

# 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 if you use older versions of Sage 300. If you use Sage 300 2020.1 or higher and activate the Sage M/T Contacts module, Accounts Receivable uses Sage 300's Multiple Contacts features.
- 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.

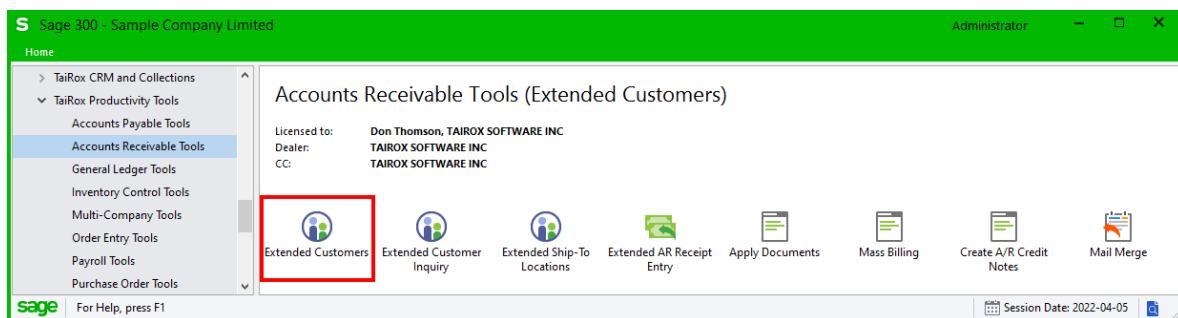
If you use an older version of Sage 300 – prior to Sage 300 2020.1 – you can add multiple contacts per vendor using Extended Customers. If you have installed Sage 300 2020.1 and have activated Sage Multiple Contacts module, Accounts Receivable uses Sage 300's Multiple Contacts features.

See [Convert TPT Contacts to Sage 300 Multiple Contacts](#) for instructions on converting TaiRox contacts to Sage 300 Multiple Contacts.

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

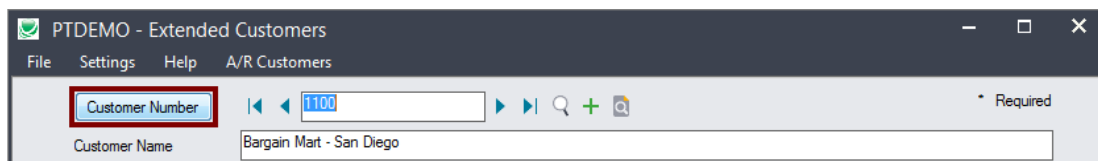
## Using Extended Customers

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.



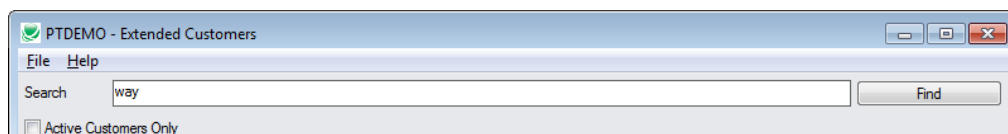
## SmartFinder – Customers

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:**

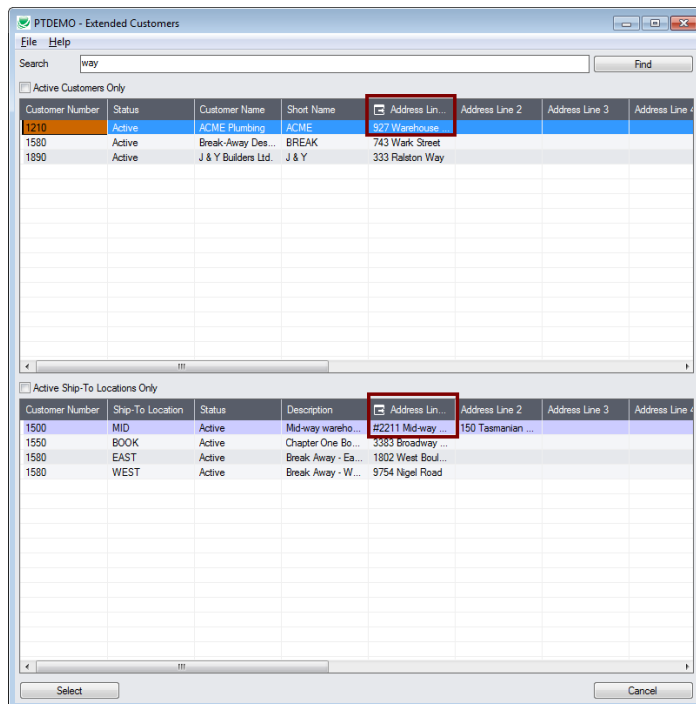
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for “Ross Blvd”, you will not see a customer where “Ross” is in the Customer Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the customer address) are treated as a single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



