## Oracle EBS 11*i*, version 11.5.10 « Form Personalization »

Auteur :Joël AsselinDate de création :Octobre 20, 2006Mise à jour :May 7th, 2006Référence :Version :1.0

### **Document Control**

#### Reviewers

Nom	Secteur

#### Change Record

Date	Auteur(s)	Version	Identification des changements
20 October 2006	Joël Asselin	1.0	Initial definition of the document

#### Note to Holders:

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Make Item Type required when Attribute5 = "George" on the Item Master

### Defining a Zoom from the USERS form to the RESPONSIBILITY form

This Form Personalization will enable you to create a Zoom in a form.

First the rules in the User Form:

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### Defining a Zoom from the PO form to the SUPPLIER form

Navigate to the Purchase Orders window using the Purchasing SuperUser responsibility.

Enter the Form Personalization form. (M) Help > Diagnostics > Custom Code > Personalize.

Rule Seq: 10

Description: Create Menu Item

Trigger Event: WHEN-NEW-FORM-INSTANCE

Context: User and set the value to your user name (don't forget to do this for every Rule you define)

Select the Actions tab

Actions Seq: 10

Type: Menu

Menu Entry: SPECIAL31

Menu Label: Zoom to Supplier Form

Rule Seq: 20

Description: Check for Null

Trigger Event: SPECIAL31

Condition: :PO\_HEADERS.VENDOR\_NAME IS NULL

Context: User and set the value to your user name

Actions Seq: 10

Type: Message

Message Type: Error

Message Text: Supplier Name cannot be Null. Please enter or query a value.

Rule Seq: 30

Description: Open the Supplier Form

Trigger Event: SPECIAL31

Context: User and set the value to your user name

Actions Seq: 10

Type: Property

Object Type: Global Variable

Target Object: XX\_VENDOR (or name it wathever you want)

Property Name: VALUE

Value: =: PO\_HEADERS.VENDOR\_ID (using Object's identifier ID's as the Global Variable's value makes for a more robust custom)

Actions Seq: 20

Type: Builtin

Builtin Type: Launch a Function

Function Code: AP\_APXVDMVD

Function Name: Suppliers

Save your work and exit all the forms.

At this point, you should test what you have done so far. From the Navigator, reopen the Purchase Orders form. From the menu bar, select Actions > Zoom to Supplier form (the menu item you defined earlier). Because you do not yet have a Supplier entered on your new PO and you're trying to Zoom to the Supplier form, you should see the error message that you defined in the Rule Seq 20. If this works, then continue with following:

Navigate to the **Suppliers** window using the Purchasing SuperUser responsibility.

Enter the Form Personalization form. (M) Help > Diagnostics > Custom Code > Personalize.

Rule Seq: 10

Description: Set initial value of Global Variable

Trigger Event: WHEN-NEW-FORM-INSTANCE

Context: User and set the value to your user name

Select the Actions tab

Actions Seq: 10

Type: Property

Object Type: Global Variable

Target Object: XX\_VENDOR (The Global Variable you defined earlier)

Property Name: INITIAL VALUE

Value: =NULL

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Rule Seq: 20

Description: Go to Block VNDR and enter Query mode

Trigger Event: WHEN-NEW-FORM-INSTANCE Condition: :GLOBAL.XX\_VENDOR IS NOT NULL Context: User and set the value to your user name Actions Seq: 10 Type: Builtin Builtin Type: GO\_BLOCK Argument: VNDR Actions Seq: 20 Type: Builtin Builtin Type: DO\_KEY Argument: ENTER\_QUERY -----Rule Seq: 30 Description: Execute query, go to Block SITE and reset Global Variable value to NULL Trigger Event: WHEN-NEW-RECORD-INSTANCE Trigger Object: VNDR Condition: :GLOBAL.XX\_VENDOR IS NOT NULL Processing Mode: Both Context: User and set the value to your user name Actions Seq: 10 Type: Property Object Type: Item Target Object: VNDR.VENDOR\_ID Property Name: VALUE Value: =:GLOBAL.XX\_VENDOR Actions Seq: 20 Type: Builtin Builtin Type: DO\_KEY Argument: EXECUTE\_QUERY

Actions Seq: 30

Type: Property

Object Type: Global Variable

Target Object: XX\_VENDOR

Property Name: VALUE

Value: =NULL

Now go ahead and test your custom. Open the Purchase Orders form and start defining a new standard PO, enter a supplier in the Supplier field (in my example, I used "ABC Corp"). Click on (M) Actions > Zoom to Supplier Form

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Bingo!, you are automatically taken to the Supplier form for "ABC Corp".

