

TaiRox™ Memo

A Comprehensive Guide to Sage 300 Optional Fields

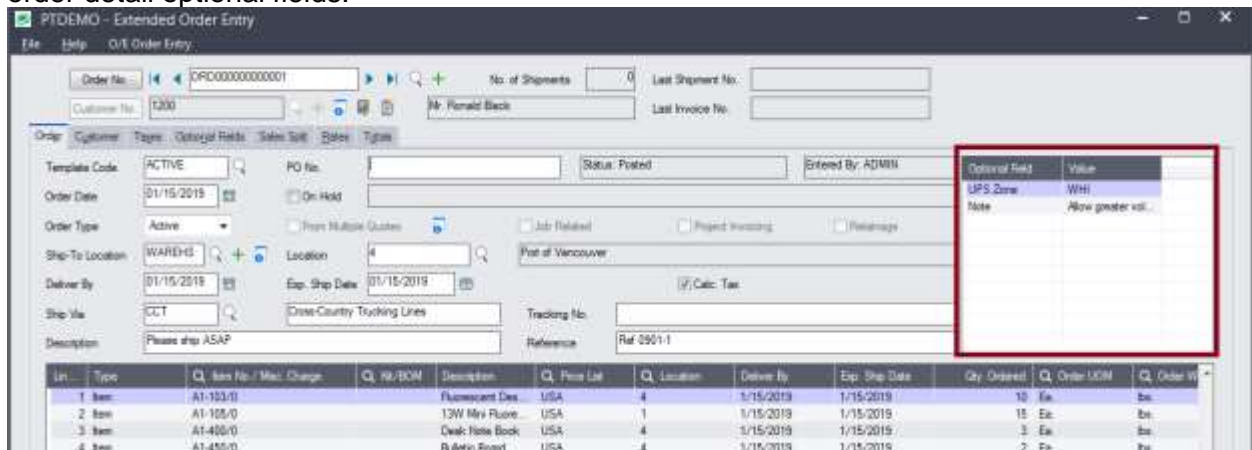
Realizing the Full Potential of Optional Fields

Sage 300 optional fields can store all kinds of accounting-related data. The data can be stored in all types of transactions. The data flows from one transaction type to another. So far, so good. However, when put into practice, optional field usage often faces these challenges:

- **Visibility:** A user doesn't see the optional fields displayed when and where a user wants to see them. Navigation to a different screen, tab or pop-up is required.
- **Visibility:** For operations that support searching and sorting entries, searching or sorting by an optional field may not be supported.
- **Programming:** For a complete solution, a user wants some behavior to be controlled by optional fields. Additional programming, even if only a tiny amount of programming, is required.
- **Management:** Setting up an optional field for an entity like a customer, even if the optional field is required, doesn't put an optional field value into the thousands of customer records. Integrity checking reports these omissions as errors.
- **Management:** It is very common to set up optional fields, put them into practice, and then realize that they should have been set up a different way. It is difficult to remove optional fields correctly and they can hang around, affecting performance and database size.

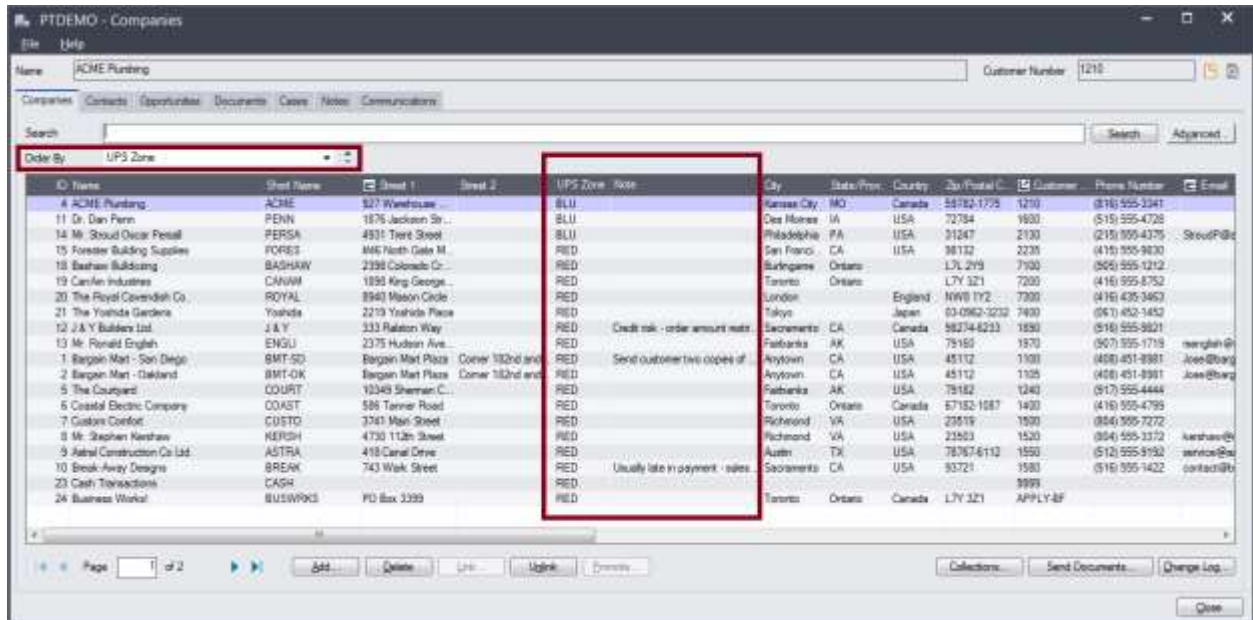
Making Optional Fields More Visible - TaiRox Productivity Tools