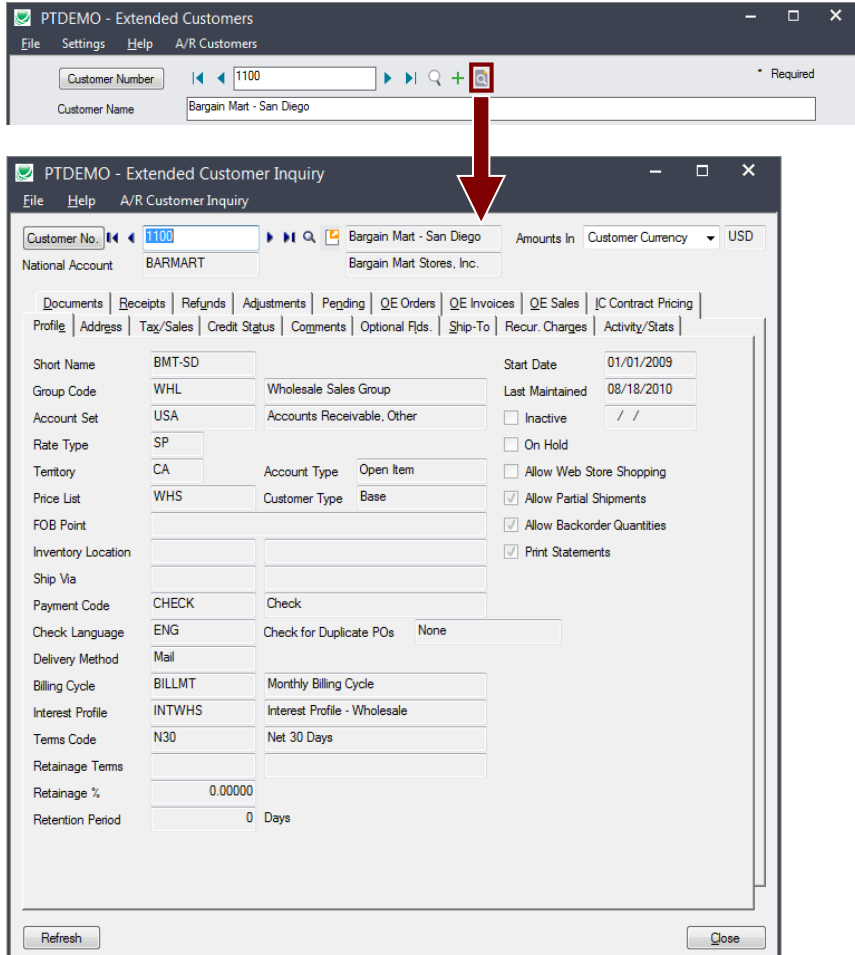
**Selection:**

- 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

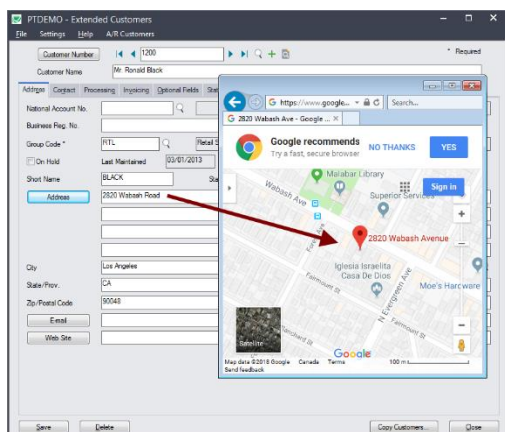
Customer Inquiry button displays the TaiRox Productivity Tools Customer Inquiry screen – a convenient way to view data related to the customer. Each tab focuses on an aspect of the customer’s data.

