Extended Customers

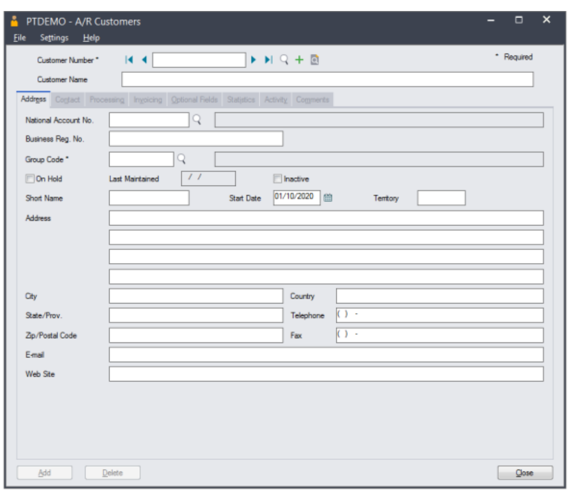
Extended Customers is an enhanced replacement for the Sage Customers form. It provides you with more information while entering a PO and fast access to additional PO, Customer, and Item information.

Extended Customers lets you:

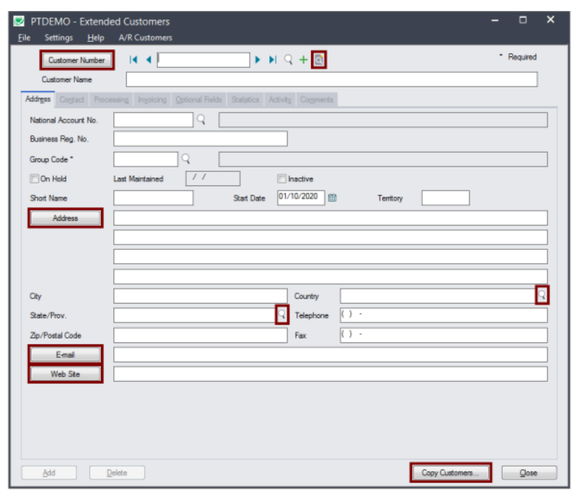
- Maintain customers across multiple Sage 300 companies using the Copy Customers functionality.
    - Specify a range of customers from the current company, filter them by additional criteria, cherry-pick customers from the results, and then copy the final set to other associated Sage 300 companies.
    - Select or de-select companies to copy to on an individual basis.
    - Display a full log of copied customers.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes.
- Use a customer SmartFinder for browser-like customer lookups.
- Add an unlimited number of contacts per customer with over 10 fields of information for each contact.
- Click the Address button to display customer addresses in Google maps.
- Click the E-mail button to create new emails for customer and contact email addresses.
- Click the Web Site button to display customer web sites in a browser.

The following pictures show the extra functionality on the Extended Customers screen:

Sage A/R Customers screen



TaiRox Extended Customers screen



Click the following links for details on each Extended Customers feature:

[SmartFinder – Customers] Find a customer quickly from a name, description, phone number or address.

[Customer Inquiry] (button left of the customer name field) Display complete customer data, including OE Orders, invoices, pricing, tax, credit status, ship-to addresses, recurring charges, etc.

[Address Lookup](#) Display address location in Google Maps.

[E-mail Creation](#) Launch your email client to create an email for this customer.

[Web Site Lookup](#) Launch your browser with the customer's website URL.

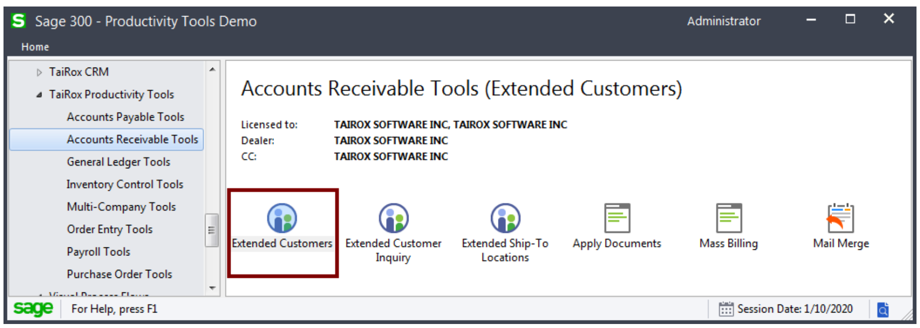
[Enforce ISO 3166 Country Codes](#) Turn on this option to force country, state and province fields to match ISO 3166 codes.

