



T250 Inquiry Forms

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Sr. Technical Account Manager

Timing and Agenda

October 12, 2022 -10:00 AM -11:30 AM

Day 1

Lesson 1.1: Configure the Inquiry Form

October 13, 2022 -10:00 AM -11:30 AM

Day 2

Lesson 1.2: Configure a Filter for the Inquiry Form

Lesson 1.3: Dynamically Add Filtering Conditions

Lesson 1.4: Retrieve Aggregated Data

Timing and Agenda

October 14, 2022 -10:00 AM -11:30 AM

Day 3

Lesson 1.5: Add Redirection Links to the Grid

Lesson 2.1: Add the Payment Info Tab

Day 1

A close-up photograph of a person's hand pouring beer from a tap into a glass. The person is wearing a checkered shirt and a watch. The glass has the Devil's Peak logo and text on it. The background is a blurred bar or brewery setting.

Part 1: The Open Payment Summary Form

Lesson 1.1: Configure the Inquiry Form

Learning Objectives

In this lesson, you will learn how to create an inquiry form that does not have a filter.

Figure: The basic Open Payment Summary form








Open Payment Summary


CUSTOMIZATION








TOOLS ▾






								All Records ▾	⌵
			Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance	
>	📎	📄	000001	Completed	INV000049	25.00	5/12/2022	30.00	
	📎	📄	000002	Completed	INV000050		5/12/2022	0.00	
	📎	📄	000003	Completed	INV000051	0.00	4/13/2022	45.00	

Figure: The Open Payment Summary form with overdue payments

Search...   Yogifon  4/14/2022 1:06 AM    

Open Payment Summary CUSTOMIZATION TOOLS 

     All Records  

			Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
>			000003	Completed	INV000051	0.00	4/13/2022	45.00

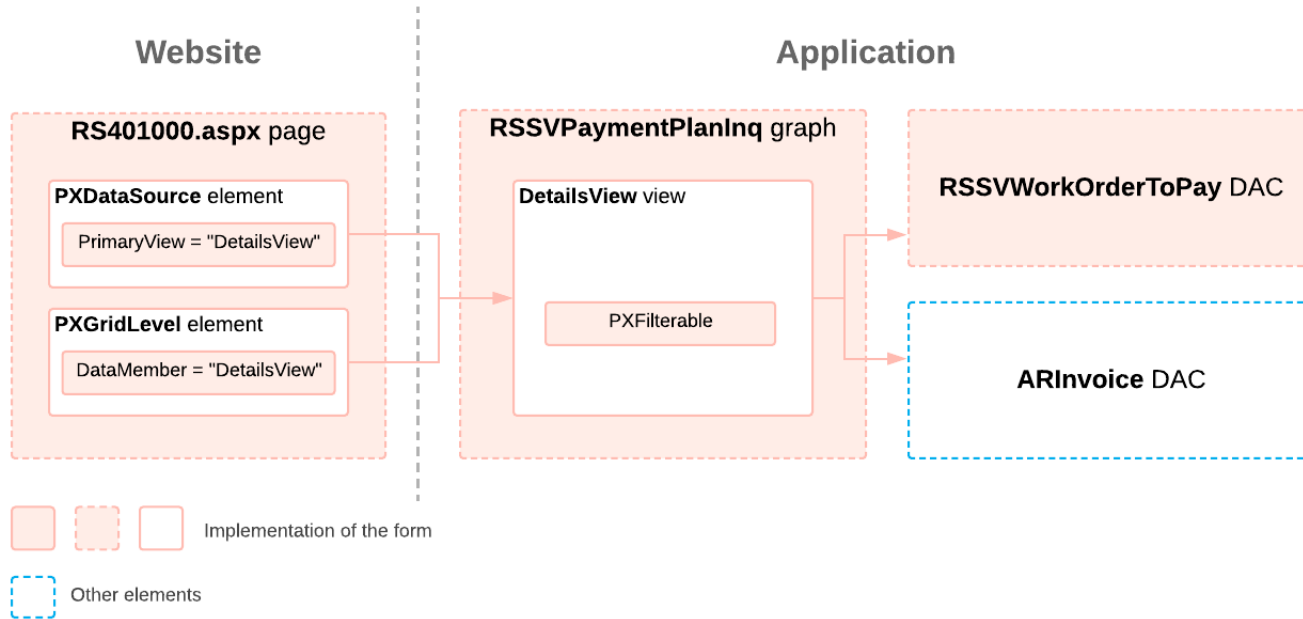
Lesson Summary

In this lesson, you have learned how to create a simple inquiry form that displays data and provides standard filtering. You have defined the following components of the inquiry form:

- The DAC, with unbound fields that are displayed in the grid
- The inquiry graph, in which you have defined a data view for the grid with the PXFilterable attribute
- The ASPX page, in which you have defined columns for the grid

Lesson Summary

Implementation of the Inquiry Form



Day 2

Lesson 1.2: Configure a Filter for the Inquiry Form

Learning Objectives

In this lesson, you will learn how to do the following:

- Define a PXFilter data view
- Display the UI elements associated with the filter parameters in the page URL

Figure: The revised Open Payment Summary form

Open Payment Summary

CUSTOMIZATION

TOOLS ▾



Customer ID:

Service:

All Records ▾

			Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
>			000001	Completed	INV000049	25.00	5/12/2022	30.00
			000002	Completed	INV000050		5/12/2022	0.00
			000003	Completed	INV000051	0.00	4/13/2022	45.00

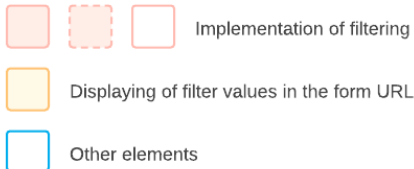
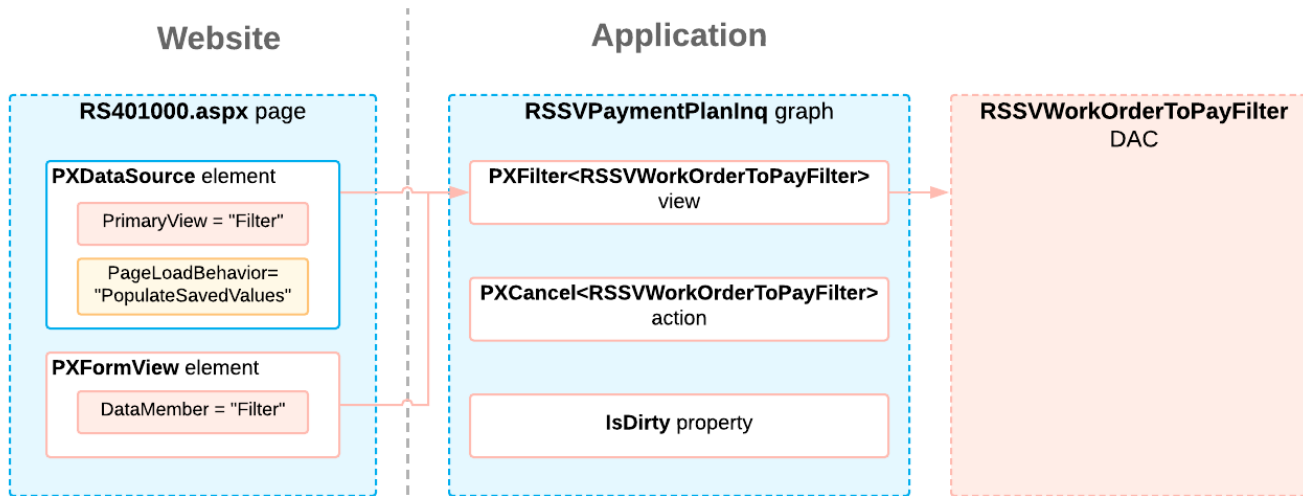
Lesson Summary

In this lesson, you have learned how to define an inquiry form with a filter. To add a filter to the inquiry form, you have performed the following actions:

1. Defined the DAC that provides the filtering parameters for the inquiry form
2. In the graph, defined the following:
 - The Cancel action
 - The PXFilter data view that provides data for the filter
3. In the ASPX page, added the PXFormView container with the elements that correspond to the filtering parameters Also, you have learned how to display the selected filter values (that is, the selection criteria) in the form URL by configuring the PageLoadBehavior attribute in the ASPX page.

