



## 15 Minute Tip Talk – April 10, 2018

### Intro to Formatted Search

#### Background

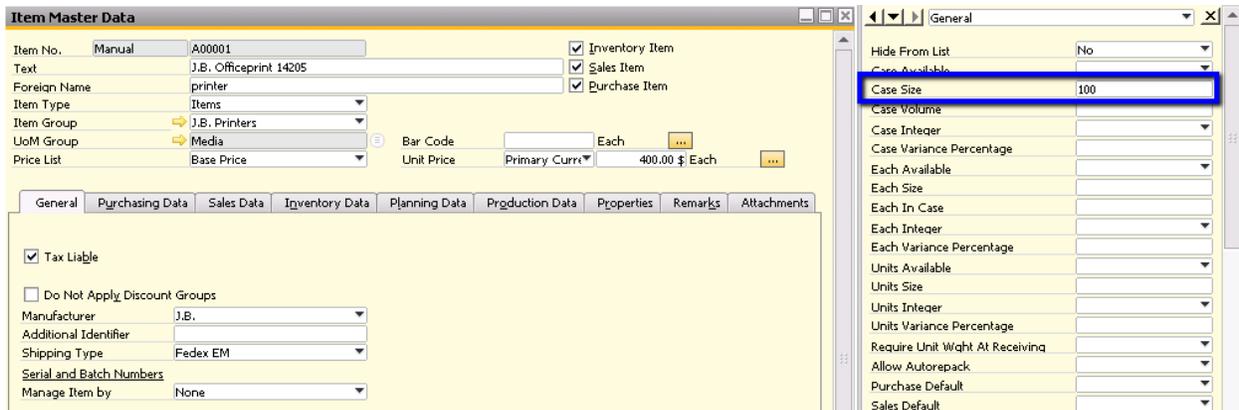
Have you ever wanted to populate a data in a marketing document according to a specific logic? Formatted searches are particularly helpful if you have data in a specific module or table and would like to display it elsewhere. Formatted searches can also help reduce redundant data entry when you know that a particular input must generate a specific output. The following will guide you through the steps for creating a formatted search.

#### Sample

In our example, we would like to populate the Case Size column of a Sales Order with the Case Size value in the Item Master Data.