[Multiple Contacts](#) Store an unlimited number of contacts per customer with over 10 fields of information for each contact.

[Copy Customers](#) Copy customers to multiple Sage 300 databases in a single operation. Insert-Only, Update-Only, and Insert-and-Update operations are provided.

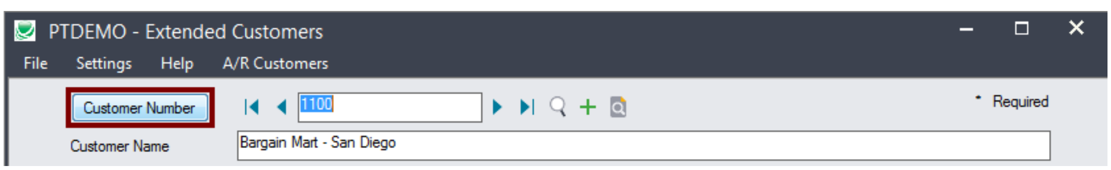
Using Extended Customers

The Extended Customers icon appears under **TaiRox Productivity Tools > Accounts Receivable** Tools on the Sage 300 desktop and can be copied to other menu locations.



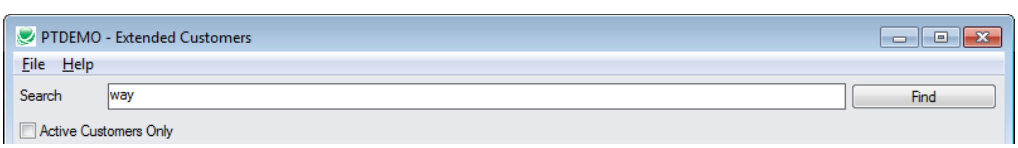
SmartFinder – Customers

Click the Customer Number button at the top of the form to open the SmartFinder for searching customers.



Search:

- Enter one or more words or word fragments in the search entry field to search multiple tables and fields.



- You can also filter for Active customers.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have "way" in the name, where another may have it in the address field. Both records will be displayed.
  - **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 "(451) 555-8991" as well as "(408) 451-8991".

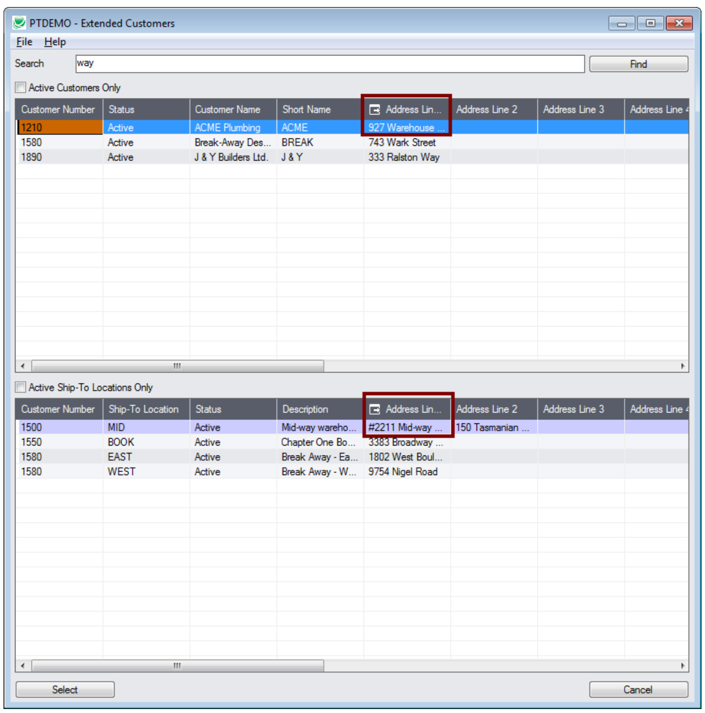
Note:

- ○ *All of the word fragments must be present in one of the fields being searched*. (For example, if you searched for "Ross Blvd", you will not see a customer where "Ross" is in the Customer Name field and "Blvd" is in the Address 1 field.)
- ○ Addresses (e.g. the customer address) are treated as a single field.