Lesson Summary

Adding Filtering to the Inquiry Form



Lesson 1.3: Dynamically Add Filtering Conditions

Learning Objectives

In this lesson, you will learn how to define a data view delegate.

Figure: The form with repair work orders and sales orders

Open Payment Summary

CUSTOMIZATION TOOLS ▾



Customer ID:		<input type="text"/>							
Service:		<input type="text"/>							
					<input type="text" value="All Records"/>				
			Order Type	Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
>			WO	000001	Completed	INV000049	25.00	5/12/2022	30.00
			WO	000002	Completed	INV000050		5/12/2022	0.00
			WO	000003	Completed	INV000051	0.00	4/13/2022	45.00
			WO	000004	Completed	INV000052	0.00	5/12/2022	45.00
			SO	000005		INV000045		1/9/2019	0.00
			SO	000008		INV000046		1/19/2019	585.00
			SO	000009		INV000046		1/19/2019	585.00
			SO	000010		INV000047		1/19/2019	2,650.00
			SO	000011		INV000047		1/19/2019	2,650.00

Figure: The Open Payment Summary form for a particular customer

Open Payment Summary

CUSTOMIZATION TOOLS ▾



Customer ID:

Service:

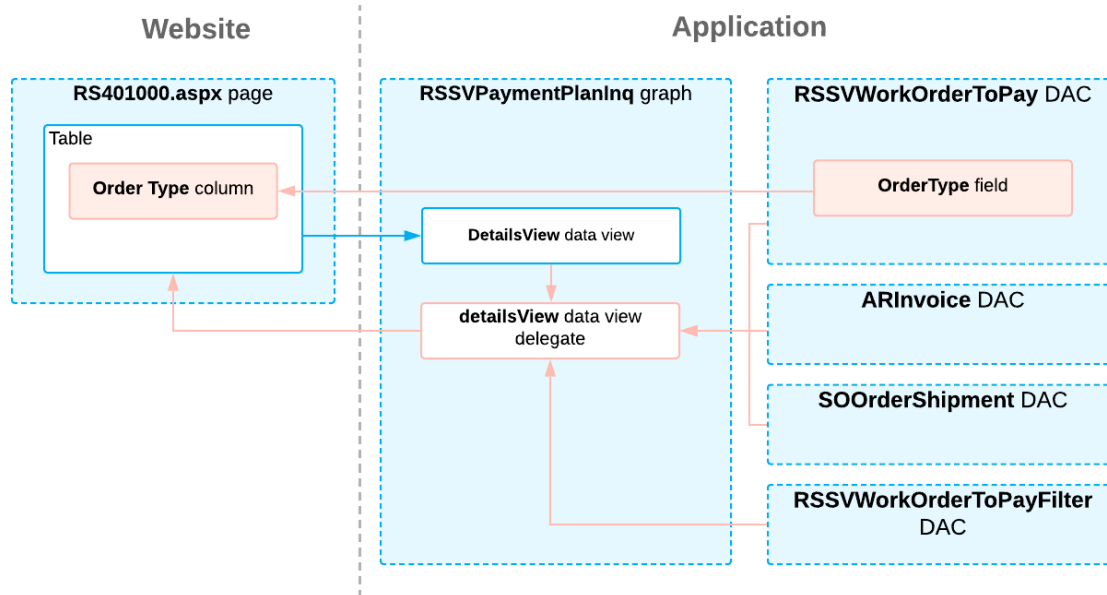
			Order Type	Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
>			WO	000004	Completed	INV000052	0.00	5/12/2022	45.00
			SO	000005		INV000045		1/9/2019	0.00
			SO	000008		INV000046		1/19/2019	585.00
			SO	000009		INV000046		1/19/2019	585.00
			SO	000010		INV000047		1/19/2019	2,650.00
			SO	000011		INV000047		1/19/2019	2,650.00



Lesson Summary

In this lesson, you have learned how to define a data view delegate. You have also learned how to display different types of entities in one grid by using a data view delegate.

Lesson Summary

Implementation of a Data View Delegate and a New Data Field



  Implementation of a data view delegate and a new column

  Other elements

Lesson 1.4: Retrieve Aggregated Data

Learning Objectives

As you complete this lesson, you will learn how to aggregate data in a fluent BQL query.