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



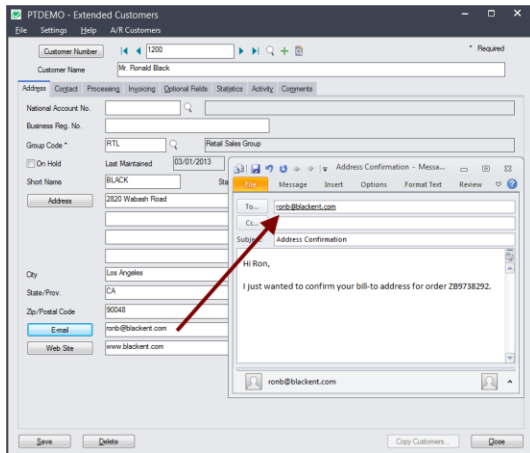
## Look up addresses in Google maps

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



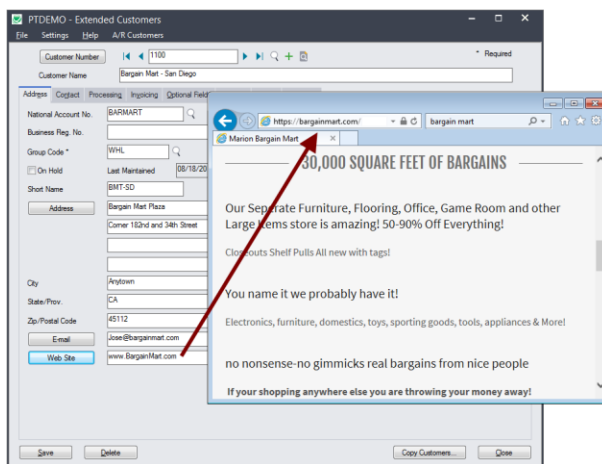
### Launch emails for customers and customer contact email addresses

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



### Look up Web sites in your browser

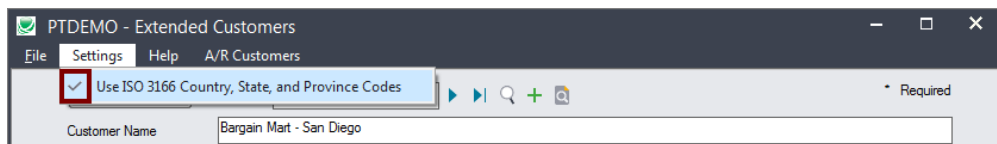
- Click the Web Site button on the Extended Customers screen to confirm Web site URLs.



### 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.

|             |         |           |                |
|-------------|---------|-----------|----------------|
| City        | Anytown | Country   | US             |
| State/Prov. | CA      | Telephone | (408) 451-8981 |

- 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. If you use Sage 300 2020.1 or higher, Accounts Receivable uses Sage 300's Multiple Contacts features.

Prior to version 2020.1, Sage 300 Accounts Receivable only stored 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 contrast, Extended Customers lets you store as many as you require for older versions of Sage 300, by adding a list of contacts to the Contact tab of the Extended Customers screen.

### To add customer contacts in Sage 300 2020.1 (PU1) and later:

- Select the Contact tab on the Extended Customers form.

#### To add a new contact:

- Click in the Create New Contact button below the grid, and fill in the information on the form that appears.

#### To add an existing contact for this vendor:

- Click in the grid and press the insert key – as shown below.

| Q Contact Code  | Email              | A/R Invoices | A/R Receipts | A/R Statements |
|-----------------|--------------------|--------------|--------------|----------------|
| FRENCHBETH1...  | bethfrench@abf.com | X            |              | X              |
| SLOANJOE1200    | joesloan@abf.com   |              | X            |                |
| VIPONDFRANCI... | francisv@abf.com   | X            |              |                |
| SEC             |                    |              |              |                |

- Type the first few characters of the contact code, then click the Finder button.
- Select the contact from the Finder to add the contact.
- Select Recipients for standard accounting documents by double-clicking in the appropriate column (as shown above).