TaiRox Productivity Tools is comprised of over 50 different programs that add hundreds of features to Sage 300. Some of these features make optional fields more visible. Suppose you want to see specific information about a customer when entering an order. You have to navigate to another window to see this information. Extended Order Entry will show selected customer optional fields when entering an order. These are customer optional fields, not order header or order detail optional fields.



Making Optional Fields More Visible, Searchable & Sortable - TaiRox CRM & Collections

TaiRox CRM & Collections provides collections and sales features integrated into the Sage 300 desktop and stored in a Sage 300 company database - at a small fraction of the cost for other CRM offerings. When Companies (Customers or Prospects) are displayed, optional field columns appear in the grid and are one of the Order By options. When you type RED into the Search field, internet-like search capabilities will find all entries with an optional field having the value RED, as well as matching against other company fields.

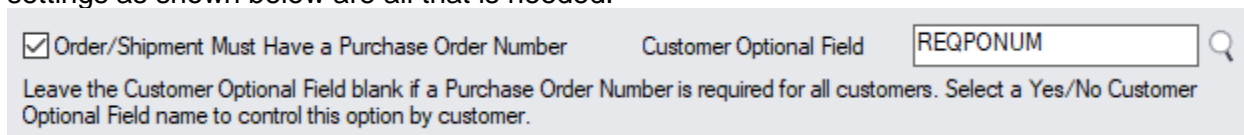


Business Solutions = Data + Programming

Sage 300 optional fields can store all kinds of accounting-related data. The data can be stored in all types of transactions. The data flows from one transaction type to another. However, real-world solutions require programming. In the Sage 300 world, this programming is often built into ISV solutions and controlled by configurable settings - a form of "codeless programming".

A Tiny Case Study in Codeless Programming

Sage 300 will accept orders, with or without a purchase order number. But some companies using Sage 300 want to force users to enter a purchase order on their orders, most of the time. Custom programs or macros can implement this requirement. However, these choices have messy consequences if not done correctly. For a simple-sounding request like this, a few settings as shown below are all that is needed.



The user interface shown is from the TaiRox Productivity Tools product that is built as a full SDK module the adds hundreds of features to Sage 300, some of which involve optional fields. The code beneath these choices implements this logic:

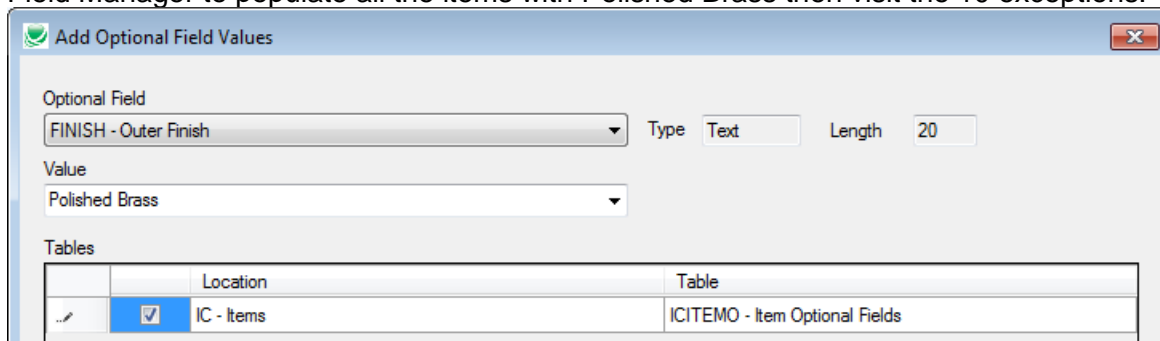
- If the checkbox is not selected, Sage 300 operates as if Productivity Tools is not present.
- Otherwise, if the Customer Optional Field is left blank, then all orders and shipments must have a purchase order number before the order or shipment can be saved.

