

# TaiRox Productivity Tools - Extended Customers User Guide

## Shortcuts to Feature Descriptions in this Document:

[SmartFinder](#) Find a customer quickly from a phone number or address.

[Enforcing Country Codes](#) At data entry time, turn this option on 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.

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## SmartFinder

How do you find a customer when you only know part of an address or a phone number? SmartFinder will search multiple columns in both customer and ship-to tables and display all matches - just like a modern search engine. Click on the Customer Number button as shown:

The screenshot shows the PTDEMO - Extended Customers application window. The title bar includes the application name and standard window controls. The menu bar contains 'File', 'Help', and 'A/R Customers'. The main interface features a search bar with a 'Customer Number' button highlighted in red. Below the search bar is a 'Customer Name' field. A tabbed interface includes 'Address', 'Contact', 'Processing', 'Invoicing', 'Optional Fields', 'Statistics', 'Activity', and 'Comments'. The 'Address' tab is active, showing fields for National Account No., Business Reg. No., Group Code \*, On Hold, Last Maintained, Inactive, Short Name, Start Date (06/04/2020), and Territory. Below these are buttons for 'Address', 'E-mail', and 'Web Site'. At the bottom, there are 'Add', 'Delete', 'Copy Customers...', and 'Close' buttons.

**Google Maps** will be launched when the Address button is clicked. **Your email client** will be launched when the Email button is clicked. The **Customer Web Site** will be visited when the Web Site button is clicked.

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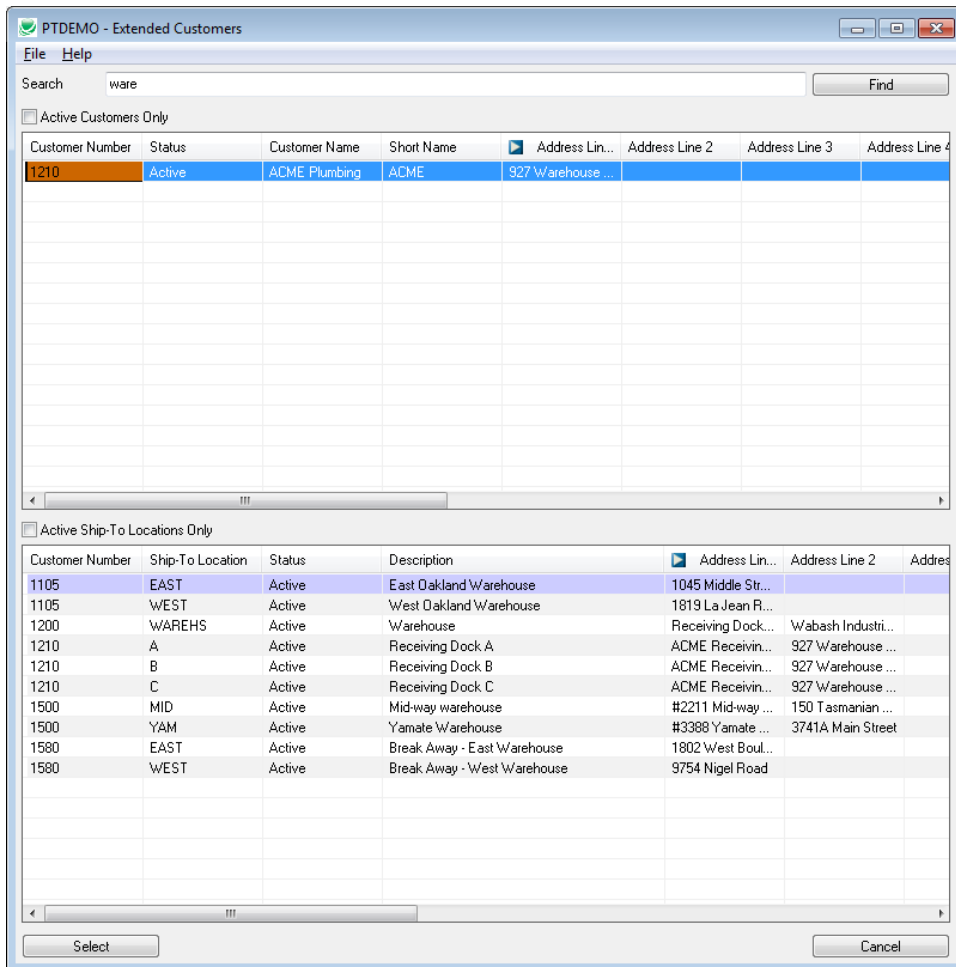
## SmartFinder

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".