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### Default user value in Users form when in query mode

This Form Personalization will default the current user value in the user form when in query mode.

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### Display a personalized form value in the FORMS\_MDI\_WINDOW

This Forms Personalization will change the default display of the FORMS\_MDI\_WINDOW for a window (what is displayed in your opened windows at the bottom of your screen). It does not matter in which from it is defined. It will apply anyway. Logging in and out is required to see the change.

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### Warn Users Entering Sales Orders on Sunday

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### Hide the Person, Customer and Fax field in the Users form

#### **Responsibility: System Administrator**

1 - Ensure to set system profile 'Hide Diagnostics menu entry' to 'No' and 'Utilities:Diagnostics' to 'Yes' at the user level.

2 - Open the Users form. (N) Security > User > Define.

3 - This is the basic Users form as shown here:

User Name			Person		
Password		c	ustomer		
Description			Supplier		
			E-Mail		
Password Expiration	on		Fax		
○ <u>D</u> ays			Effe	ctive Dates -	
OAcce				From 02	2-OCT-2006
None	9			To	
ect Responsibilities	Indirect Responsibilities	Securing Attribut	es		
ect Responsibilities	Indirect Responsibilities	Securing Attribut	es Security	— Effective	Dates —
ect Responsibilities Responsibility	Indirect Responsibilities Application	Securing Attribut		- Effective	Dates
			Security		

- 4 From the menu, select (M) Help > Diagnostics > Custom Code > Personalize.
- 5 If some Rules are already defined in the Users form, you will see them this window (as in this example).
- 6 Add a new Rule by selecting (M) File > New.
- 7 This is the Form Personalisation form and it's Rules already defined. We will be adding seq. 40.

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	nd date res			Form	-	
and the second second		ponsibility when select "System Administrator"		Function	-	0
passes and pass		Customer and Fax fields	0	Function	•	2
ndtion	Actions					
Tr	igger Event	WHEN-NEW-FORM-INSTANCE	.)			
	gger Object					
	Condition		-			
			-			
-						
-Conte	ssing Mode	Not in Enter-Query Mode *				
Level		Value				
User		* JA3154				
		-				

- A Rules Seq.: 40
- B Description: Hide Person, Customer and Fax fields
- C Trigger Event: WHEN-NEW-FORM-INSTANCE
- D Context or Scope: Set at User level and enter your user in the Value field
- E Select the Actions tab. This is the Actions tab of Rule seq. 40

Seq	Description							Level		Enabled
5	special TES	ST						Form	-	
20	end date re	esp. restrict						Form		
30	End Date n	esponsibility when	select "System /	Adminis	trator*			Function		
40	Hide Perso	n, Customer and F	ax fields					Function		2
Seq	n Actions Type	Description	Language	Enab	led					
1	Property	*	All	- R	-		Select By	Text)		
_	<u> </u>	-				Object Type	Item			-
-	<u> </u>	<u> </u>				Target Object	I			-
-				10		Property Name	PROMPT_TEXT			
-	<u> </u>					Value				-
-		-		10						
-		-		10			Get Value			
		•		- 0			Ter Anna			
		*		-	-					

- F Action Seq.: 1
- G Type: Property
- H Object Type: Item
- I Select the Select By Text button

