should now be populated with data.

```
System:      12/27/2005  5:08:00 PM                    Fabrikam, Inc.
User Date:   4/12/2007                             VENDOR SUMMARY LIST
                                                   Payables Management

Ranges:
  Vendor ID:
  Vendor Name:
  Vendor Class:

  Vendor Status:
  1099 Type:

Sorted By:

Vendor ID       Name                            Class ID          Phone
-------------------------------------------------------------------------
  Address
-------------------------------------------------------------------------
    City                            State                          ZIP C
-------------------------------------------------------------------------
ACETRAVE0001    A Travel Company                AUS-NSW-M         (298)
  123 Riley St.
    Sydney                          NSW                            2086
      URL Address for  Ace                Excellent
```

HINT: *If you print the report in Microsoft Dynamics GP, make sure to grant access to the report using Microsoft Dynamics GP security.*

Lab 10.1 – Adding Local Fields to a Microsoft Dynamics GP Window Using Modifier

Company: Fabrikam, Inc.

Scenario: The next two exercises demonstrate how to add more fields to a Microsoft Dynamics GP window and populate them with information from another table within Microsoft Dynamics GP using ADO methods. Add data from the Item Master table (IV00101) to the Item Transaction Inquiry window.

Since SQL statements and ODBC will be used, log in as "sa" for all exercises in this section. For the first exercise, two additional fields and a push button are added to the Microsoft Dynamics GP Item Transaction Inquiry window. This is done using Modifier.

Solution

1. Within Microsoft Dynamics GP, navigate to the Item Transaction Inquiry window: INQUIRY→INVENTORY→ITEM TRANSACTION.
2. With the window, open add it to Modifier by selecting TOOLS→CUSTOMIZE→MODIFY CURRENT WINDOW.
3. Modify the window layout area to add room for the additional fields. Two new fields are added under the **Description** field, and a push button is added in the status area of the window. The window should look like the following illustration:

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4. From the Toolbox, select Local Fields from the drop-down list, and click the **New** button to open the Local Field Definition window.
5. Using the following information, create three new local fields. Click the **Add** button after creating the **Short Name** and **Standard Cost** fields. Then click the **OK** button after adding the **PB Update Standard Cost** button to close the Local Definition Window.

Field Name	Short Name
Array Size	0
Data Type	Local
Control Type	String
Keyable Length	15

Field Name	Standard Cost
Array Size	0
Data Type	Local
Control Type	Currency
Keyable Length	15
Format	DLR_RBS0_STR$

Field Name	PB Update Standard Cost
Array Size	0
Data Type	Local
Control Type	Push Button
Static Values	Text - Picture
Up Caption	Update Standard Cost

6. After the fields have been created, add them to the window layout.
7. Using the Static Text Tool in the Toolbox, add static text for the two new fields. After the static text has been added, change the following properties so the underline appears on the static text:

Appearance	3D Highlight
Border	True

8. Link the Text Prompts with their associated fields. This option is under the Tools menu.
9. Change the property for the **Short Name** field to be editable = false.

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10. The window should look like the following when finished:

11. Select Preview from the Layout menu to view your modifications Close the preview window clicking the X in the corner.
12. Close the Window Layout, and save the changes to this window.
13. From the File menu, click Microsoft Business Solutions-Dynamics GP to return to the application. Navigate to the Security window and make the following selections to set access to the modified window (TOOLS→SETUP→SYSTEM→SECURITY).

User ID	Select the current user ID
Company	Fabrikam Inc.
Product	Microsoft Dynamics GP
Type	Modified Windows
Series	Inventory

14. Double-click Item Transaction Inquiry selection to set access to the modified window, and click **OK** to close the security window.
15. Open the customized window to view it. (INQUIRY→INVENTORY→ITEM TRANSACTION)

NOTE: *For details about adding new fields to a Microsoft Dynamics GP window, refer to the "Customizing Windows" section of the Modifier Training workbook.*

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Lab 10.2 – Populating Local Fields with Data Using ADO and VBA Code

Company: Fabrikam, Inc.

Scenario: This exercise demonstrates how to populate the local fields added in the last exercise with information from another table within Microsoft Dynamics GP using ADO methods. Specifically, you must add data from the Item Master table (IV00101) to the Item Transaction Inquiry window.

Since SQL statements and ODBC will be used, log in as "sa" for all exercises in this section.

In this exercise, an example of ADO methods is used in the IV Item Transaction Inquiry window. The form is changed with Modifier to add the Short Name and Standard Cost for the item. VBA code is written to retrieve this data and display it on the Inquiry window. There is also a button to allow you to update the Standard Cost information from the Inquiry Screen. Typically, you do not have an **Update** button on an Inquiry Window. We are demonstrating this only for the purpose of showing the update functionality.