### To delete an existing contact from this vendor:

- Select the contact in the grid and press the Delete key.

Note that this will not delete the contact from Sage 300. To delete the contact from Sage, use the M/T Contacts program in Common Services.

**To view all contact information:**

- Select the contact and click the View Contact Details button below the grid.

**To add customer contacts in Extended Customers for older versions of Sage 300:**

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

| Last Name | First Name | Title | Position      | Phone (Mobile) | Phone (Office) | Phone (Other) |
|-----------|------------|-------|---------------|----------------|----------------|---------------|
| Jenner    | Carmen     | Ms    | Sales Manager | (778) 926-8175 | (673) 978-3726 |               |
| Keller    | Frank      | Mr    | Salesperson   | (778) 432-8292 | (673) 987-3029 |               |

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

| Office | Phone (Other) | Email            | Notes | Inactive | Date Inactive | Date Last Maintained |
|--------|---------------|------------------|-------|----------|---------------|----------------------|
| 8-3726 |               | camerj@mail.c... |       | No       |               |                      |
| 7-3029 |               | frankk@mail.com  |       | No       |               |                      |

**Copy Customers to other Sage 300 companies**

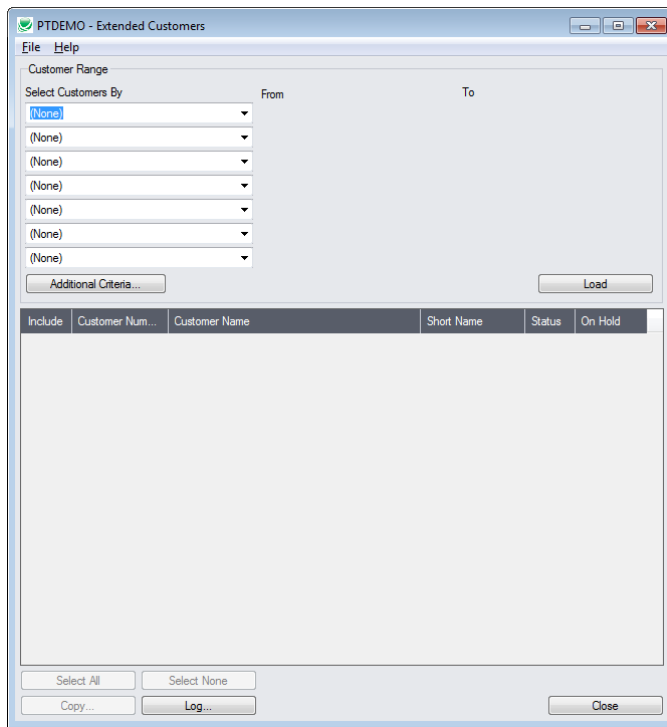
**IMPORTANT:**

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.

- 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.

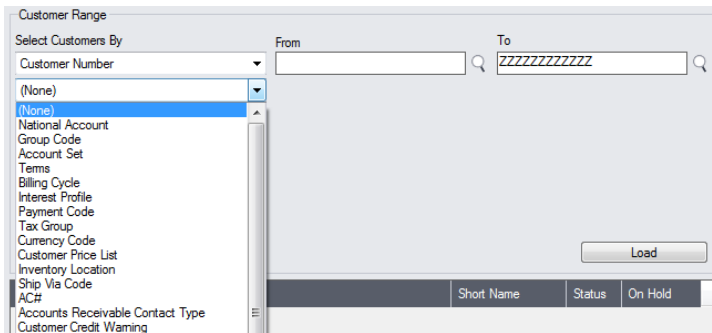
When the Copy Customers button is pressed, a window will pop up for selecting the customers in the source company.