Display:

- The top grid displays the customers matching the search criteria.
- The bottom grid displays the ship-to locations that match the search criteria.

  Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen. The screen below displays ship-to locations for three different customers.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the customer address. You can also check the locations of Ship-To addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.



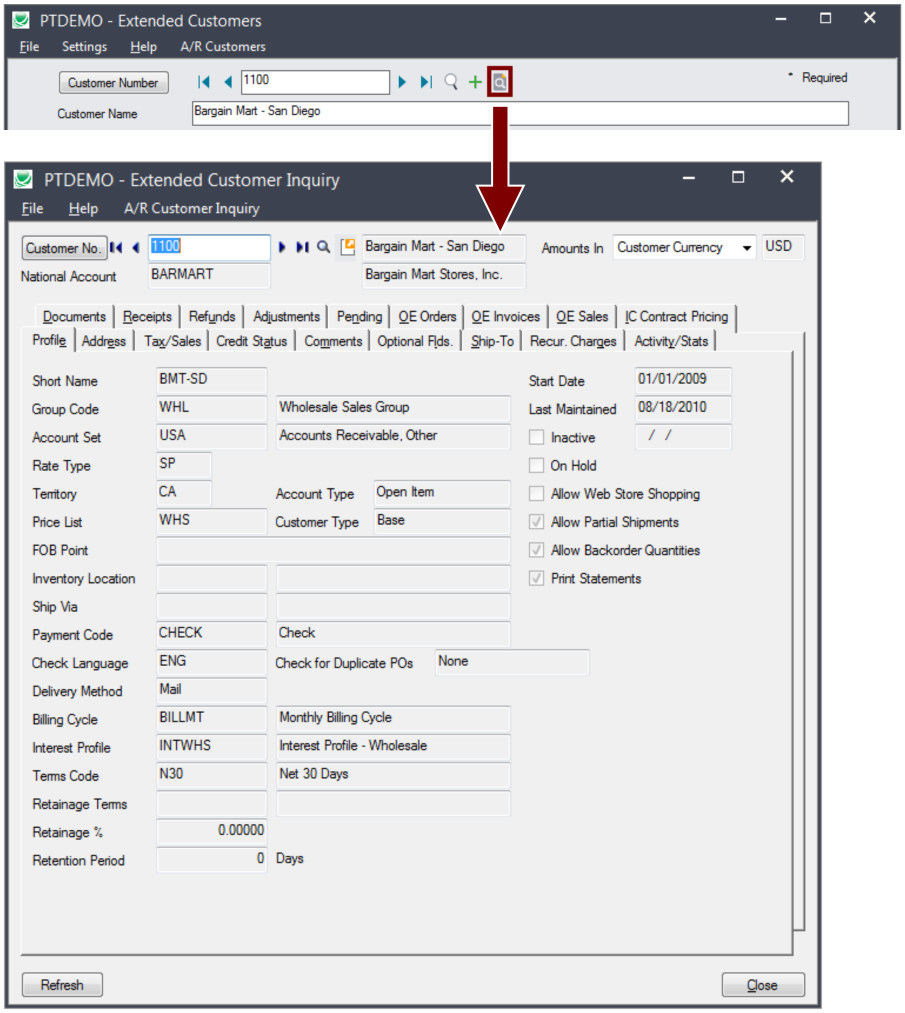
Selection:

- Double-click a customer in the top grid to select and enter the customer on the Extended Customers form.
- Double-click a ship-to location in the bottom grid to enter the customer.

