Extended Shipment Entry

Productivity Tools' Web Screen customizations add several enhancements to the standard Sage 300 Shipment Entry Web Screen.

• SmartFinders to find customers, orders, and ship-to locations fast.

Productivity Tools SmartFinders work like Internet search engines – automatically matching the search strings to multiple fields in the Sage 300 customer, order, and ship-to location records.

• Customer optional fields on the Shipment Entry Customer tab.

You can customize the list of optional fields displayed in Shipment Entry using the Options program for Productivity Tools on the Sage 300 Desktop.

• Option to require PO numbers on shipments for all or selected customers.

You select the option for requiring PO numbers on shipments in the Productivity Tools Options program on the Sage 300 Desktop.

You can also select a customer optional field to specify which customers require PO numbers.

For example, you can add a "Yes/No" type customer optional field called "Requires PO Number" to A/R customer records, and set the field value to "Yes" for specific customers.

Click the following links for details on customization features for the Shipment Entry Web Screens:

Customer Number SmartFinder Order Number SmartFinder Ship-To Location Code SmartFinder Editing Columns in SmartFinder Grids Customer Optional Fields Require Purchase Order Number on Shipments

Customer Number SmartFinder

Click the Customer Number field name to open the SmartFinder for searching customers.

/E Transactions : Order Entry S	hipment Entry Invoice	e Entry Cred	it/Debit Not	e Copy O	rders			
)/E Shipment Entry						Oj	ptions 🏠	Create New
ipment Number		Complete Sta	atus					* Required
** NEW ***	↓ Q	Incomplete			Summary			
voice Number		Entered By			Number of S	Shipments	0	
					Number of L	_ines	0	'
Istomer Number *) ≡	Customer Name				Shipment S	ubtotal	0.00	
+ + Q								
								×
Select Custor	ner						Options 🏠	^
Search			4]				
Customer Number	Name	Status	On Hold	Short Name	National Account	Street 1	Street 2	
1100	Bargain Mart - San Diego	Active	No	BMT-SD	BARMART	Bargain Mart Plaza	Corner 182.	

Productivity Tools Web Screens for Sage 300cloud Copyright © 2009-2022 TaiRox Software, Inc. All rights reserved. • Enter part of a customer name or address (or contact phone or email address) and press the Tab or Enter key – or click the "-" button at the end of the Search field.

For example, enter "ron los" to find Ronald Black in Los Angeles.

Select Custome	ər						Options 🗘
Search ron los			L+				
Customer Number	Name	Status	On Hold	Short Name	National Account	Street 1	Street 2
1200	Mr. Ronald Black	Active	No	BLACK		2820 Wabash Road	*

• Double-click the customer to select it and return to the Shipment form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

Search notes:

• The SmartFinder automatically searches through multiple customer fields and displays all customer records containing the search terms.

If one customer record has "Royal" in the customer name field, and another has it in the address field, both records will be displayed.

- Use multiple words in the search field. Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
 Enter "ron los" to find "Ronald" in "Los Angeles".
- Search doesn't care about the word order or intervening words.
 - Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- Enter the phone number segments separated by blanks. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".

Order Number SmartFinder

Click the Order Number field name to open the SmartFinder for searching orders.

Shipment Number *** NEW *** nvoice Number Customer Number * = Cu	← Q istomer Name	Complete Statu Incomplete Entered By	S	Summary Number of Sh Number of Lin Shipment Sut	nes	0 0 0.00
1200 ← + Q M Shipment Customer Taxes Order Number ≡	Ar. Ronald Black Optional Fie			tais	From Multip	le Orders 😑
Select Order Search			[ب	Include On Hold		□ × Options ✿
III Edit Columns						

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- Enter part of a name, address, date, etc. and press the Tab or Enter key or click the "-" button at the end of the Search field.
- Double-click an order to select it and return to the Shipment form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

Search notes:

• The SmartFinder automatically searches through multiple order fields and displays all orders containing the search terms.

If one order has "Royal" in the customer name field, and another has it in the address field, both orders will be displayed.

- Use multiple words in the search field. Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
 Enter "ron los" to find "Ronald" in "Los Angeles".
- Search doesn't care about the word order or intervening words.
 Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- Use the "Include On Hold" checkbox to search for on-hold orders.
- Enter the phone number segments separated by blanks. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".
- Dates are stored as YYYYMMDD (20201231 for Dec 31, 2020). You can enter 2020 to find orders with dates in 2020.

Ship-To Location Code SmartFinder

Click the Ship-To Location Code field name to open the SmartFinder for searching ship-to locations.