Text	Туре	Object Name	
User Name (Users)	TEXT ITEM	USER.USER_NAME	
Password (Users)	TEXT ITEM	USER.USER_PASSWORD	
Description (Users)	TEXT ITEM	USER.DESCRIPTION	
Password Expiration (Users)	RADIO GROUP	USER.PASSWORD_EXPIRATION_TY	PE
Days (Users)	RADIO BUTTON	USER.PASSWORD_EXPIRATION_TY	(PE
Accesses (Users)	RADIO BUTTON	USER.PASSWORD_EXPIRATION_TY	(PE
None (Users)	RADIO BUTTON	USER.PASSWORD_EXPIRATION_TY	(PE
Password Expiration: Days (Users)	TEXT ITEM	USER.PASSWORD_LIFESPAN_DAY	s
Password Expiration: Accesses (Users)	TEXT ITEM	USER.PASSWORD_LIFESPAN_ACC	ES!
Person (Users)	TEXT ITEM	USER.EMPLOYEE_NAME	
Customer (Users)	TEXT ITEM	USER.CUSTOMER_NAME	
Supplier (Users)	TEXT ITEM	USER.SUPPLIER_NAME	
(			Þ

- J Select the Person (Users) item from the LOV
- K Property Name: DISPLAYÉD
- L Value: False
- M Save your work
- N When you are done, it should look like this:

pa	Description special TE	ST	2							Form	+	Enabled
20	end date n	_	. restrict		_					Form	-	
80		-	onsibility when	select "System	n Adr	ninist	rator"			Function	-	
10	-	-	Customer and Fa							Function	*	2
nditi						_						
Seq 1	Property		Description	Language	-	Enab	ed		Select By	Text)		
	<u></u>	~			*	0		Object Type	Item			÷
_		*			*			Target Object	USER.EMPLOYEE_	NAME		
-		-	L					Property Name	DISPLAYED			
-						0		Value	FALSE ]			-
-	-	*	[		*							
-		-	[		*				Get Value			
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1		+			Ŧ		-					

O - Repeat Steps F to L for the Customer and Fax items. Save all of your work. It should now look like this:

Seq	Description							Level	Enabled
5	special TEST							Form	- 0
20	end date resp	p. restrict						Form	-
30	End Date res	ponsibility when	select "System.	Admi	istrator"	93		Function	•
40	Hide Person,	Customer and Fa	ax fields					Function	• 2
Seq 1	Type Property *	Description Person	Language All		bled		Select By Te	ot)	
2	Property *	Customer	All	*		Object Type	Item		
31	Property *	Fax	All	-			distant and the second s		-
	-			_		Property Name	DISPLAYED		
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		1		_			Get Value		
<u> </u>		<u></u>		_					
					-				

P - Close the Form Personalization form, close the User form and reopen it. Your User form should now look like this: Notice that the User, Customer and Fax fields are no longer displayed.

User Name						
Password			0.555			
Description			Supplier			
			E-Mail			
Password Expiratio			- Effe	ctive Dates		
OAcce			La cine		02-OCT-2006	٦
None			- 0	To		4
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act Responsibilities 丨	Indirect Responsibilities		Security	- Effectiv		

### Ask user to see if they want to go into Query Mode when entering a Window

Navigate to the Master Items window using the Inventory Super User Responsibility.

Enter the Form Personalization form. (M) Help > Diagnostics > Custom Code > Personalize.

Rules Sequence: 10

Description: Query Mode

Level: Form

Enabled: Yes

Trigger Event: WHEN-NEW-ITEM-INSTANCE

Trigger Object: MTL\_SYSTEM\_ITEMS.INVENTORY\_ITEM\_MIR

Context: User level and set value to your user name.

Save your work.

Function Name	INVIDITM Form Name INVIDITM Debug	Mode Off	
Seq Description		Level	Enabled
0 Query Mode		Form	- 2 -
			-
			- 0
			- 0
ndtion Actions			
Trigger Event	WHEN.NEW-ITEM-INSTANCE (You can enter additional event names.)		
Trigger Object	MTL_SYSTEM_ITEMS.INVENTORY_ITEM_I		
Condition			
Condition	-		
	I		
Deserve Marke			
Processing Mode Context	Not in Enter-Query Mode		
evel	Value		
User	* JA3154		
	(v)		

Select the Actions tab.

