

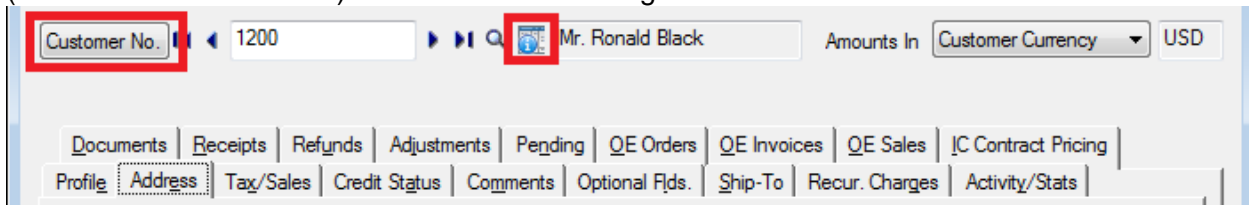
TaiRox Productivity Tools User Guide

Extended Customer Inquiry - Overview

Extended Customer Inquiry provides a convenient way to view data related to a Sage 300 customer. Each tab focuses on an aspect of the customer's data. Extended Customer Inquiry enhances the Sage 300 Customer Inquiry function by:

- A SmartFinder will search for customers like an internet search engine
- Google Maps, Email and Website integration is provided from the Address tab
- Drill-down will launch the TaiRox Extended Customers UI form
- Multiple contacts per customer are shown in the Address tab

The Customer No button provides access to a search function - SmartFinder - that will search multiple columns in both customer and ship-to locations and display all matches - just like a modern search engine. The zoom icon provides access to either TaiRox Extended Customers (if this function is enabled) or otherwise to the Sage 300 Customers function.



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Extended Customer Inquiry - SmartFinder

The SmartFinder form pops-up. Suppose you remember that this customer has something to do with a warehouse. Enter "ware" and click on the Find button. A/R customer rows are shown in the top grid and A/R shipment locations are shown on the bottom grid. You can see that many columns in the database tables are searched simultaneously.

Select a row in the customer grid or ship-to grid and that customer will be selected and you will be returned to the main entry form.

Using multiple words in the search? Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".

Searching for a phone number? Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find entries "(451) 555-8991" as well as "(408) 451-8991".

| Customer Number | Status | Customer Name | Short Name | Address Lin... | Address Line 2 | Address Line 3 | Address Line 4 |
|-----------------|--------|---------------|------------|-------------------|----------------|----------------|----------------|
| 1210 | Active | ACME Plumbing | ACME | 927 Warehouse ... | | | |

| Customer Number | Ship-To Location | Status | Description | Address Lin... | Address Line 2 | Address Line 3 | Address Line 4 |
|-----------------|------------------|--------|--------------------|--------------------|--------------------|----------------|----------------|
| 1105 | EAST | Active | East Oakland W... | 1045 Middle Str... | | | |
| 1105 | WEST | Active | West Oakland ... | 1819 La Jean R... | | | |
| 1200 | WAREHS | Active | Warehouse | Receiving Dock... | Wabash Industri... | | |
| 1210 | A | Active | Receiving Dock A | ACME Receivin... | 927 Warehouse ... | | |
| 1210 | B | Active | Receiving Dock B | ACME Receivin... | 927 Warehouse ... | | |
| 1210 | C | Active | Receiving Dock C | ACME Receivin... | 927 Warehouse ... | | |
| 1500 | MID | Active | Mid-way wareho... | #2211 Mid-way ... | 150 Tasmanian ... | | |
| 1500 | YAM | Active | Yamate Wareho... | #3388 Yamate ... | 3741A Main Street | | |
| 1580 | EAST | Active | Break Away - Ea... | 1802 West Boul... | | | |
| 1580 | WEST | Active | Break Away - W... | 9754 Nigel Road | | | |

Google Maps is launched with the selected address when you click on the right-arrow icon:



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Extended Customer Inquiry - Address

The Address tab show multiple contacts per Customer. The Address1, E-mail, Web Site and Contact Email will launch Google Maps, email clients and browsers. A right-arrow icon in the multiple contacts grid will launch an email client.

The screenshot shows a software window titled "PTDEMO - Extended Customer Inquiry". The window has a menu bar with "File", "Help", and "A/R Customer Inquiry". Below the menu bar, there are search and filter controls: "Customer No." with a value of "1200", a search icon, and a name field containing "Mr. Ronald Black". To the right, there is a section for "Amounts In" with a dropdown menu set to "Customer Currency" and a "USD" button.

Below these controls is a horizontal navigation bar with several tabs: "Documents", "Receipts", "Refunds", "Adjustments", "Pending", "QE Orders", "QE Invoices", "QE Sales", "IC Contract Pricing", "Profile", "Address" (which is selected and highlighted), "Tax/Sales", "Credit Status", "Comments", "Optional Flds.", "Ship-To", "Recur. Charges", and "Activity/Stats".

The main content area is divided into several sections:

- Address Section:** Includes fields for "Address 1" (2820 Wabash Road), "Address 2", "Address 3", and "Address 4". Below these are fields for "City" (Los Angeles), "State/Prov." (CA), "Zip/Postal Code" (90048), "Country" (USA), "Telephone" ((213) 555-0274), and "Fax" ((213) 555-7234).
- Contact Information Section:** Includes buttons for "E-mail" and "Web Site", and fields for "Contact" (Mr. Black), "Contact Phone" (() -), "Contact Fax" (() -), and "Contact E-mail" (ronaldblack99@hotmail.com).
- Contacts Grid:** A table with columns: Last Name, First Name, Title, Position, Phone (Mobile), Phone (Office), and Phone (Other).

| Last Name | First Name | Title | Position | Phone (Mobile) | Phone (Office) | Phone (Other) |
|-----------|------------|-------|----------------|--------------------|--------------------|---------------|
| Black | Donna | Ms | VP Sales | (604) 629-0223 ... | (604) 805-1871 ... | () - |
| White | Bary | Mr | VP Development | (604) 629-1871 ... | () - | () - |
| | | | | | | |

At the bottom of the window, there are "Refresh" and "Close" buttons.