The program displays all Ship-to locations for the current customer.

• Enter part of a name or address (or contact phone or email address) and press the Tab or Enter key – or click the "-" button at the end of the Search field.

You can find a specific ship-to address by entering some information about the location, such as the address, city, state, phone number, email, contact name. etc.

Select Ship-To	Location						Options 🕻
Search Los			4				
Customer Number	Ship-To Location	Name	Status	Street 1	Street 2	Street 3	Street 4
1200	HOME	Home office	Active	12 Elegant Drive			

• Double-click the ship-to location to select it and return to the Shipment form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

Search notes:

• The SmartFinder automatically searches through multiple ship-to location fields and displays all records containing the search terms.

If one ship-to location record has "West" in the city name field, and another has it in the address 1 field, both records will be displayed.

- Use multiple words in the search field. Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
 - Enter "jeff los" to find "Jefferson Boulevard" in "Los Angeles".
- Search doesn't care about the word order or intervening words.
 - Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- Enter the phone number segments separated by blanks. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".

Editing Columns in SmartFinder Grids

You can change the order of columns in SmartFinders, and add or remove columns from the grids. Note that SmartFinders will continue to search on key fields, even if you remove them.

You can edit grid columns by dragging and dropping the columns to new locations or by clicking the Edit Columns button, then selecting and moving columns in the Edit Columns popup dialog.

The program saves all column changes when you close the SmartFinder, and you can restore default settings using the Restore Table Defaults link at the bottom of the Edit Columns popup.

SmartFinder column settings are <u>entity</u> **specific.** This means that if you change the settings for the customer SmartFinder on the Shipment Entry screen, the changes will appear for *all* customer SmartFinders. (Customers, Vendors, Ship-To Locations, Orders, Shipments, etc. are different entities.)

Dragging and Dropping SmartFinder Columns

Drag and drop works as you would expect: just left-click on the SmartFinder column heading, hold down the mouse button, and drag the heading to a new location.

Select Cus	stomer					Options 🛱
Search			4			
III Edit Columns	5					
Custo 🚫 Custo	mer Number	Phone	National Account	Street 1	City	State/Prov.
1100	Bargain Mart - San Diego	(408) 451 - 8981	BARMART	Bargain Mart Plaza	Anytown	CA
1105	Bargain Mart - Oakland	(408) 451 - 8981	BARMART	Bargain Mart Plaza	Anytown	CA
1200	Mr. Ronald Black	(213) 555 - 0274		2820 Wabash Road	Los Angeles	CA

Editing SmartFinder Columns Using the Edit Columns Popup Dialog Box

To edit Columns with the Edit Columns popup:

• Open the SmartFinder and click the Edit Columns button.

Select Customer						Opt	ions
earch			4				
III Edit Columns Edit Colum	ns	Phone	National Account	Street 1	City	State/Prov.	
All	jo	(408) 451 - 8981	BARMART	Bargain Mart Plaza	Anytown	СА	
:::: 🖌 Customer Number	r	(408) 451 - 8981	BARMART	Bargain Mart Plaza	Anytown	CA	
::: 🗸 Name		(213) 555 - 0274		2820 Wabash Road	Los Angeles	CA	
:::: V Phone		(816) 555 - 3341		927 Warehouse Road	Kansas City	MO	
	-	(917) 555 - 4444		10349 Sherman Crescent	Fairbanks	AK	
Apply (Cancel	(416) 555 - 4799		586 Tanner Road	Toronto	Ontario	
Restore Table D		(804) 555 - 7272		3741 Main Street	Richmond	VA	
	tepnen Kersnaw	(804) 555 - 3372		4730 112th Street	Richmond	VA	
1550 Astra	I Construction Co Ltd.	(512) 555 - 9192		418 Canal Drive	Austin	ТХ	

- Use the checkboxes to add or remove columns.
- Drag and drop columns to new positions in the list. The cursor changes to the "drag" cursor shown on the right.
- Click the Apply button when you are satisfied with your changes, or click the Cancel button to close the popup without saving new settings.
- Click Restore table defaults to return the grid to the default column settings.