Actions Sequence: 10

Type: Message

Message Type: Warn

Message Text: Do you want to enter Query Mode?

Actions Sequence: 20

Type: Builtin

#### Builtin Type: DO\_KEY

#### Argument: ENTER\_QUERY

Save your work.

eq 0	Oescription Query Mod	le	I		_		_				Form	Enabl
iditio ieq 10	Type Message Builtin		Description Warn Message Do Key - Enter Query	Language All All		inable 2 0	10 E	Message Type Message Text	-	•] ant to enter 0	uery Mode?	
					<b>Delete</b>		•					

Close the Form Personalization window and the Master Item window. Reopen the Master Item window and voil‡!

Organization	V1	Vision Ope	erations				Display At	ributes	1.1.1.1
ltern Description						[]]	OMaster	OQrg	•8
Main Inventory	Bills	Asset	Costing	Purch	Recei	Physi	Gener	MPS/M	Lead
- Unit of Measur	0			- Conversio					
Primary	Each			O Standard			User Item	Туре	
Tracking	Prima	ny	*	O Item spe			Item	Status Activ	
Pricing	Prima	ry	*	_			item -		
Secondary						******			
Defaulting			*		Do you v	vant to en	ter Query Mot	le?	
Deviation I	actor +		0						
Deviation	Factor -	Č.	0			QK	Cancel		
Long Description				-					

### Changing to the Responsibilities form title

The following Form Personalization intermediate example demonstrates a change to the Responsibilities form title. When the Responsibilities form has a query record, the form's title will be "Responsibilities ('RECORD QUERIED')" with 'RECORD QUERIED' being the Responsibility Name of the actual record being queried. When there is no record, the title will be "Responsibilities ('NEW')".

Navigate to the Responsibilities window using the System Administrator responsibility.

Enter the Form Personalization form. (M) Help > Diagnostics > Custom Code > Personalize.

Rules Sequence: 10

Description: Set title change

Trigger Event: WHEN-NEW-RECORD-INSTANCE

Trigger Object: RESPONSIBILITY

Context: User and set value to your user

Select the Actions tab

Action sequence: 10

Type: Property

Object Type: Window

Target Object: RESPONSIBILITY\_WINDOW

Property name: TITLE

Value: ='Responsibilities ('| | NVL(:RESPONSIBILITY.RESPONSIBILITY\_NAME,'NEW') | |')'

Save your work and close the Form Personalizations and the Responsibilities forms.

Reopen the Responsibilities form. When you have a new responsibilities, it should look like this:

Responsibili	ication		Effective	Dates From 04-0CT-2006 To
Available From Qracle Applications Oracle Self Service W Oracle Mobile Applica	eb Applications	Da	ta Group Name Application	
Menu Web Host Name Web Agent Name			Application	
Menu Exclusions 📜	Excluded Items	Securing Attributes		
Type Function	Name		Description	

When you have a queried record, it should look like this:

Application Responsibility Key	-		ffective Dates — From	01-JAN-1951
Description	_		To	
vailable From Pracle Applications Oracle Self Service Web App Dracle Mobile Applications		Data Group Name Application	Standard Inventory	
Menu Install Web Host Name Web Agent Name	Menu - System Administr	atc Request Group - Name Application	All inclusive Inventory	
Nenu Exclusions Exclu	ded Items Securing Attri	butes		
Type N	ame	Description		
Function •				]=
-				

# Zooming to the AR Receipt form from the AR Transactions form and defaulting the corresponding Receipt number.

AR Transactions Form

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🗢 Form P	ersonalizations (	Transactions) 👯						르 제 X
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20	Check for NU						Function 👻 🗹	
30	Set Value of	Global Variable	and Open the Receipt Fo	rm			Function 👻 🗹	8
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Conditi	ion Actions							
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	Trigger Object							
	Condition					<u> </u>		
						<u> </u>		
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	ontext	Not in Litter-Qu	iery moue					
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Use	er	- JA3154						
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	Insert 'Get' Exp	ression	Insert Item Value			( <u>Va</u> lida	te Apply Now	
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Fi	unction Name	AR_ARXTWMAI_	HEADER	Eorm Name		Debug Mod	de Off	
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20	Check for NU						Function 🔹 🗹	1
30	Set Value of	Global Variable	and Open the Receipt Fo	rm			Function -	
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Insert 'Get' Expression... Insert Item Value.... Validate Apply Now