- Otherwise, if the Customer Optional Field is the name of an optional field and if that optional field exists for that customer and that optional field has a "Yes" value then that order or shipment must have a purchase order entered before it can be saved.
- Otherwise, Sage 300 operates as if Productivity Tools is not present.

This example of a tiny requirement illustrates how the value of optional fields can be magnified by products - without users or implementers forced to write programming code. Whenever possible, TaiRox will do custom work as a product enhancement - when one user needs the functionality, there may be other users with the same need.

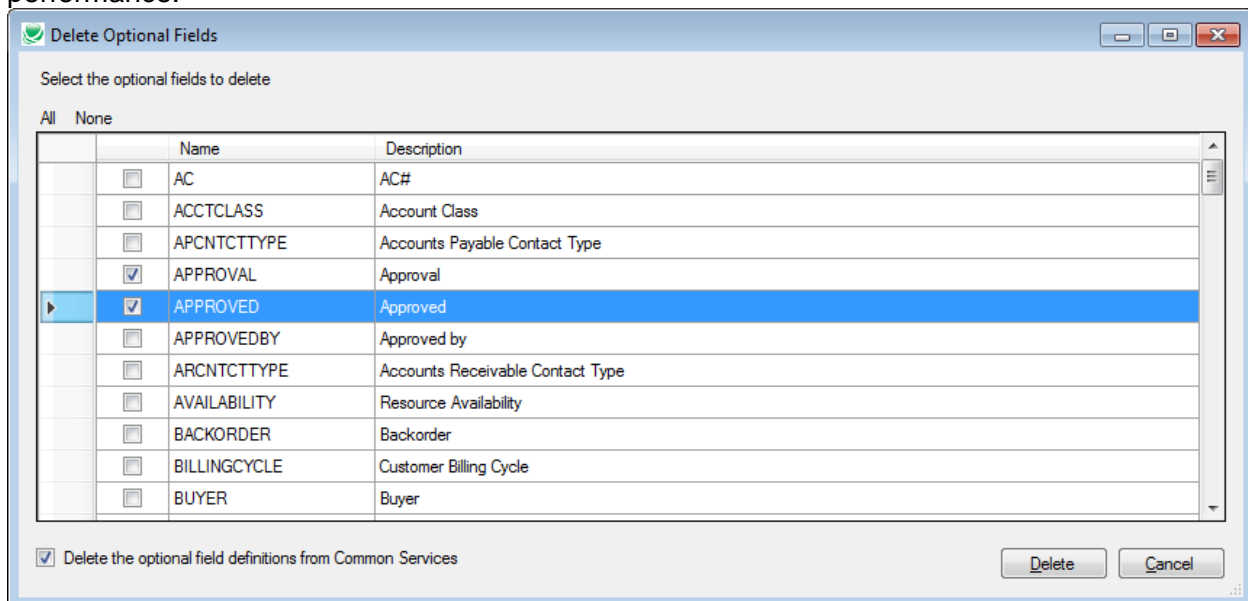
Management: Making Optional Fields Easier to Add - Optional Field Manager

You have just added an optional field "FINISH" to inventory items. Of your 1000 items, 990 have "Polished Brass" as their finish and 10 have a different finish. How do you populate the 1000 optional fields? You can visit every one of 1000 items and add the Optional field or use Optional Field Manager to populate all the items with Polished Brass then visit the 10 exceptions.



Management: Making Optional Fields Easier to Delete - Optional Field Manager

You may decide that you want to get rid of some optional fields. In circumstances where licensing for optional fields has been removed, you may be surprised to see that the lack of a license doesn't mean that the optional fields have been removed. TaiRox has seen order entry detail lines with dozens of optional fields that are not being used and have a significant effect on performance.



Management: Optional Fields and Data Integrity

You can add a "Required" optional field to a customer, vendor, account or many other Sage 300 entities. When you do and run the Sage 300 data integrity checker errors will be reported. The TaiRox Fast Data Integrity program allows you to include or omit these errors.

- You may wish to omit this kind of error until the optional field is fully populated - so that significant errors are not hidden in a list of hundreds or thousands of errors.
- You may not want to add a required optional field to inactive records or records from 5 years ago. Fast Data Integrity allows you to limit error reporting to current data.