Customer Inquiry

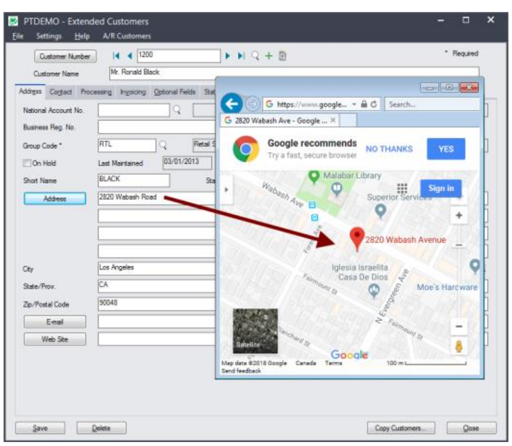
Customer Inquiry button displays the TaiRox Productivity Tools Customer Inquiry screen – a convenient way to view data related to the customer. Each tab focuses on an aspect of the customer's data.

You can also look up details for other customers while you are on this screen.



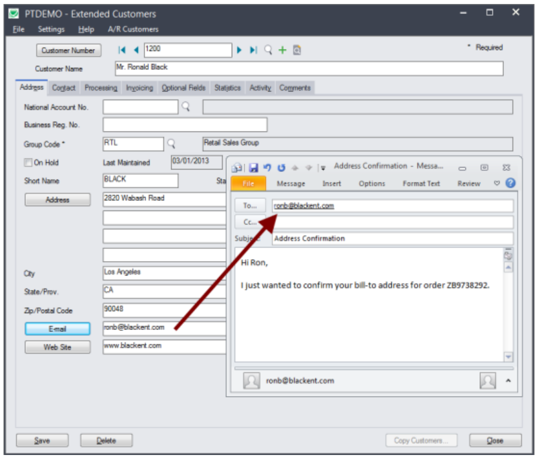
Look up addresses in Google maps

- Click the Address button on the Extended Customers screen to confirm locations.



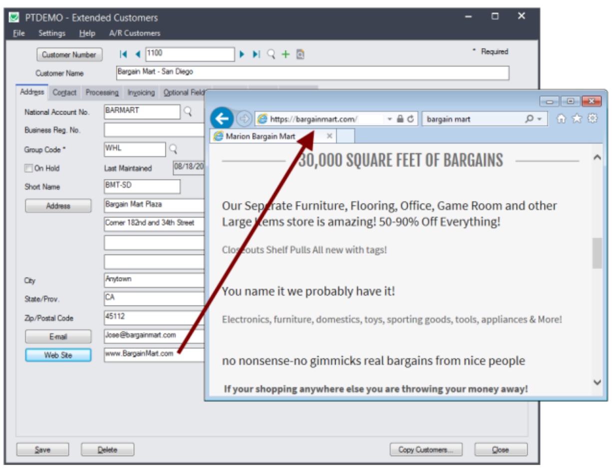
Launch emails for customers and customer contact email addresses

- Click the E-mail button on the Address or Contact tabs to quickly create a new email.



Look up Web sites in your browser

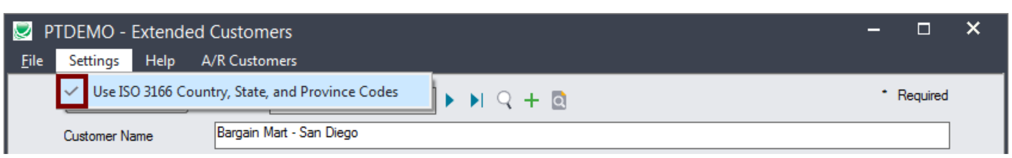
- Click the Web Site button on the Extended Customers screen to confirm Web site URLs.



Enforce ISO 3166 country codes

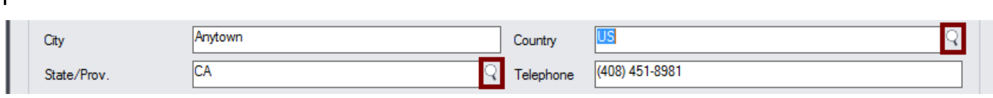
Use this option to force country, state and province codes to match ISO 3166 codes, and to use Finders to select country, state, and province codes.

