

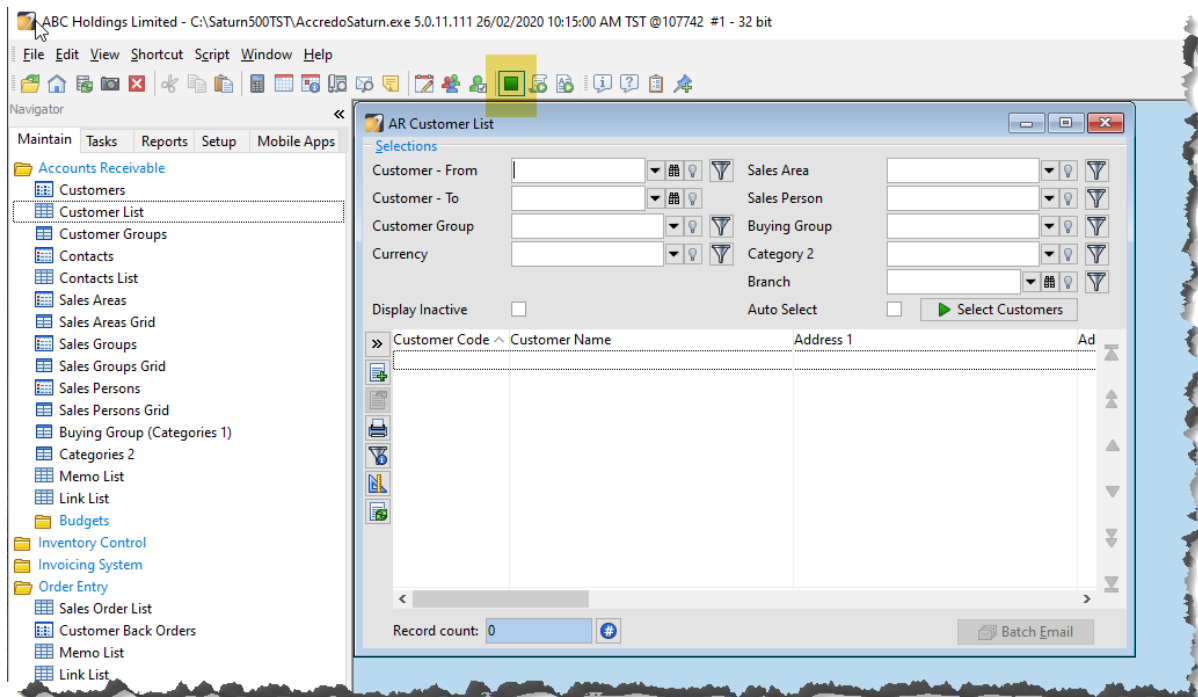


Tips & Tricks

Save Preferred List Selections

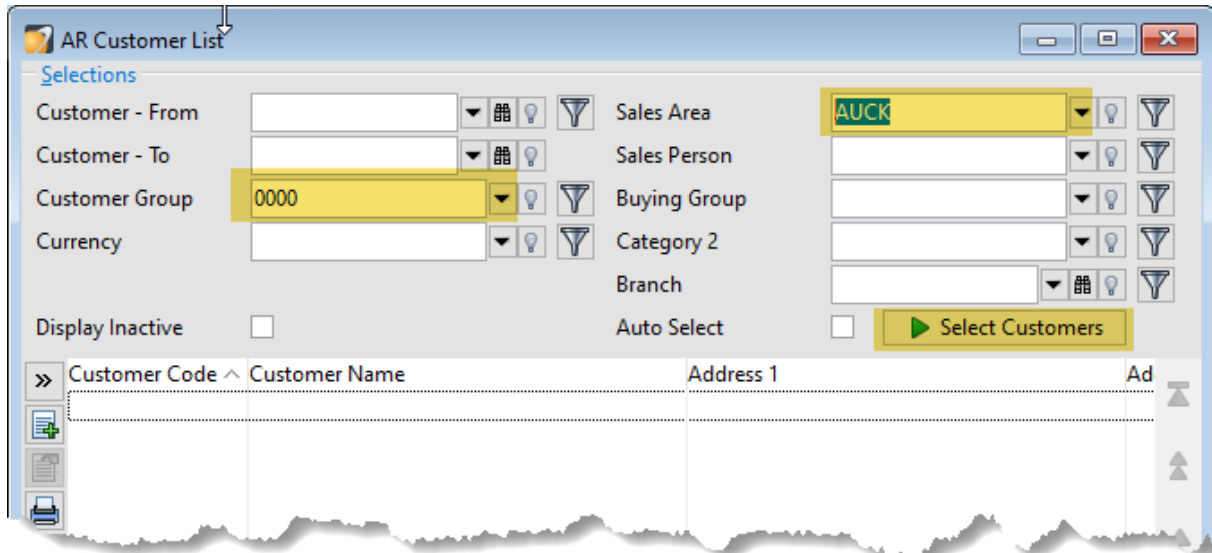
Do you find yourself always choosing the same preferences each time you open a particular List in Accredo? Did you know there is a way to have any List open with the same selection preferences set as the default every time? You can save your preferred selections for any List, by recording and saving a MaxBasic script to set the selection preferences. And you don't need to know how to code to do it! Just follow the simple steps below:

- 1 Open the list to set preferences for. For example, for the AR Customer List, go to Maintain > Accounts Receivable > Customer List.
- 2 Click  **Record Script** (Alt+F1) on the main Accredo toolbar to start recording the script. The record icon will change to the  icon, to show it is recording your actions.




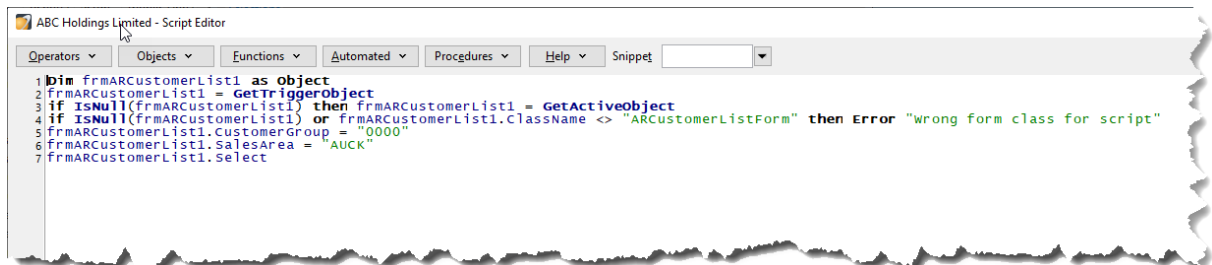
3 Make your selections in the list. For example in the AR Customer List, you may want to select a particular Customer Group and / or a Sales Area.

4 Click  **Select Customers** (F9) to apply your selections.






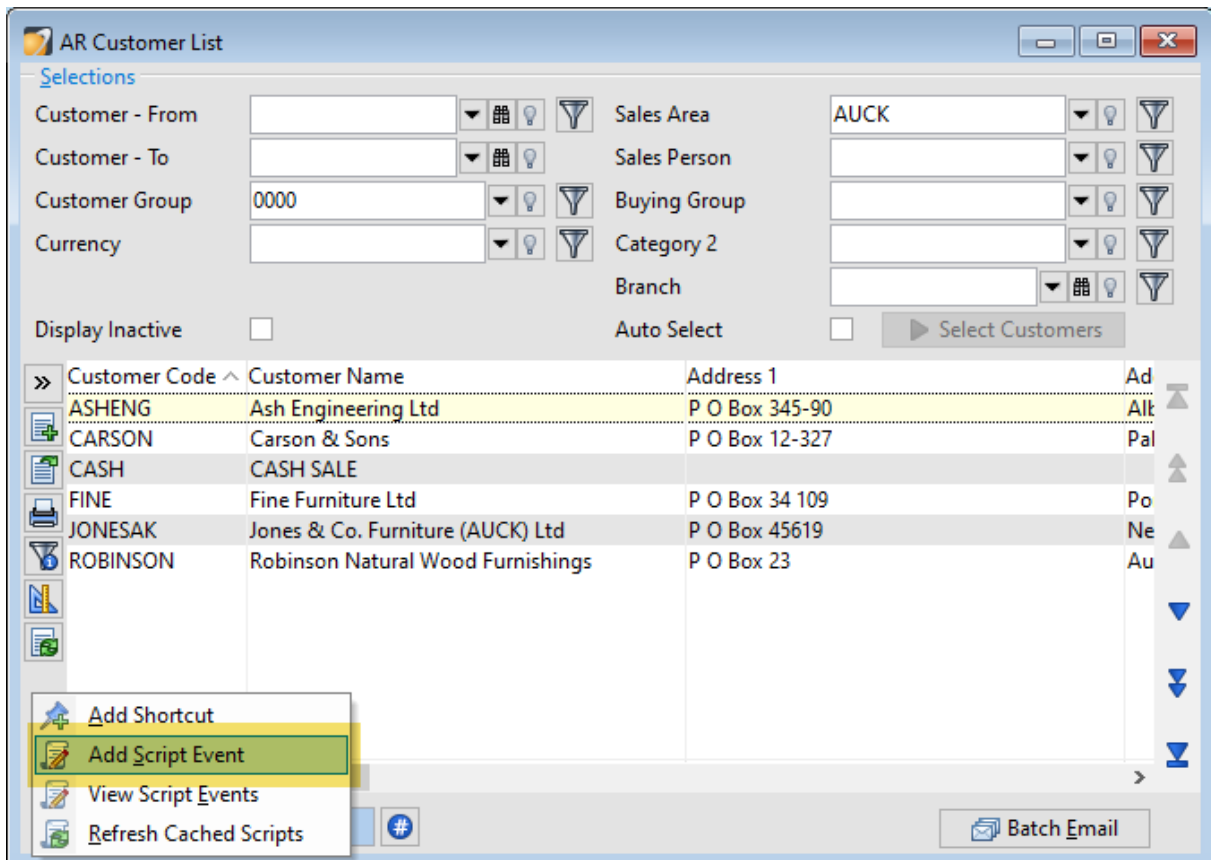
The screenshot shows the 'AR Customer List' window. It has a 'Selections' section with various filters. The 'Customer Group' is set to '0000' and the 'Sales Area' is set to 'AUCK'. A yellow box highlights the 'Select Customers' button. Below the filters is a table with columns: Customer Code, Customer Name, Address 1, and Ad. The table is currently empty.