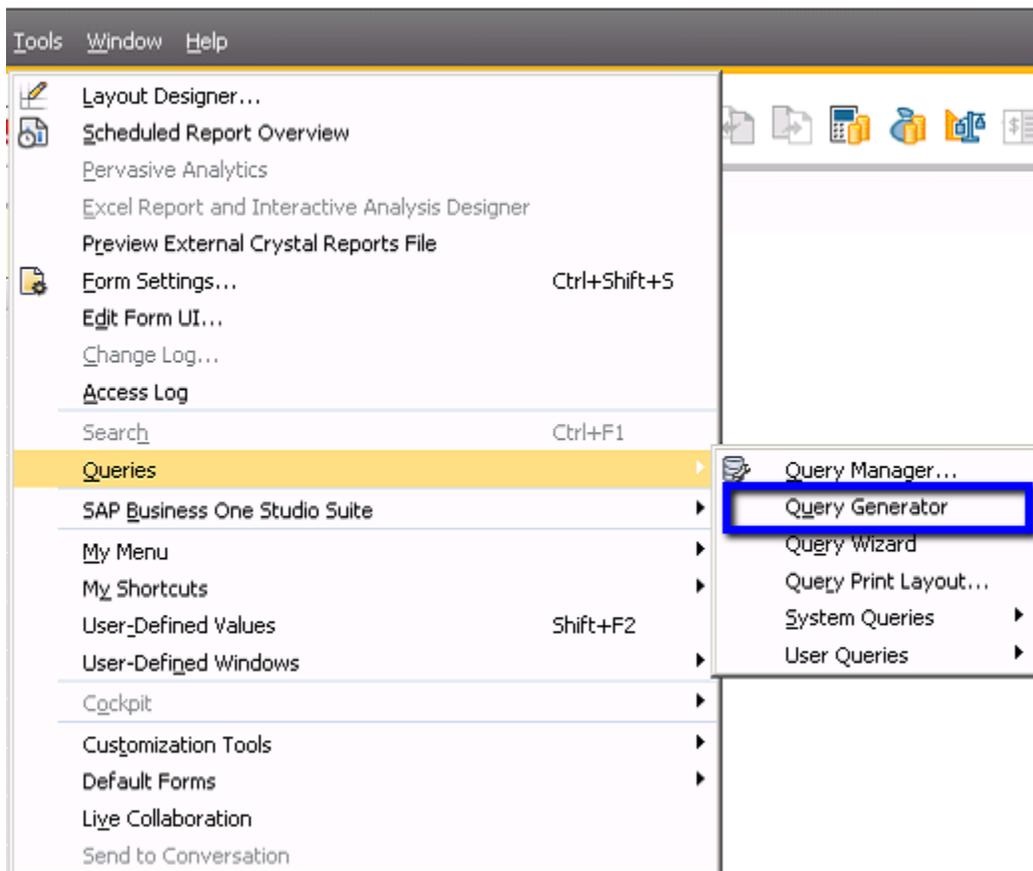
The screenshot shows a "Sales Order" form with several input fields at the top: Customer, Name, Contact Person, Customer Ref. No., and Local Currency. Below these are tabs for Contents, Logistics, Accounting, and Attachments. A table is displayed below the tabs, with a dropdown menu for "Item/Service Type" set to "Item". A blue arrow points to the "Case Size" column header in the table. The table has columns for #, Item No., Item Description, Case Size, Quantity, Unit Price, Disc..., and Tax C... The first row shows a quantity of 1 and a discount of 0.000.