- This setting can only be changed by the Sage 300 ADMIN.
- Choose Settings from the Extended Customers menu.



  - If you want to use this option, make sure it displays the checkmark.

- The program will also display new Finder buttons to let you select ISO country, state, and province codes from Finder lists.



- An error message will appear when you click Save if the codes are not valid. You must fix them before you can save the customer record.

Maintain an unlimited number of contacts per customer

Extended Customers lets you store an unlimited number of contacts per customer with over 10 fields of information for each contact.

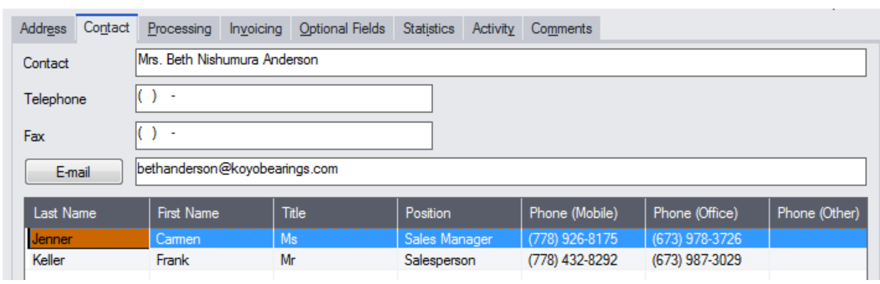
Sage 300 Accounts Payable only stores a single contact for each customer and only stores the contact's name, phone number, fax number, and e-mail address for the one contact.

By contract, Extended Customers allows you to store as many as you require, by providing a list of contacts to the Contact tab of the UI, and it stores the following information for each customer:

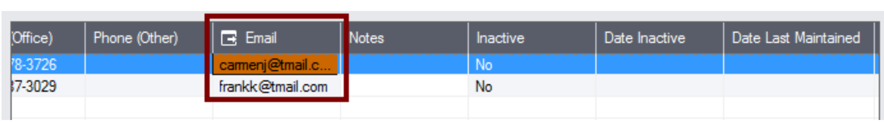
- First and Last Name
- Title (Mr, Ms, Dr, etc.)
- Position (Receiving, etc.)
- 3 Phone Numbers (Office, Mobile, Other)
- Email Address
- Notes (up to 250 characters)
- Inactive and Date Made Inactive
- Date Last Maintained and Last Changed By (Sage 300 User)

To add more customer contacts:

- Select the Contact tab on the Extended Customers form.
- Click in the grid below the contact fields, and press the insert key.



- Add the information for each new contact.
- Click the Email heading to email the contact.



Copy Customers to other Sage 300 companies

IMPORTANT:

You must enter a User ID and Password to copy customers. Make sure the User ID has sufficient rights to complete the operation in the target companies.

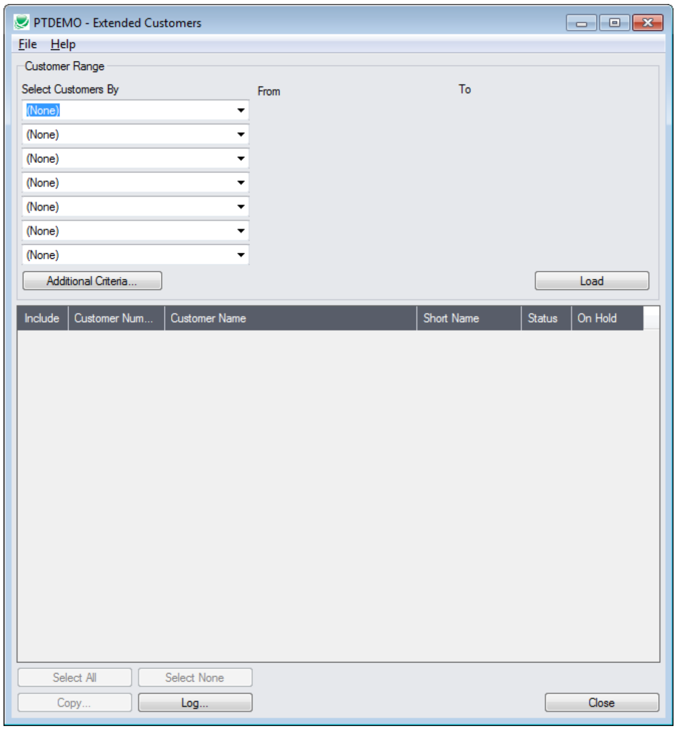
If you are inserting new customers in other companies, check that a current backup exists for the databases being affected.