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Function Name AR_ARXTWMAI_HEADER Form Name ARXTWMAI Debug Mo	de Off 🔹
Seq Description	Level Enabled
10 Create new Menu Item	Function 🚽 🗹 🚔
20 Check for NULL	Function 🔹 🔽
30 Set Value of Global Variable and Open the Receipt Form	Function 👻 🧭
Condition Actions	Ŭ
Trigger Event MENU1 (You can enter additional event names.)	
Trigger Object	
Condition :TGW_HEADER.TRX_NUMBER IS NULL	
Processing Mode	
-Context	
Level Value	
User JA3154	
(Insert 'Get' Expression Insert Item Value )	late Apply Now

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20	Set Initial Va	lue of Global Variable	Function 🔽 📝
30	Go to Block	RECEIPT and Enter Query Mode	Function 👻 🦾
40	Execute Que	ry, go to Block RGW and reset Global Variable to NULL	Function 👻 🚽
Conditi	on Actions		
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	Trigger Object		
	Condition		
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20 Set Initial Va	lue of Global Variable	Function 👻 🖉
30 Go to Block	RECEIPT and Enter Query Mode	Function
40 Execute Que	ry, go to Block RGW and reset Global Variable to NULL	Function 🔹 🔽
Condition Actions		0
Trigger Event	WHEN-NEW-FORM-INSTANCE (You can enter additional event names.)	
Trigger Object		
Condition	GLOBAL.XX_TRXNUMBER IS NOT NULL	
Processing Mode	Not in Enter-Query Mode	
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Level	Value	
User	▼ JA3154	
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I <u>n</u> sert 'Get' Exp	ression Insert Item Value Valid	ate Apply Now

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20	Set Initial	Val	ue of Global Vari	iable						Function 🗾 🗹		
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onditio	n Action	s										
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Seq	Description		Level	Enabled
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20	Set Initial Va	lue of Global Variable	Function 🔹	) 🗷 💡 –
30	Go to Block	RECEIPT and Enter Query Mode	Function 🝷	j 🗷 👘
40	Execuite Que	ry, go to Block RGW and reset Global Variable to NULL	Function 💌	Ì 🗹 🚽
Conditio	n Actions			Ŭ
	Trigger Event	WHEN-NEW-BLOCK-INSTANCE (You can enter additional event names.)		
1	Trigger Object	RGW_FOLDER		
	Condition	:GLOBAL.XX_TRXNUMBER IS NOT NULL		
	cessing Mode	Not in Enter-Query Mode		
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		Value		
User		JA3134       V       V       V       V       V       V       V		
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Seq	Description										Level	Ena	abled	
10	Uncheck A	pply	/ Checkbox after inse	ert							Function	-		
20	Set Initial	∕alı	ie of Global Variable	!							Function	-	1	
30	Go to Bloc	k RE	ECEIPT and Enter Qu	ery Mode							Function	-	1	
40	Execute Q	uery	, go to Block RGW a	nd reset G	loba	al Vari	able	to NULL			Function	-	1 🖯	
Condi	tion Actions													
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Sec	· · · · · · · · · · · · · · · · · · ·	- Y	Description	Language		Enable	d							
10	Property	-		All	-		-			Select By Tex	t			
20	Builtin	-		All	-			Obje	ct Type	Block			-	
30	Property	-		All	-			Target	Object	RGW FOLDER			_	
I II		-		ļ	-			Property	/Name	DEFAULT WHERE			_	
		-			-				Value	='CASH RECEIPT ID II	I ('II 'SELECT			
		-			-				Þ	CASH_RECEIPT_ID FR				
		-			-		Edit	itor (2000-000-000-00-00-00-00-00-00-00-00-00-	- 19 1999-1999					ee ×
I U		-			-					SELECT CASH_RECEIPT				
		Ŧ			-					TIONS_ALL WHERE APPL	IED_CUSTOMER	₹_TRX_I	D=:GLOB/	AL.
		•			-		- XX_	_TRXNUMBER /	AND DISF	/LAY="Y" []).				
	Insert 'Get' E		agian	Insert Iter	~ \/	alua								
	ilisen Ger L.	chie	551011	insen ner	II Yo	alue								
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	unction Name Description Uncheck Ap Set Initial V Go to Block Execute Qu	/ opl /al : R	eceipt) 20000000 R_ARXRWMAI_HE y Checkbox after i ue of Global Varia ECEIPT and Enter i y, go to Block RGW	ADER nsert ble Query Mode				Form Name ARXRV	Debug №	lode Off Level Function Function Function Function		Enable	Ŧ
Seq 10 30 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Builtin			Language All All All		Enabl V V	ed (1) vooroor	Builtin Type Argument	KEY CUTE_QUERY Add Parameter.				
	l <u>n</u> sert 'Get' Ex	pre	ession	insert ite	m∨	alue				lidate	Apply	y Now	$\square$