Figure: The filtered and aggregated data on the Open Payment Summary form

Open Payment Summary

CUSTOMIZATION TOOLS ▾



Customer ID: 🔍

Service: 🔍

Show Total Amount to Pay

🔄 + × |↔| ☒ All Records ▾ 🔍

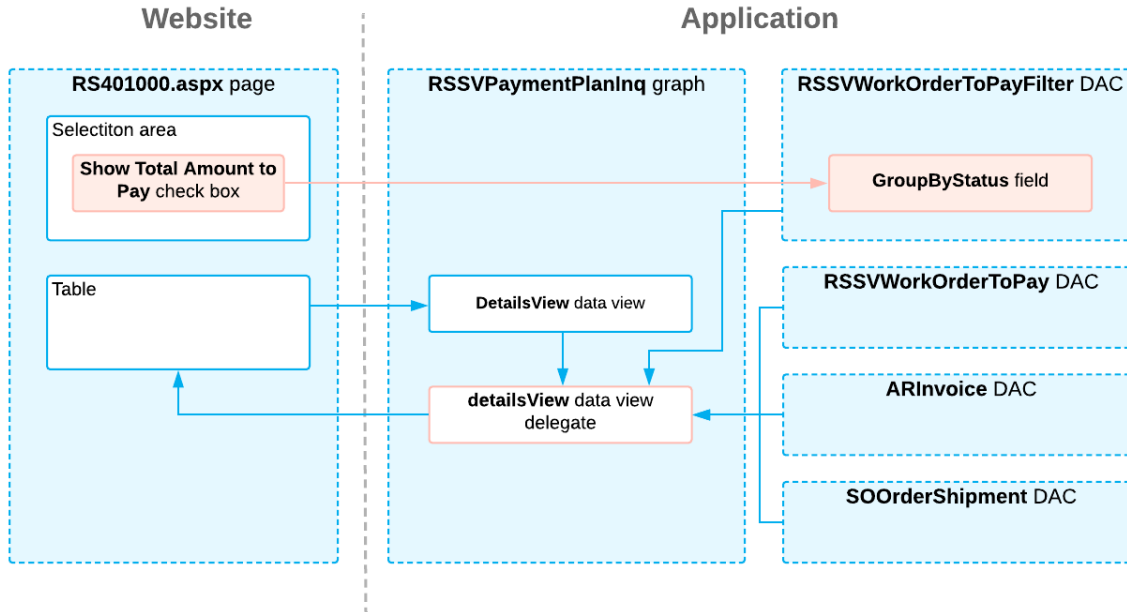
Order Type	Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
WO		Completed				120.00
SO	000005		INV000045		1/9/2019	0.00
SO	000008		INV000046		1/19/2019	585.00
SO	000009		INV000046		1/19/2019	585.00
SO	000010		INV000047		1/19/2019	2,650.00
SO	000011		INV000047		1/19/2019	2,650.00

Lesson Summary

In this lesson, you have learned how to group data and calculate values for grouped data. Also, you have learned how to assign different queries depending on the selected filter value.

Lesson Summary

Implementation of an Aggregating Query and a New Check Box



Day 3

Lesson 1.5: Add Redirection Links to the Grid

Learning Objectives

As you complete this lesson, you will learn how to implement a redirection inside an action handler.

Figure: The links on the Open Payment Summary form

Open Payment Summary

CUSTOMIZATION TOOLS ▾



Customer ID:

Service:

Show Total Amount to Pay

⏪ + × |↔| ☒ All Records ▾ ⏩

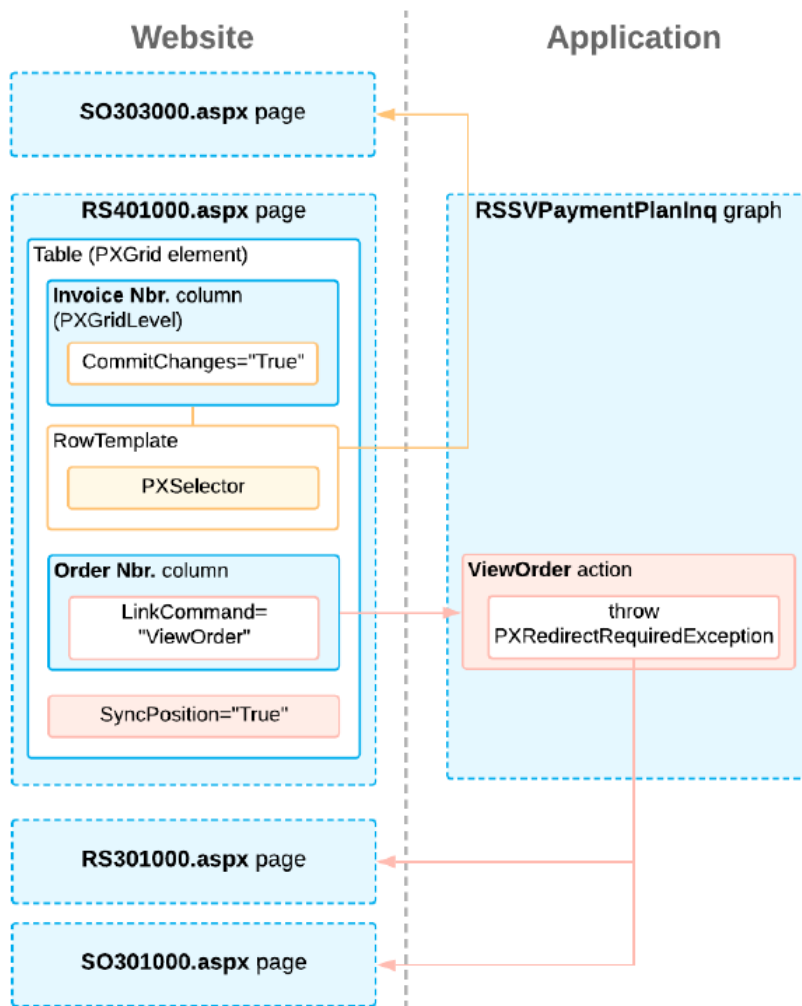
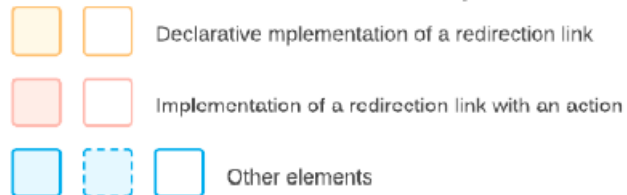
Order Type	Order Nbr.	Status	Invoice Nbr.	Percent Paid	Due Date	Balance
WO	000001	Completed	INV000049	25.00	5/12/2022	30.00
WO	000002	Completed	INV000050		5/12/2022	0.00
WO	000003	Completed	INV000051	0.00	4/13/2022	45.00
WO	000004	Completed	INV000052	0.00	5/12/2022	45.00
SO	000005		INV000045		1/9/2019	0.00
SO	000008		INV000046		1/19/2019	585.00
SO	000009		INV000046		1/19/2019	585.00
SO	000010		INV000047		1/19/2019	2,650.00
SO	000011		INV000047		1/19/2019	2,650.00

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Lesson Summary

In this lesson, you have added redirection links to the Order Nbr. and Invoice Nbr. columns. You have learned how to implement redirection by using actions and exceptions.

Lesson Summary





Part 2: The Payment Info Tab

Lesson 2.1: Add the Payment Info Tab

Learning Objectives

As you complete this lesson, you will learn how to display data from multiple DACs by using the PXProjection attribute.

Figure: The Payment Info tab preview

NOTES FILES CUSTOMIZATION TOOLS ▾

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Order Nbr.:	<input type="text" value="<NEW>"/>	* Customer ID:	<input type="text"/>	Order Total:	0.00
Status:	On Hold	* Service:	<input type="text"/>	Invoice Nbr.:	<input type="text"/>
* Date Created:	6/25/2021 ▾	* Device:	<input type="text"/>		
Date Completed:	<input type="text"/>	Assignee:	<input type="text"/>		
Priority:	Medium ▾	Description:	<input type="text"/>		

REPAIR ITEMS LABOR **PAYMENT INFO**

Invoice Nbr.:	<input type="text"/>
Due Date:	<input type="text"/>
Latest Payment:	<input type="text"/>
Latest Amount Paid:	0.00