Note: You cannot copy customers between single-currency and multicurrency companies. Source and target companies must have the same single-currency or multicurrency setting.

- Open the Sage 300 company with the customers that you want to copy.
  - Copy Customers operates from within an existing "source" company, and lets you copy ship-via information to other Sage 300 company databases.

- Open the Extended Customers form, and click the Copy Customers button at the bottom of the screen.

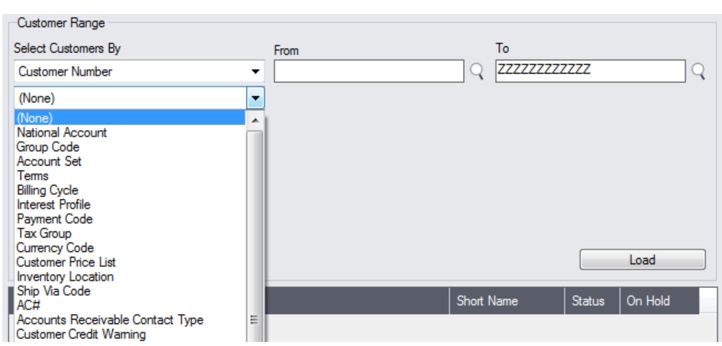
When the Copy Customers button is pressed, a window will pop up for selecting the customers in the source company.



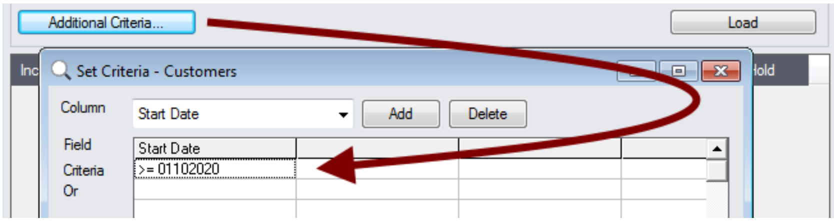
Note: By default, the grid at the bottom of the form will display any new customers that were added in this session. This allows you to bypass the selection process and copy these new customers directly to other Sage company databases.

Specify a range of customers for copying:

You can specify ranges for up to seven customer fields to use for customer selection – including the customer number, national account, group code, account set, terms, billing cycle, interest profile, payment code, tax group, currency code, customer price list, inventory location, ship-via code, or any of the optional fields that you use for customers.

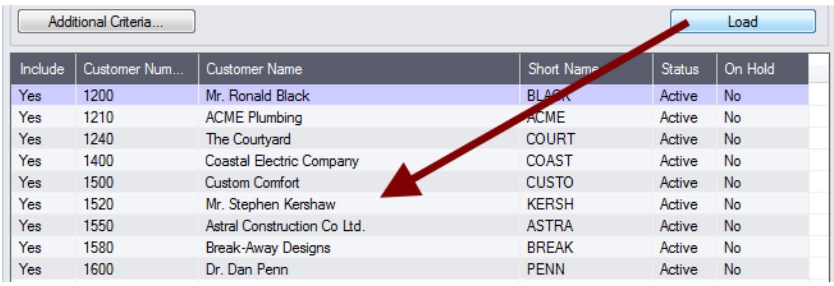


Choose additional criteria:



- Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting customers that were added after a particular date. Click OK to save.