5 Click  Stop Recording (Alt+F1) on the main toolbar. The script will appear in the Script Editor window.



```
1 Dim frmARCustomerList1 as object
2 frmARCustomerList1 = GetTriggerObject
3 If IsNull(frmARCustomerList1) then frmARCustomerList1 = GetActiveObject
4 If IsNull(frmARCustomerList1) or frmARCustomerList1.ClassName <> "ARCustomerListForm" then Error "Wrong form class for script"
5 frmARCustomerList1.CustomerGroup = "0000"
6 frmARCustomerList1.SalesArea = "AUCK"
7 frmARCustomerList1.Select
```

- 6 To test the script, close the List form, then re-open the list.
- 7 In the Script Editor, click  **Run** (ALT+R). You may be asked if you want to save the script, click No, as you don't need to save it yet.
- 8 Check that your selections have been correctly applied in the List form.
- 9 If you are happy with the selections, save the Script. In the Script Editor, click  Save (Ctrl+S).
- 10 Enter a name for your script, for example **ARCustomerSelections**. Click Save.
- 11 In the List form, right-click under the toolbar icons, then select  Add Script Event. The Script Events form will open.



The screenshot shows the 'AR Customer List' window. The 'Selections' section includes fields for Customer - From, Customer - To, Customer Group (0000), Currency, Sales Area (AUCK), Sales Person, Buying Group, Category 2, Branch, Display Inactive (unchecked), and Auto Select (unchecked). A 'Select Customers' button is visible. Below the selections is a table of customer data:


Customer Code	Customer Name	Address 1	Ad
ASHENG	Ash Engineering Ltd	P O Box 345-90	Alt
CARSON	Carson & Sons	P O Box 12-327	Pal
CASH	CASH SALE		
FINE	Fine Furniture Ltd	P O Box 34 109	Po
JONESAK	Jones & Co. Furniture (AUCK) Ltd	P O Box 45619	Ne
ROBINSON	Robinson Natural Wood Furnishings	P O Box 23	Au

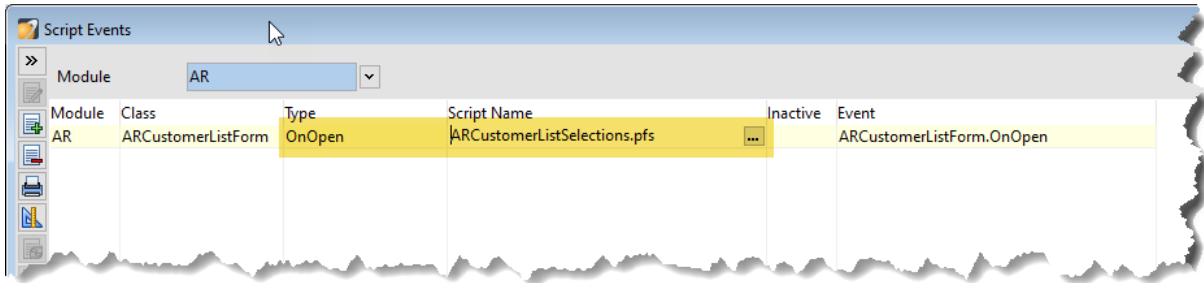
A context menu is open over the toolbar icons, with the following options:


- Add Shortcut
- Add Script Event** (highlighted)
- View Script Events
- Refresh Cached Scripts

At the bottom right, there is a 'Batch Email' button.

12 The Module and Class of the list form are already selected. Set the Type to OnOpen. This means the script will run automatically when the form is opened.

13 Click on  Select File (F2) under the Script Name, and select the script file you saved in Step 10.



14 Click  Save (F9). Close the Script Events window.

Now when you open the List again, your preferred selections will be automatically applied.