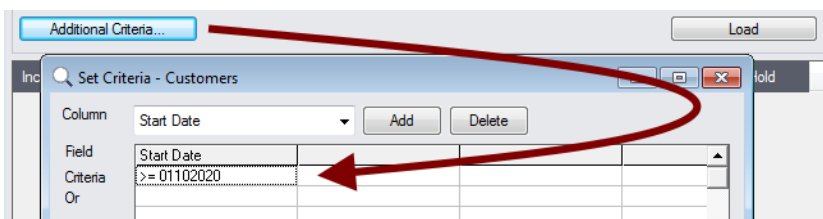
**Note:** By default, the grid at the bottom of the form will display any new customers that were added in this session. This allows you to bypass the selection process and copy these new customers directly to other Sage company databases.

***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      |

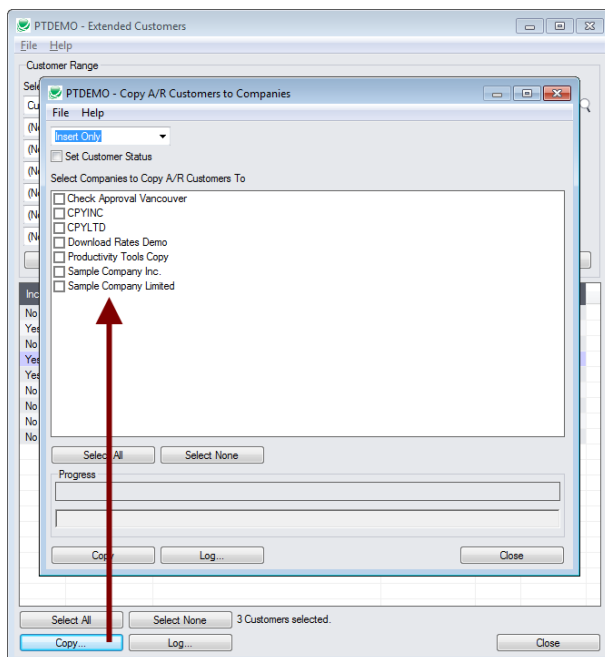
- Click the Load button to display the list of customers.  
When the Load button is pressed, the program will display the customers in the range and with the additional criteria you specified.
  - You can adjust the customer range or additional criteria if necessary, then click Load again.
- Click the 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      |

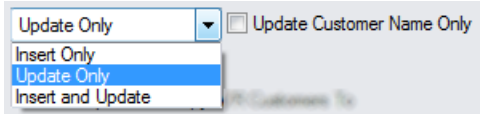
**Click the Copy button to display the To Companies screen:**



**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.

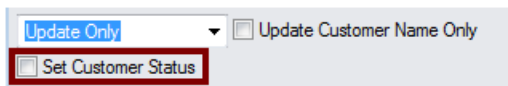
For example, choose Update Only to update addresses and contact information for all existing customers in the target companies.



- 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.

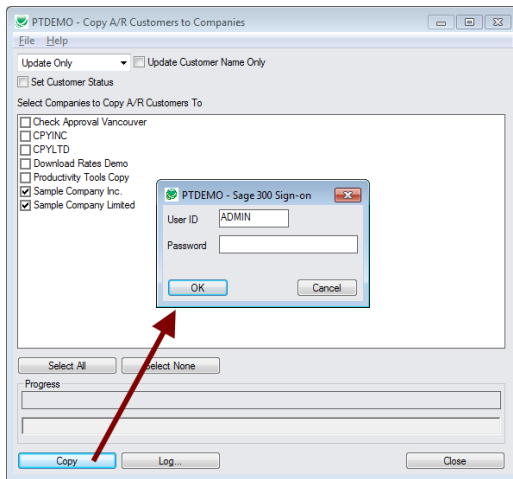
**Select target Sage companies:**

- 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      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 Copy A/R Customers to Companies complete.
=====
    