Load the list of customers and choose which ones to copy:



Include	Customer Num...	Customer Name	Short Name	Status	On Hold
Yes	1200	Mr. Ronald Black	BLACK	Active	No
Yes	1210	ACME Plumbing	ACME	Active	No
Yes	1240	The Courtyard	COURT	Active	No
Yes	1400	Coastal Electric Company	COAST	Active	No
Yes	1500	Custom Comfort	CUSTO	Active	No
Yes	1520	Mr. Stephen Kershaw	KERSH	Active	No
Yes	1550	Astral Construction Co Ltd.	ASTRA	Active	No
Yes	1580	Break-Away Designs	BREAK	Active	No
Yes	1600	Dr. Dan Penn	PENN	Active	No

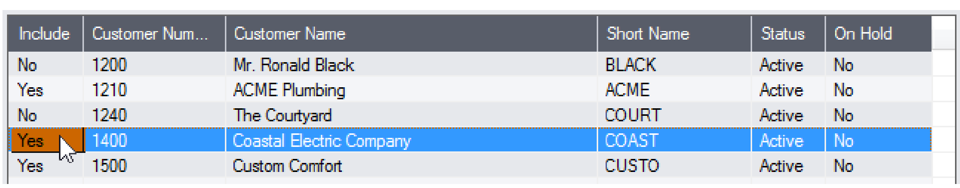
- Click the Load button to display the list of customers.

  When the Load button is pressed, the program will display the customers in the range and with the additional criteria you specified.

  - You can adjust the customer range or additional criteria if necessary, then click Load again.

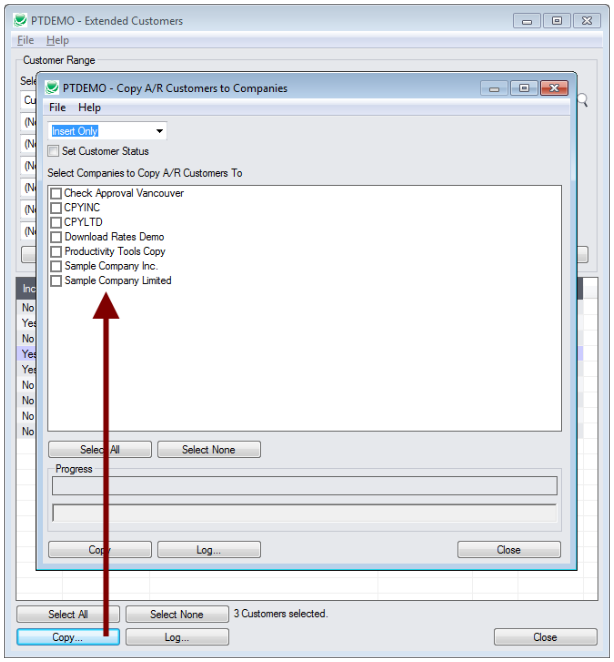
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the customers loaded in the grid.

- Double-click in the Include column to "cherry-pick" customers:



Include	Customer Num...	Customer Name	Short Name	Status	On Hold
No	1200	Mr. Ronald Black	BLACK	Active	No
Yes	1210	ACME Plumbing	ACME	Active	No
No	1240	The Courtyard	COURT	Active	No
Yes	1400	Coastal Electric Company	COAST	Active	No
Yes	1500	Custom Comfort	CUSTO	Active	No

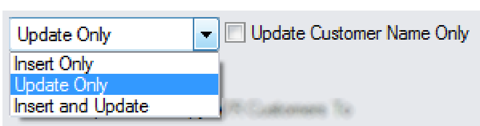
Click the Copy button to display the To Companies screen:



Select whether to insert new codes or update existing ones in target companies:

Before proceeding, you must decide whether to add or update customers in the target companies.

For example, choose Update Only to update addresses and contact information for all existing customers in the target companies.