#	Item No.	Item Description	Case Size	Quantity	Unit Price	Disc...	Tax C...
1						0.000	

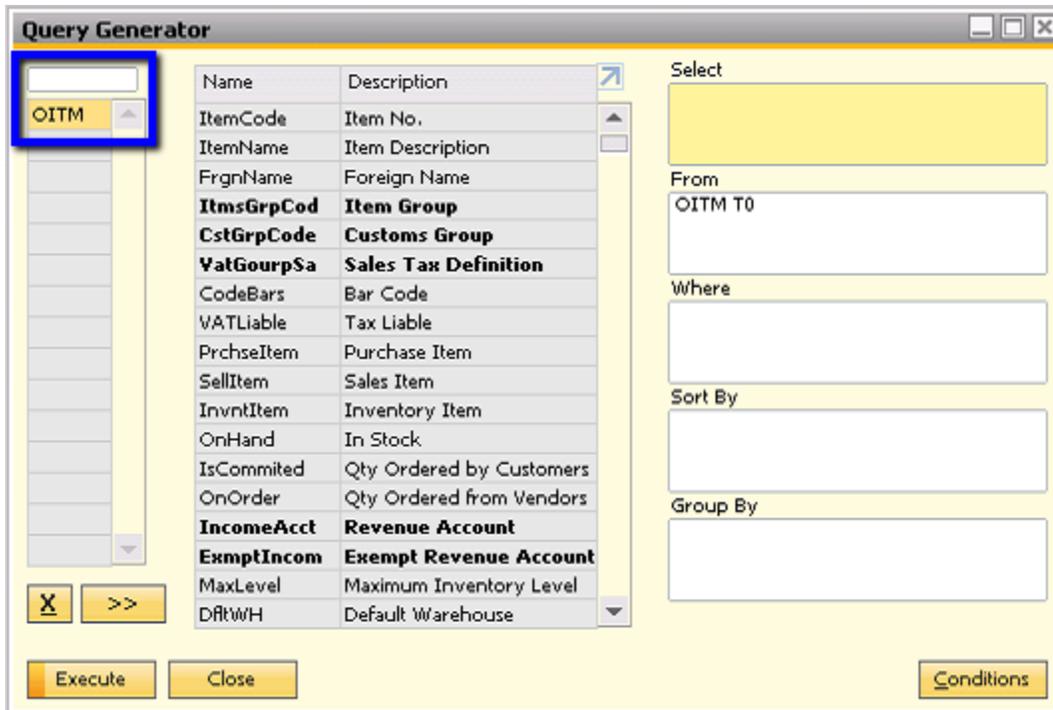


## Creating a Query

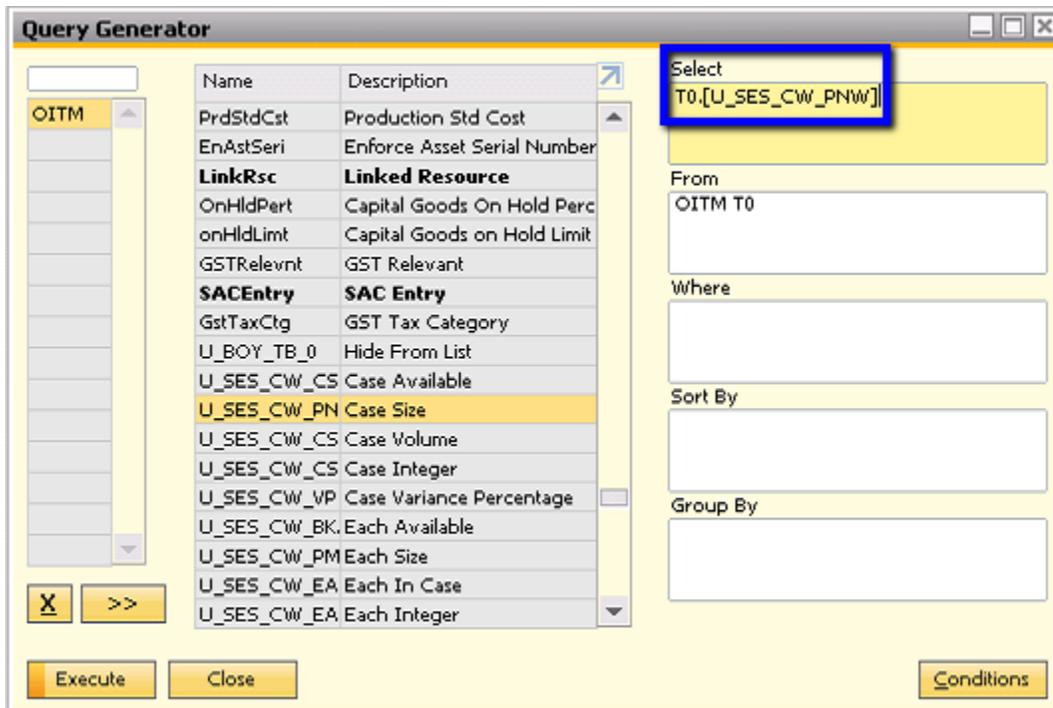
Most of the time, the formatted searches you will use will require a query. We must create a query and save it under Tools > Queries > Query Manager. We can simplify the process of writing queries using the Query Generator under Tools > Queries > Query Generator:



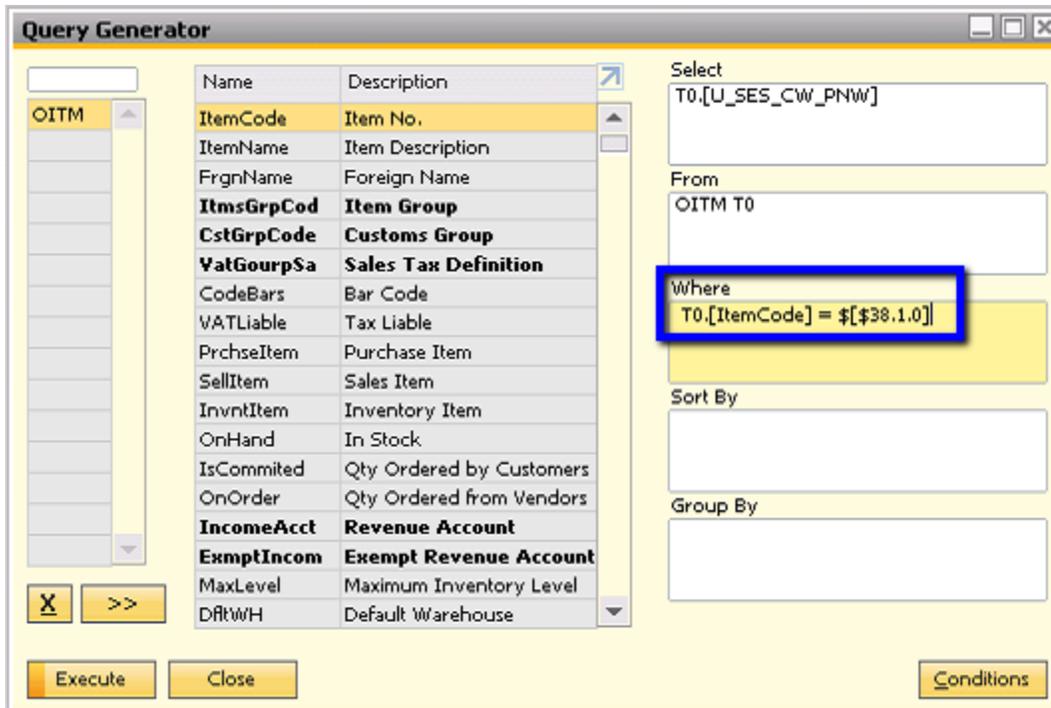
Because we want to select the Case Size from the Item Master Data, we will choose the OITM (Item Master Data table):



We would like the formatted search to generate the Case Size so we will double click the Case Size field (U\_SES\_CW\_PNW) while the cursor is on the Select field:



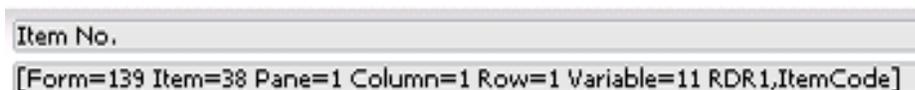
Finally we need to input the restricting condition, so that the query searches for the case size field when the item code in the item master data is equal the item code in the sales order:



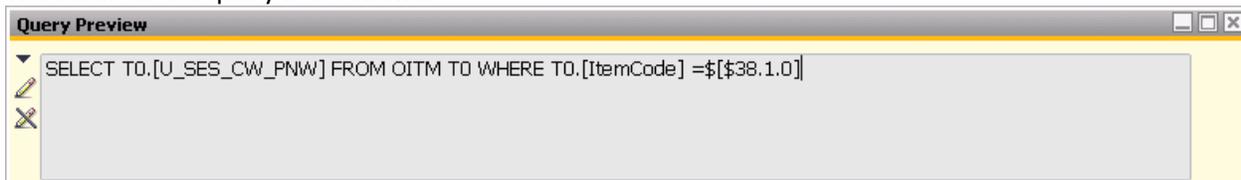
The reason we use dynamic syntax (such as ``${$38.1.0}``) in this case instead of the field name is that the base value is still on the form, rather than the database. SAP Business One provides two different syntaxes for a formatted search query:

- ``${tablename.fieldname}``
- ``${$item.column.number/currency/date/0}``

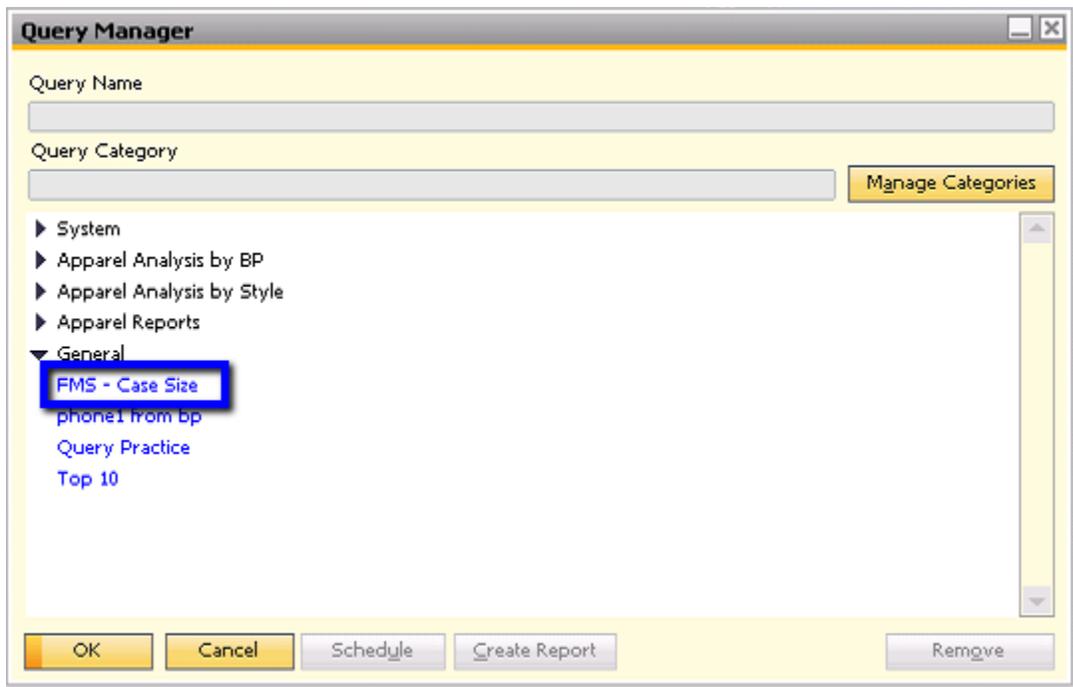
The above values can be found by activating System Information and hovering the cursor over the field you would like information on:



The result of the query is as follows:

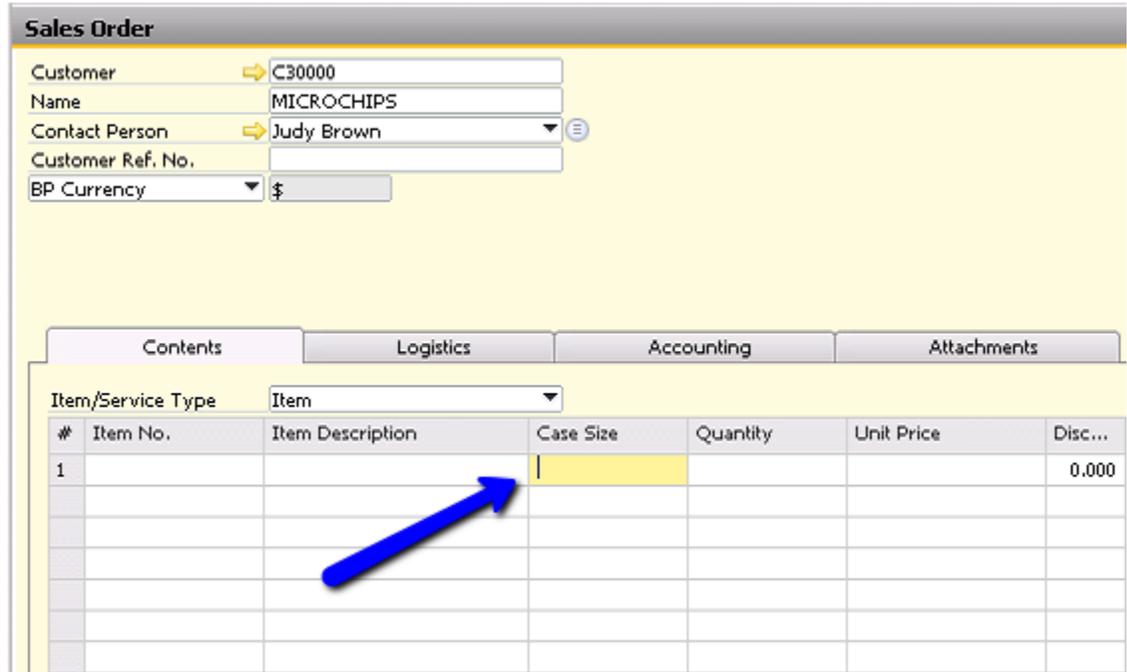


You should save the query in an accessible location in Query Manager:

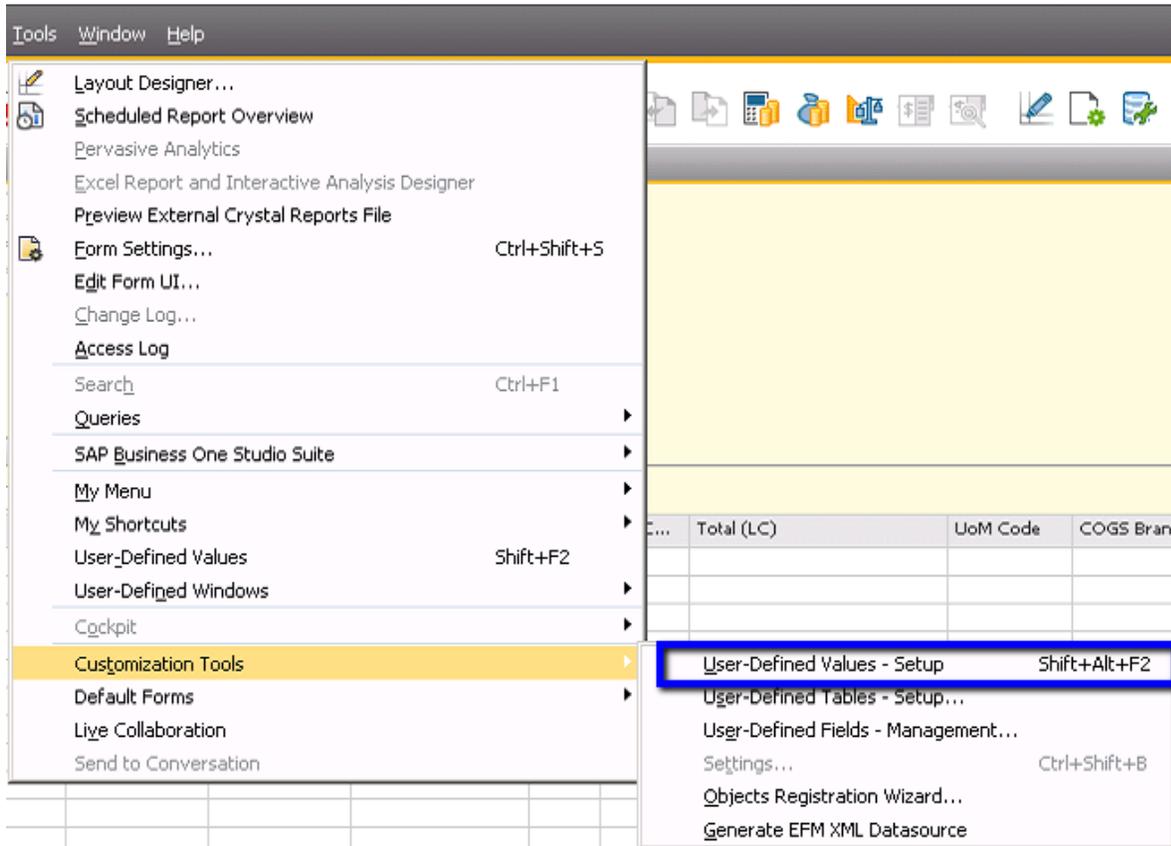


**Creating the Formatted Search**

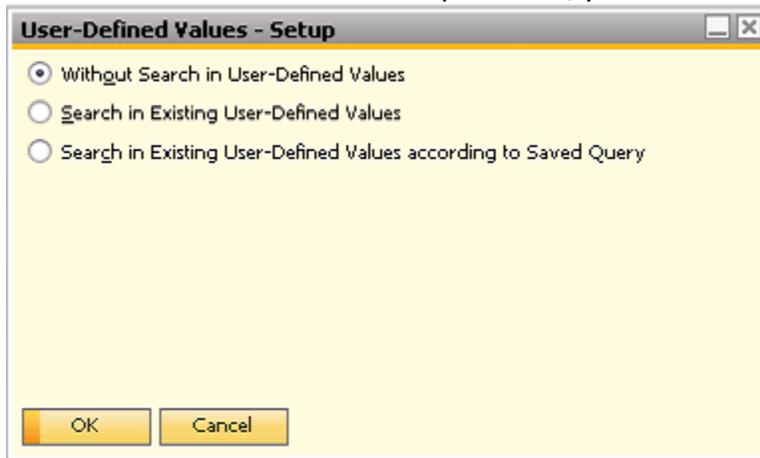
After creating the query, we will now create the formatted search in the desired field. We will open a Sales Order and place the cursor in the Case Size column:



After making sure the cursor is active in the Case Size column, we will navigate to Tools > Customization Tools > User-Defined Values – Setup ( alternatively, you can also press Shift + Alt + F2).



In the User-Defined Values – Setup window, you will have options as follows:

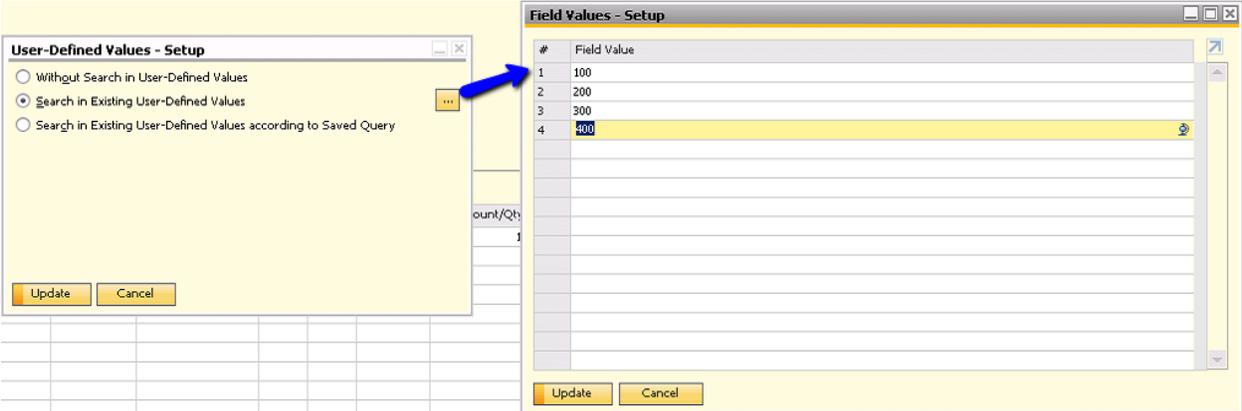


Option	Description
Without Search in User-Defined Values	Use this option to cancel previously defined user defined values.
Search in Existing User-Defined Values	Enables the user to select from a static list of predefined values.