Solution

1. If the window is not open, navigate to the Modified Item Transaction Inquiry window: INQUIRY→INVENTORY→ITEM TRANSACTION.
2. Add the Modified Item Transaction Inquiry window to the VBA project by selecting TOOLS→CUSTOMIZE→ADD CURRENT WINDOW TO VISUAL BASIC.
3. Add the following fields to the VBA project by clicking TOOLS→CUSTOMIZE→ADD FIELDS TO VISUAL BASIC. After this option is selected, click the following:
   - **Item Number** field
   - **Short Name** field
   - **Standard Cost** field
   - **Update Standard Cost** button
4. Switch to VBA. (TOOLS→CUSTOMIZE→VISUAL BASIC EDITOR)
5. Open the appropriate code window by double-clicking the Item Transaction Inquiry window in the Project Explorer window in VBA.

6. A reference must be marked to the ADO library so methods and properties can be accessed. Mark a reference by selecting TOOLS→REFERENCES. Find the Microsoft Active Data Objects Library you want to use, and check it. Then click **OK**.

7. Use standard VBA syntax to declare variables used for objects from external applications. Create the objects you need using the Set statements inside the VBA procedure. The following code shows variables declared to use ADO methods in the IV Item Transaction Inquiry window. These variables are declared in the General Declaration section of the IV Item Transaction Inquiry window. Select General from the drop-down list, and then add the following code to the Declarations Event.

HINT: *If you type the resource name correctly when typing the period, a list of methods and properties appears. Type the code in lower case. When you tab off the line, VBA capitalizes and formats it appropriately. This is an easy way to visually tell if something is not recognized or typed incorrectly.*

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8. Establish a connection to the database through the ODBC data source. Only execute this once within a session, if possible. Therefore, this connection is defined in the BeforeOpen event of the Window. Select Window from the drop-down list, and then add the following code to the BeforeOpen Event.

Microsoft_Dynamics_GP - ItemTransactionInquiry (Code)

Window | BeforeOpen

```
Private Sub Window_BeforeOpen(OpenVisible As Boolean)
    With cn
        .ConnectionString = "Provider=MSDASQL; " & _
            "Data Source=Dynamics; User ID = sa; " & _
            "Password=access;Initial Catalog=TWO"
        .CursorLocation = adUseClient
        .Open
    End With
    cmd.ActiveConnection = cn
    cmd.CommandType = adCmdText
End Sub
```

HINT: *Depending on what your ODBC driver is, the Data Source in your VBA code might need to be changed.*

9. Close the ODBC connection. This connection is closed in the AfterClose event of the Window. Select Window from the drop-down list, and then add the following code to the AfterClose Event.

Microsoft_Dynamics_GP - ItemTransactionInquiry (Code)

Window | AfterClose

```
Private Sub Window_AfterClose()
    If rst.State = adStateOpen Then rst.Close
    If cn.State = adStateOpen Then cn.Close
End Sub
```

10. After defining the database connection and closing the connection, write code to retrieve the data on the screen. This code is placed in the Changed event of the Item Number. Select ItemNumber from the drop-down list, and then add the following code to the Changed event.

Microsoft_Dynamics_GP - ItemTransactionInquiry (Code)

ItemNumber | Changed

```
Private Sub ItemNumber_Changed()
    Dim Numrows As Integer
    If ItemNumber = "" Then Exit Sub
    cmd.CommandText = "SELECT * FROM IV00101 WHERE" & _
          "(ITEMNMBR='" & ItemNumber & "')"
    Set rst = cmd.Execute
    ShortName = Trim(rst!ITMSHNAM)
    StandardCost = rst!STNDCOST
End Sub
```

HINT: *A recordset created solely for reading data should be created differently for performance optimizations.*

11. A button was added to the window to update the Standard Cost information. This code is placed in the BeforeUserChanged event of the **Update Standard Cost** button. Select UpdateStandardCost from the drop-down list, and then add the following code to the BeforeUserChanged Event.

Microsoft_Dynamics_GP - ItemTransactionInquiry (Code)

UpdateStandardCost | BeforeUserChanged

```
Private Sub UpdateStandardCost_BeforeUserChanged(KeepFocus As
    If ItemNumber = "" Then Exit Sub
    sqlstring = "SELECT * FROM IV00101 WHERE " & _
          "(ITEMNMBR='" & ItemNumber & "') "
    rstupdate.Open sqlstring, cn, adOpenDynamic, _
          adLockOptimistic, adCmdText
    rstupdate!STNDCOST = CCur(StandardCost)
    rstupdate.Update
    ItemNumber.Focus
    rstupdate.Close
End Sub
```

NOTE: *For detailed information on ADO, refer to the Microsoft ActiveX Data Objects help file, ADO210.CHM, located on your hard drive. The specific location of the file may vary based upon the operating system being used.*

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12. Compile the code to verify it runs in Microsoft Dynamics GP. (DEBUG→COMPILE DYNAMICS_GP)

13. Test the VBA code by viewing the Microsoft Dynamics GP window in run mode. Switch to Microsoft Dynamics GP by clicking the **View Microsoft Dynamics GP** button from the Toolbar. You can also select Microsoft Dynamics GP from the View menu.

14. Test this exercise by navigating to the Item Transaction Inquiry window (INQUIRY→INVENTORY→ITEM TRANSACTION). Select a record using the **Browse** buttons. Change the Standard Cost and click the **Update Standard Cost** button. The new value should be saved to the table.

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