😑 Form I	Personalizations	s (Receipt) - Hereit			•••••••		9999999	•••••••	•••••••		-000 <b>- 2</b> 2	л×
	Function Name	AR_ARXRWMA	_HEADER		Form Name	ARXRW	MAI	Debug M	ode Off			-
Seq	Description								Level	E	Enabled	
10	Uncheck A	pply Checkbox af	ter insert						Function	•		- F
20	Set Initial \	/alue of Global V	ariable						Function	-		
30	Go to Block	RECEIPT and Er	ter Query Mode						Function	*		
40	Execute Qu	iery, go to Block	RGW and reset Glob	al Varia	able to NULL				Function	-	v .	-
Condi	tion Actions											
Sec 10	Type Property	Descri dion	Language	Enabled	d							
20	Builtin				_			Select By Te	ext			
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30	Property	-	All	4 - 1	Target	t Object	XX_TRX	KNUMBER				
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		<b>T</b>		j 🗆 🤅	攴							
	Insert 'Get' Ex	pression	Insert Item ∖	/alue					date	Apply	Now	)

### Make Item Type required when Attribute5 = "George" on the Item Master

Item Master form

Form Personalizations (Master Items)			×ях
Function Name INV_INVIDITM	Form Name INVIDITM	Debug Mode Off	-
Seq Description		Level Enabled	
10 Query Mode		Form -	<u> </u>
20 Make Item Status required when Attribute5 is George	MTL_SYSTEM_ITEMS.PRIMARY_UNI	CONCRETE MIR	
Condition Actions			
Trigger Event WHEN-NEW-ITEM-INSTANCE	, <u>O</u> K	Cancel Search	
Trigger Object MTL_SYSTEM_ITEMS.PRIMARY_UNIT_OF	·		
Condition \${item.MTL_SYSTEM_ITEMS.ATTRIBUTE	i.value} = 'George'		
Decession Made Hard Free Doctor			
Processing Mode Not in Enter-Query Mode Context	<b>•</b>		_
Level Value			
User JA3154	A		
×			
Insert 'Get' Expression Insert Item Value		Validate Apply Now	
Form Personalizations (Master Items) 2000000000000000000000000000000000000			४ ज ×
Function Name INV_INVIDITM	Form Name INVIDITM	Debug Mode Off	-
		•	
Seq_Description		Level Enabled	
20 Make Item Status required when Attribute5 is George		Function V	
			8
Т			-
Condition Actions			
	d		

Seq	Туре	Description	Language	Enabl	led			
10	Property •	· [	All		-	-		Select By Text
		·					Object Type	ltem ▼
			<u> </u>				Target Object	MTL_SYSTEM_ITEMS.ITEM_TYPE_DSP_MIR
					1		Property Name	REQUIRED
							Value	TRUE
Ĭ		, 		- - -				Get Value
				] 🗆				
		r [		·] 🗆	J	5		
	l <u>n</u> sert 'Get' Exp	ression	Insert Item	/alue				Validate Apply Now