

Tips & Tricks for Accredo users

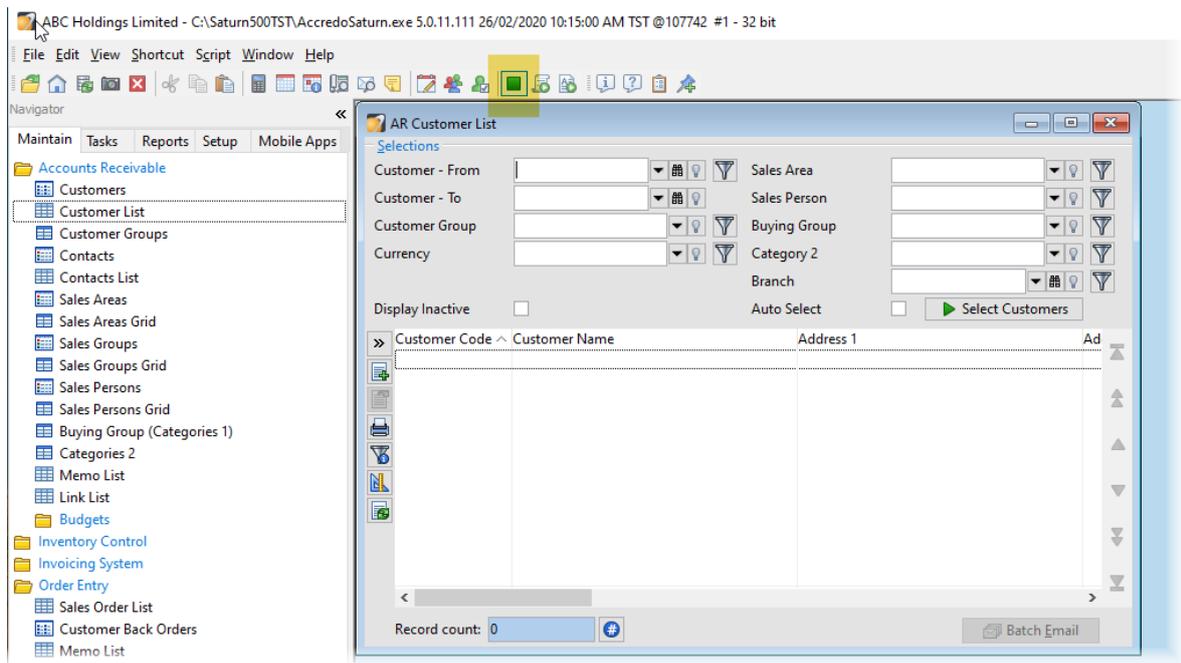
Version 5.0.11.123

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?

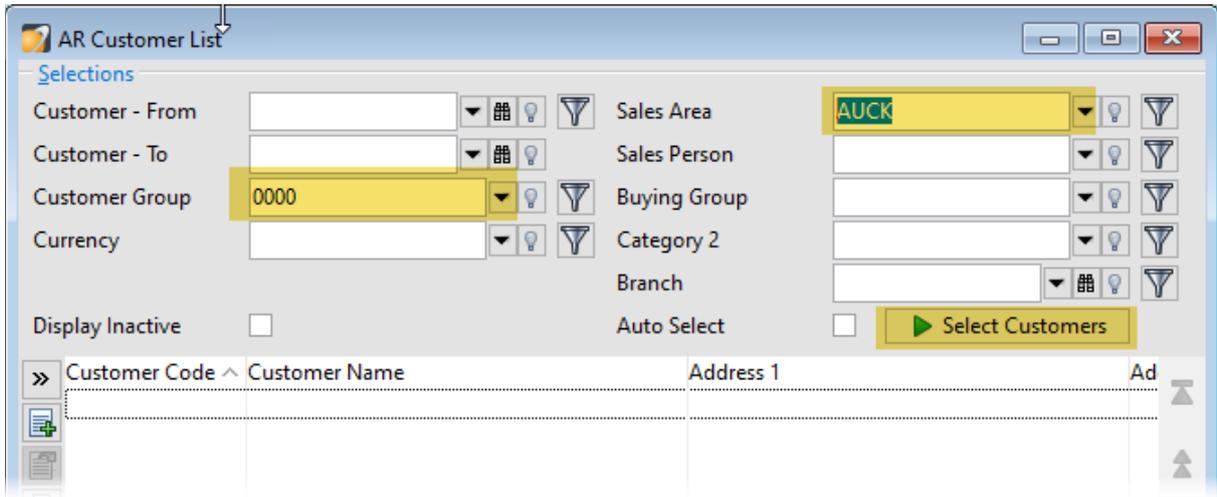
You can save your preferred selections for any List, by recording and saving a MaxBasic script to set the selection preferences. And you don't need to know how to code to do it! Just follow the simple steps below:

- 1 Open the list you want 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. 'Customer Group' is set to '0000' and 'Sales Area' is set to 'AUCK'. The 'Select Customers' button is highlighted in yellow. Below the filters is a table with columns: Customer Code, Customer Name, Address 1, and Ad.