Figure: The Payment Info tab

Repair Work Orders

000001 - Battery Replacement

NOTES FILES CUSTOMIZATION TOOLS ▾



Order Nbr.:	<input type="text" value="000001"/>	Customer ID:	<input type="text" value="C000000001 - Jersey Central Office Equi"/>	Order Total:	<input type="text" value="40.00"/>
Status:	<input type="text" value="Completed"/>	Service:	<input type="text" value="BATTERYREPLACE - Battery Replaceme"/>	Invoice Nbr.:	<input type="text" value="INV000049"/>
* Date Created:	<input type="text" value="3/3/2022"/>	Device:	<input type="text" value="NOKIA3310 - Nokia 3310"/>		
Date Completed:	<input type="text" value="4/12/2022"/>	Assignee:	<input type="text" value="Becher, Joseph"/>		
Priority:	<input type="text" value="Low"/>	Description:	<input type="text" value="Battery replacement, Nokia 3310"/>		

REPAIR ITEMS LABOR **PAYMENT INFO**

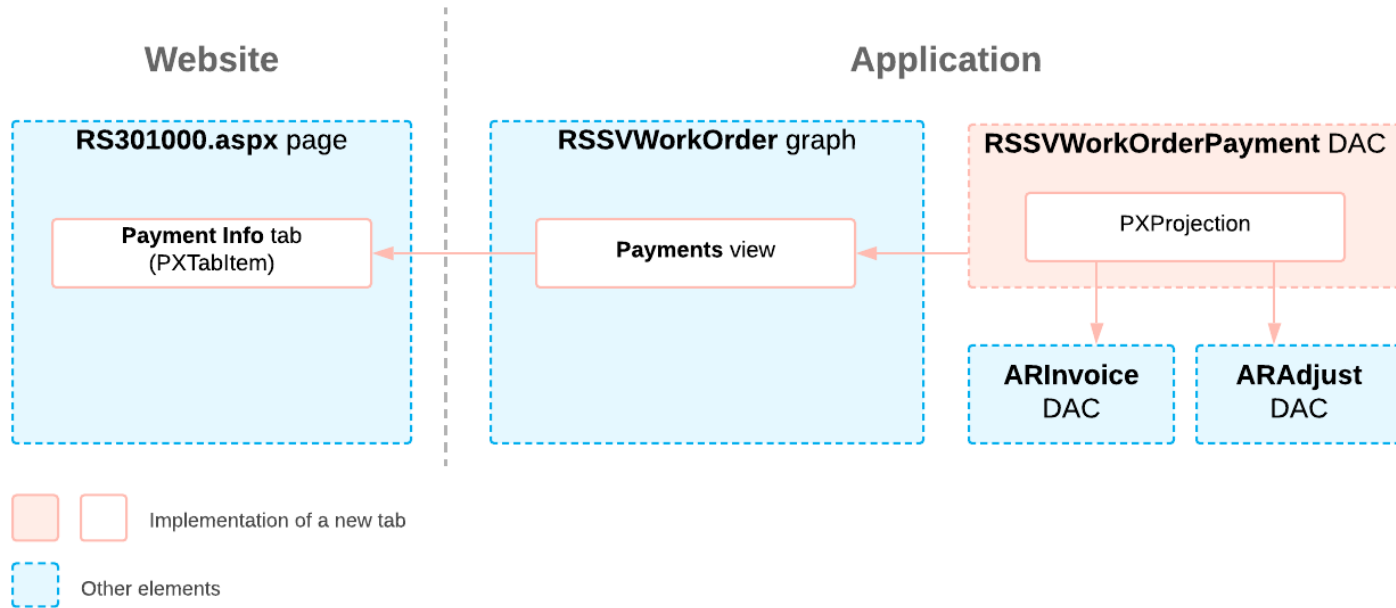
Invoice Nbr.:	<input type="text" value="INV000049"/>
Due Date:	<input type="text" value="5/12/2022"/>
Latest Payment:	<input type="text" value="000002"/>
Latest Amount Paid:	<input type="text" value="10.00"/>

Lesson Summary

In this lesson, you have learned how to display information from multiple DACs on a single tab. To do this, you have defined a new DAC with the PXProjection attribute, and specified the BqlField property value for each field of the new DAC.

Lesson Summary

Implementation of a New Tab



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Thank you

**Vidhyalakshmi
Hariharasubramanian**