- Choose whether to insert, insert and update, or just update customers.
  - Insert Only will only add codes if the code does not already exist.
  - Update Only will only update codes that do exist.
  - Insert and Update will perform both of these operations.
- If updating customers only, you can choose to update the customer name only.

Choose whether to set the Customer Status:

Select whether to copy customers' statuses.

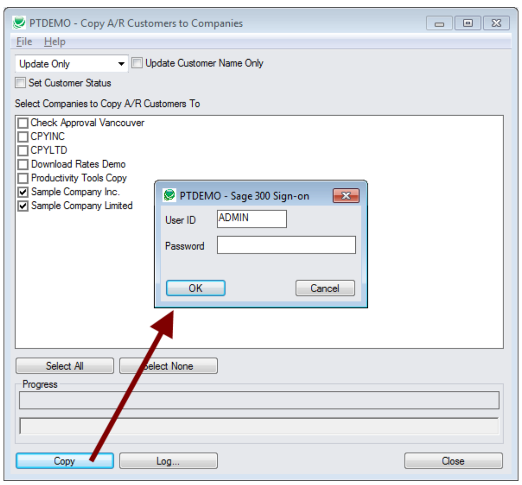
- Inactive customer can always be made active in another company.
- It may not be possible to make an active customer inactive in the target company – in which case, other information will be copied, but the status change failure will be logged and the program will continue to process other customers.

Select target Sage companies:

- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the target companies.

- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy customers:



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

  Note: You MUST have sufficient permissions to update customers in the target companies for copying to proceed.
- The program will copy the customers to the target companies.
- If no changes are required for a selected customer, the record will not be updated – so the audit stamp will be preserved.

Click the Log button to confirm which customers were processed:

```
8/13/2020 1:31:50 PM Copy A/R Customers to Companies started.
8/13/2020 1:31:50 PM
8/13/2020 1:31:50 PM Logged in user: ADMIN
8/13/2020 1:31:50 PM Performed by user: MORGAN
8/13/2020 1:31:50 PM
8/13/2020 1:31:50 PM Update Only
8/13/2020 1:31:50 PM Update Customer Name Only: No
8/13/2020 1:31:50 PM Copy A/R Customers to Companies: Sample Company Inc.
8/13/2020 1:31:50 PM                                  Sample Company Limited
8/13/2020 1:31:50 PM
8/13/2020 1:31:50 PM Copying customers from Productivity Tools Demo to Sample Company Inc.
started.
8/13/2020 1:31:50 PM    Logging in to Sample Company Inc....
8/13/2020 1:31:50 PM        Productivity Tools Demo and Sample Company Inc. must both be
Single Currency, or both be Multicurrency.
```

```
8/13/2020 1:31:50 PM     Logging off of Sample Company Inc....
8/13/2020 1:31:50 PM
8/13/2020 1:31:50 PM Copying customers from Productivity Tools Demo to Sample Company Inc.
complete.
8/13/2020 1:31:50 PM
8/13/2020 1:31:50 PM Copying customers from Productivity Tools Demo to Sample Company Limited
started.
8/13/2020 1:31:50 PM     Logging in to Sample Company Limited...
8/13/2020 1:31:51 PM     Updating customer 1210...
8/13/2020 1:31:51 PM         Customer updated.
8/13/2020 1:31:51 PM     Updating customer 1400...
8/13/2020 1:31:51 PM         Customer updated.
8/13/2020 1:31:51 PM     Updating customer 1500...
8/13/2020 1:31:51 PM         Customer updated.
8/13/2020 1:31:51 PM     Logging off of Sample Company Limited...
8/13/2020 1:31:51 PM
8/13/2020 1:31:51 PM     There was 3 customers updated.
8/13/2020 1:31:51 PM Copying customers from Productivity Tools Demo to Sample Company Limited
complete.
8/13/2020 1:31:51 PM
8/13/2020 1:31:51 PM
8/13/2020 1:31:51 PM Copy A/R Customers to Companies complete.
8/13/2020 1:31:51 PM
================================================================================
```

The Log lists:

- The user and the type of operation performed.
- Each customer that was processed and whether the records were updated.