Search in Existing User-Defined Values according to Saved Query	Enables one of the following: <ul style="list-style-type: none"> <li>• The user to select from a list of values derived from a query.</li> <li>• The system to set the field value automatically based on the result of a query.</li> </ul>
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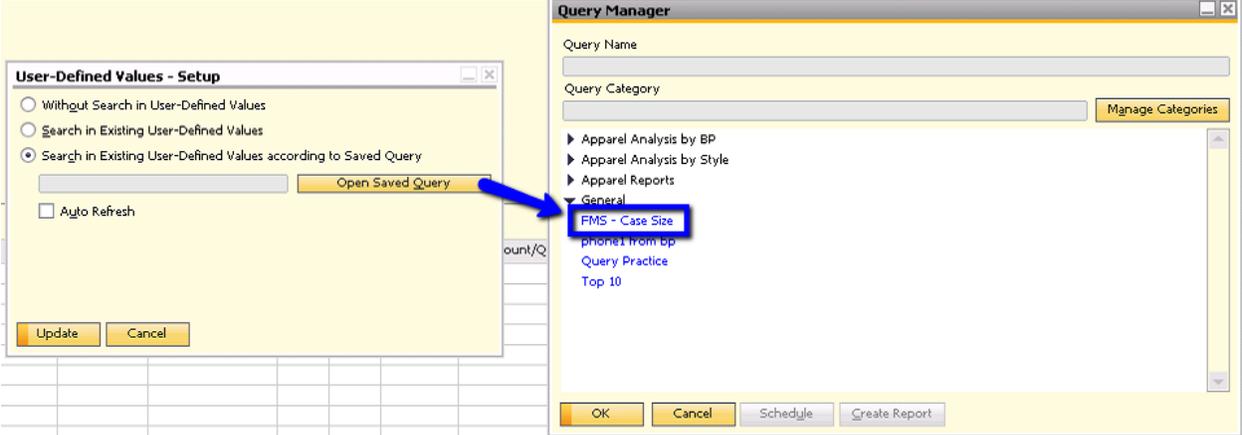
*Search in Existing User-Defined Values*

When you choose to Search in Existing User-Defined Values, you can press the  button to set up the static values:



*Search in Existing User-Defined Values according to Saved Query*

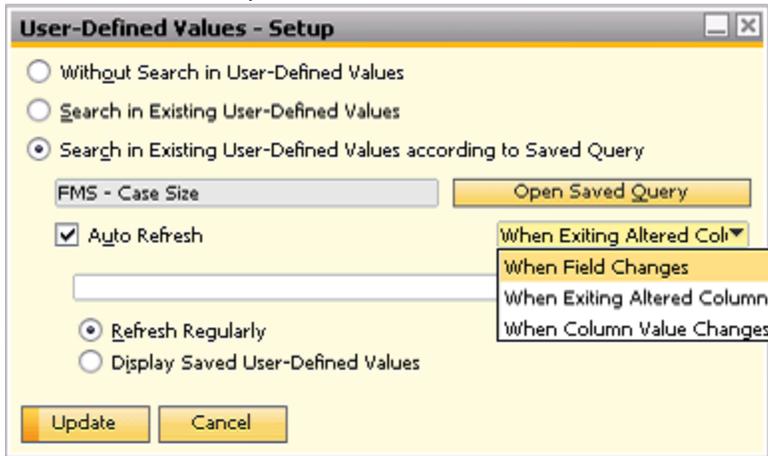
When you choose Search in Existing User-Defined Values according to Saved Query, you can press the Open Saved Query button to navigate to the query you saved for the FMS:



Click OK to map the query to the formatted search.

*Auto Refresh*

You have several options for Auto Refresh



The option you should choose will depend on whether the trigger field is a title field or a row field. If the trigger field is a title field, you should select When Field Changes. If the trigger field is a row field, you should select When Exiting Altered Column or When Column Value changes. Because our trigger value is the item code, we will choose When Exiting Altered Column.

You have the option to Refresh Regularly or Display Saved User-Defined Values. The following highlights the differences:

Field	Description
Refresh Regularly	Reruns the query each time you open or browse to a document, or display the window. Note that: <ul style="list-style-type: none"> <li>• If you manually change a value set by a user-defined value query and save the document, the next time you display the document, the query is rerun and the value reset, which may not be the intended behavior.</li> <li>• Each time you browse to a document, all user-defined value queries in the document are activated, possibly causing the document to be displayed slowly.</li> </ul>
Display Saved User-Defined Values	Runs the query only when a value is manually changed in the trigger field. When browsing documents, the query is not automatically run for existing documents and the form displays the value saved in the field when the document was added or last updated – that is, the value saved in the database.

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