Customer Optional Fields

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/R customer record on the Customer tab of the Shipment Entry screen.

sag	je 300	🔒 Session Date: Apr 27, 20	21 Administrator 🔹	Sample Company Ltd.	Q Search He	elp Settings	7 Tools
	Shipment Customer Taxes Optional Fields Sales S	plit Rates Totals					۶ ۲
₩Ξ	Ship-Via Code Ship-Via Description						5
÷				— ———————————————————————————————————			<u>í.</u>
	Customer Type Shipment Tracking Number	Free On Board Point		Territory CA			à
血	Price List Price List Description						
<u> </u>	USA						- 1
	Tax Group Tax Group Description		Tax Reporting Currency				- 1
-	CALIF 🔶 Q California State Tax Group		USD				- 1
*	Customer Account Set Customer Account Set Description						- 1
8	USA 🔎 Q Accounts Receivable, Other						- 1
	Terms Code Terms Description						- 1
	DUETBL						. 1
*	Optional Field Optional Field Description	Value	Val	ue Description			
2	REQPONUM Requires PO Number on Orders & Shipments	Yes				*	
	CREDTWARNING Customer Credit Warning	No					
	PREFERCUST Preferred Customer	Yes					
	NOTE Note DISCNTGRACE Discount Grace Period	Allow greater volume discour	it			_	
	DUEDATEPRD Due Date Grace Period	10					
						-	
	Page 1 of 1 F				1 - 6 0	of 6 items	
				Prepayment H	istory	Post	

This lets you view notes concerning the account during data entry, and also view ahipment requirements listed in optional fields – in this example, one of the fields shows that the customer "Requires PO Number on Orders and Shipments."

You specify which optional fields to display on the Order Entry and Shipment Entry screens in the Productivity Tools Options program on the Sage 300 Desktop.

Require Purchase Order Number on Shipments

Productivity Tool's Extended Shipment Entry includes an option to force users to include purchase order numbers on order and shipments for all or for selected customers. You select this option in the Productivity Tools Options program on the Sage 300 Desktop.

- The program lets you require PO numbers for all customer orders and shipments or only for customers that have a "Yes" value for a specific optional field (for example "Requires PO Number").
- If a customer record does not include a value for the Yes/No optional field, the program will **not** require a purchase order number when you create an order or shipment.

In the following example, the program uses the Yes/No value in Optional Field "REQPONUM" (with a description "Requires PO Number on Orders and Shipments") to determine whether customers require a PO number.

• You choose the option and the optional field in the Productivity Tools Options program on the Sage 300 Desktop:

SAMLTD - Options				-		×
<u>F</u> ile <u>H</u> elp						
Menu Item Quantities Order Entry						
Order/Shipment Must Have a Purc Leave the Customer Optional Field bla Optional Field name to control this opti	nk if a Purchase Order Nur	Customer Optional Field nber is required for all custon	REQPONUM mers. Select a Y		Custome]Q r
Order/Shipment Customer Optional F	ields To Display					
PROSPECT Rental Customer	Include ->	Requires PO Number on C Customer Credit Warning	Orders & Sł	<u>U</u>	<u>l</u> p	
SIC Code Temporary Customer	<- <u>E</u> xclude	Preferred Customer Note		<u>D</u> o	wn	

 If you use the option to force PO numbers on orders and shipments – and the customer record includes the control field with a "Yes" value – the following message appears when you try to post a shipment that's missing the PO number (unless the shipment is for an existing order).

O/E Transactions : Order Entry Shipment Entry Invoice Entry Credit/Debit Note Copy Orders		۶ د
O/E Shipment Entry	Options 🏠 Create Ne	w 🗔
Obiented Number	* Rec	quired
Shipment Number Complete Status Summary ••• NEW ••• •• Q Incomplete		a
Invoice Number Please correct the following issue(s): Purchase Order Number cannot be blank.]	
Customer Number * E		
1200 + Q Mr. Ronald Black		
Shipment Customer Taxes Optional Fields Sales Split Rates Totals		_
Order Number *		
Template Code Shipment Date Posting Date Fiscal Year/Period Expected Ship Date ACTIVE Image: Constraint of the state		

• In this example, the "Requires PO Number . . ." field also appears on the Customer tab in Shipment Entry.

Optional Field	Optional Field Description	Value	Value Description
REQPONUM	Requires PO Number on Orders & Shipments	Yes	
CREDTWARNING	Customer Credit Warning	No	
PREFERCUST	Preferred Customer	Yes	
NOTE	Note	Allow greater volume discount	
DISCNTGRACE	Discount Grace Period	20	
DUEDATEPRD	Due Date Grace Period	10	
AC	AC#	1200	
Page 1 of	1 🕨 🗏		1 - 7 of 7 items

Note that the field appears on the customer tab if:

- It has been added to the Customer record in A/R.
- It was added to the set of optional fields that are displayed in Shipment Entry (using the Productivity Tools Options program).