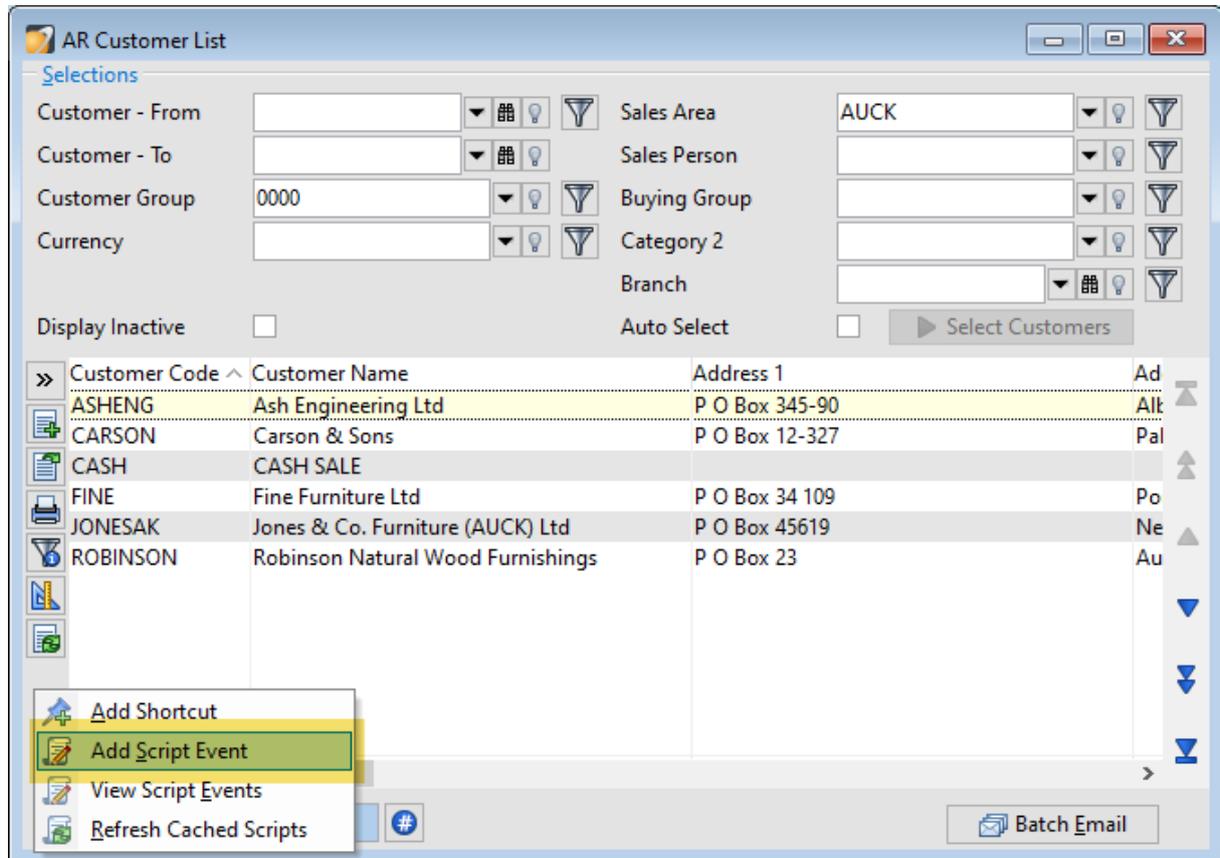
- 5 Click  **Stop Recording** (Alt+F1) on the main toolbar. The script will appear in the Script Editor window.



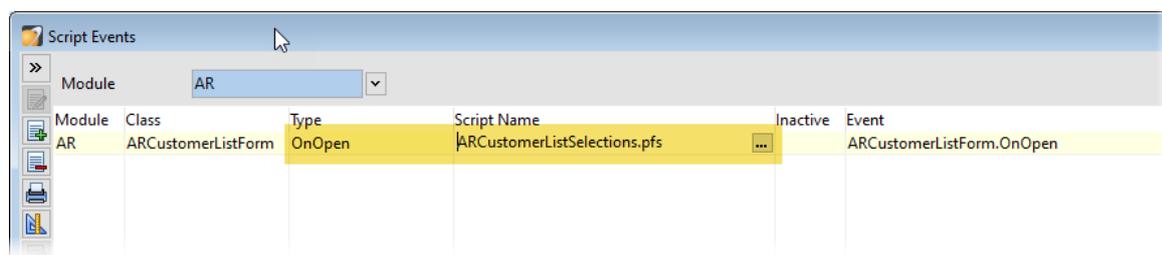
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ABC Holdings Limited - Script Editor
Operators  Objects  Functions  Automated  Procgdures  Help  Snippet
1 Dim frmARCustomerList1 as object
2 frmARCustomerList1 = GetTriggerObject
3 if IsNull(frmARCustomerList1) then frmARCustomerList1 = GetActiveObject
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.



- 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.