```

The Log lists:

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

## Convert TPT Contacts to Sage 300 Multiple Contacts

If you upgraded to Sage 300 2020.1 (2020 with PU1 installed), you can take advantage of Sage 300's new Multiple Contacts.

The Sage 300 Multiple Contacts (M/T) program lets you to create contacts and assign them to A/R customers (including national accounts) and A/P vendors.

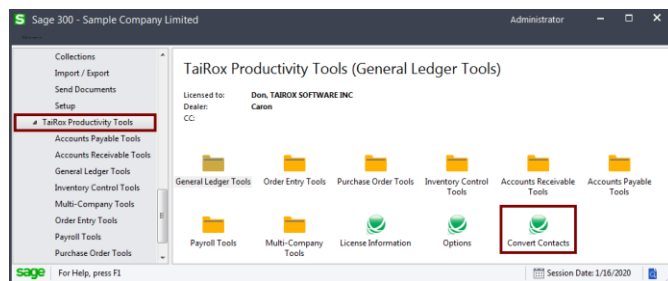
You can assign an unlimited number of contacts to a single customer or vendor, and you can assign a contact to multiple customers and vendors.

You can open the M/T Contacts screen to add new contacts from Common Services, or – more useful – open it from the TaiRox's Extended Customers and Extended Vendors screens.

### Follow these steps to convert TaiRox Productivity Tools contacts to Sage 300 contacts

**Step 1:** Activate Sage 300 Multiple Contacts using the Data Activation program in Administrative Services.

**Step 2:** Run Convert Contacts in the TaiRox Productivity Tools folder on the Sage Desktop.



**Step 3:** Fill in the Convert Contacts screen and convert your existing contacts to Sage 300 MT contacts.

The conversion process assigns new contact codes to each of your existing TaiRox Productivity Tools contacts. You cannot convert contacts until you specify how the new codes will be constructed.

#### Note the following points:

- You must specify the fields from your existing contact records (segments) that will be used to create the new contact codes. Each code must be unique.

For example, the following settings will generate contact codes using the Last Name followed by the First Name of your existing customers -- with no extra spaces between last and first name.

A Sage 300 Contact Code has a Maximum Length of 24 Characters

Trim Blanks From Segments Before Combining

Build the Contact Code From These Segments

Last Name

First Name

(None)

- All of your existing contacts will be assigned to the customers/vendors to which they are currently assigned.
- You can use the following data to create contact codes:
  - First Name
  - Last Name
  - Customer Number/Vendor Number

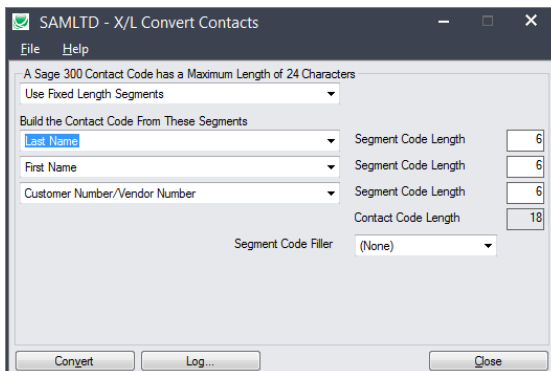
You may require the customer or vendor number as part of the contact code if you previously used generic names for customer and vendor company contacts – such as “Sales,” “Purchasing,” “Payables,” or “Receivables.”
- The maximum length of a Sage 300 contact code is 24 characters.  
This means that data will be truncated to fit into 24 characters.
  - If you choose Last Name / First Name, and a contact has a long name like “Constantine Heathcote-Drummond,” the first name will be truncated.

### Using Fixed Length Segments

Conversion also lets you use a fixed number of letters from the first and last names – another typical way to assign codes for records.

- Choose “Use Fixed Length Segments” from the top dropdown.
- Specify the number of characters for each segment.
- Specify the character for filling out the segment length – or specify None to remove extra spaces.

For example, the following screen uses 6 characters from the Last Name, First Name and Customer/Vendor Number, and it uses no filler characters.



A current contact name of “Fred Lee,” customer 1200, would have a new contact code “LeeFred1200.”

### After conversion is complete, you can:

- Select which contacts are recipients of accounting documents such as A/P Letters, P/O Purchase Orders, and P/O Returns.
- Link existing contacts to additional companies.
- Edit converted contacts in Common Services or by opening the contact record from the Extended Customers and Extended Vendors screens.