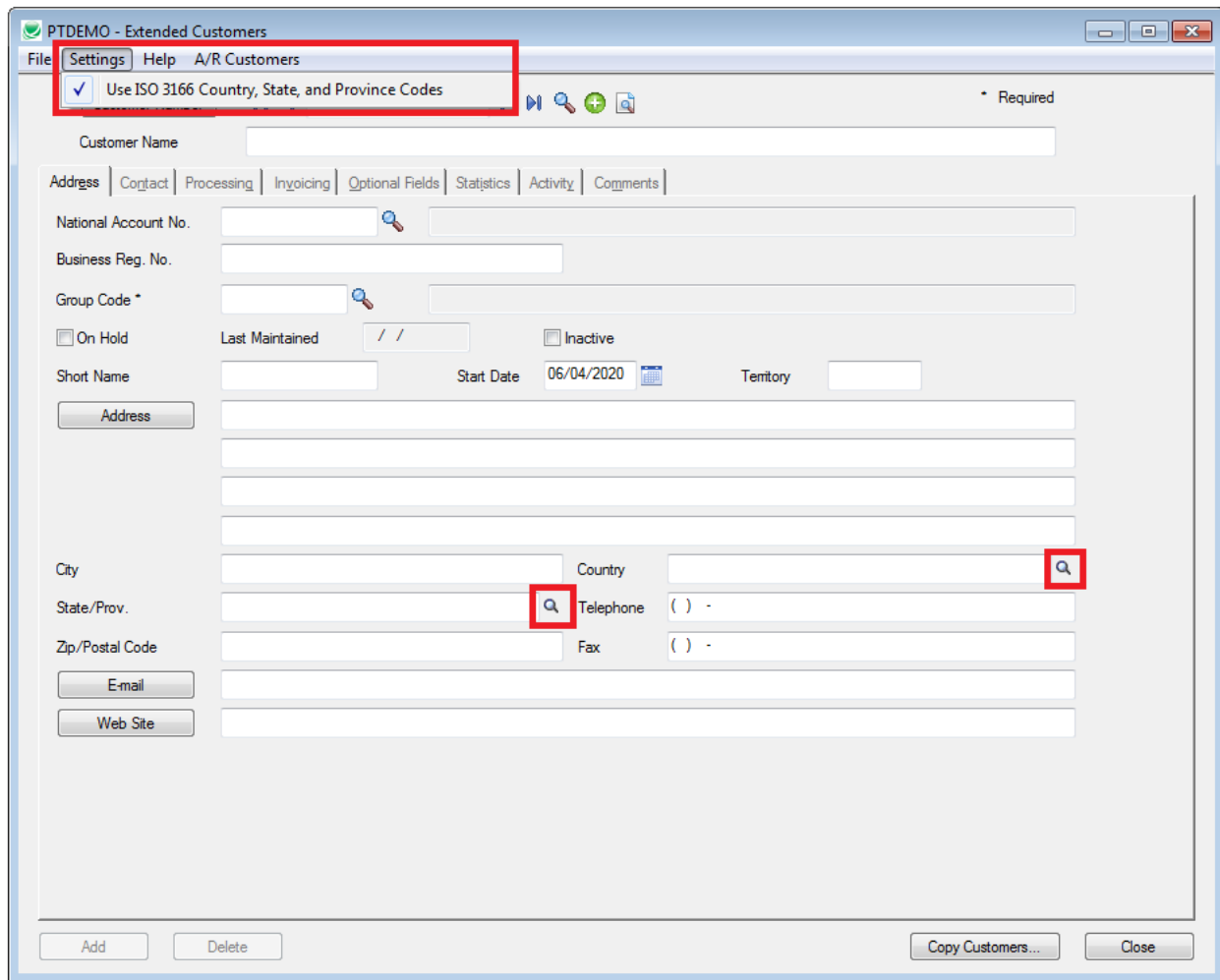
**Google Maps** is launched with the selected address when you click on the right-arrow icon:



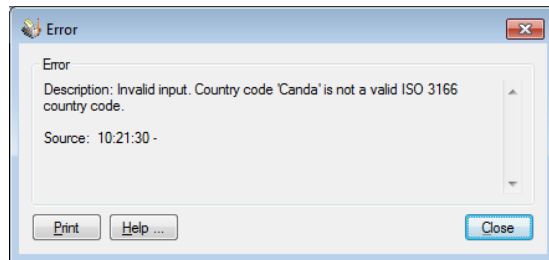
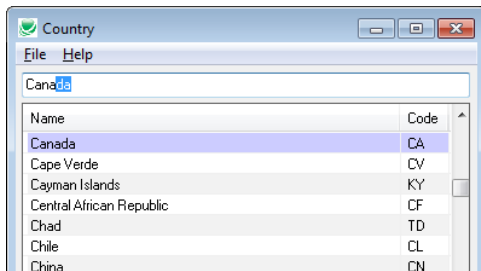
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## Enforcing Country Codes

There may be a requirement that address data stored in Sage 300 have valid Country, State and Province codes. For example, the Sage 300 data may feed into shipping software. A setting, which can only be change by the Sage 300 ADMIN, controls the enforcement of codes. When enforcement is turned on, finders will appear next to Country and State/Prov fields and when data is to be saved, a message will appear if the codes are not valid and the codes must be fixed.



The finder and a sample error message are shown here:





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## Copy Customers

When launched, Extended Customers displays the core Sage 300 entry window with an additional button, "Copy Customers". All normal functions can be performed.

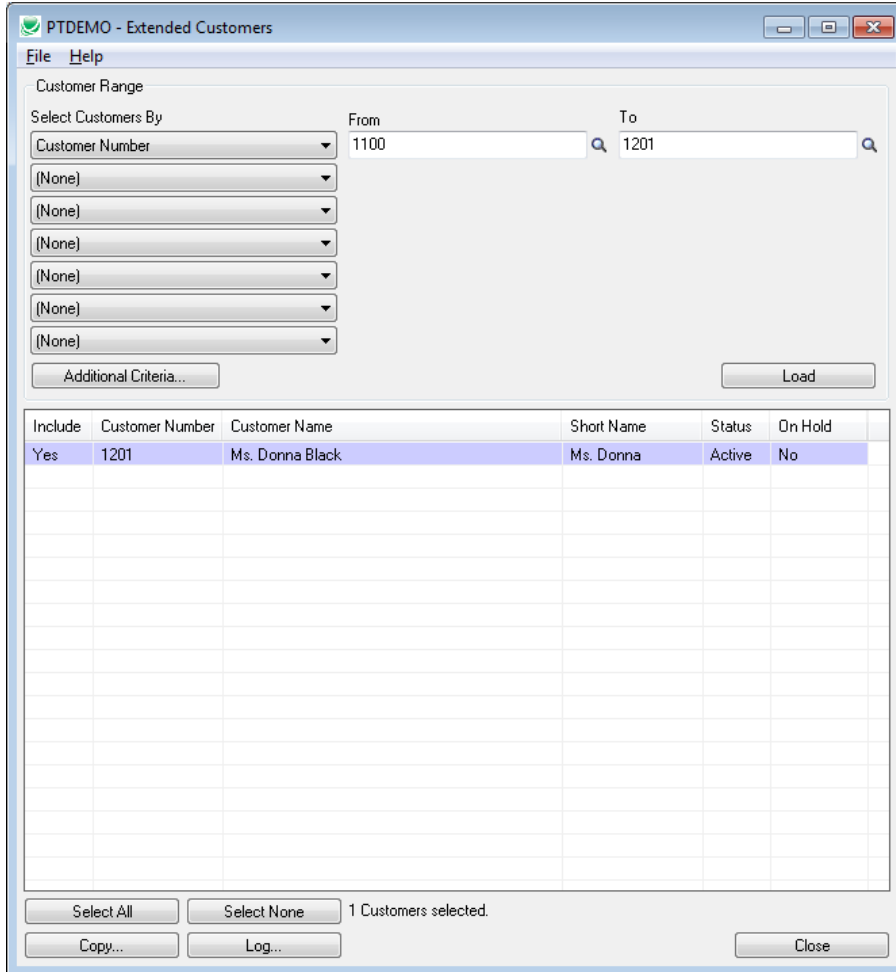
Suppose, as illustrated here, that a new customer has just been added using normal functionality.

The screenshot shows a software window titled "PTDEMO - Extended Customers". The window has a menu bar with "File", "Settings", "Help", and "A/R Customers". Below the menu bar is a toolbar with various icons. The main area contains a form for customer data. At the top, there is a "Customer Number" field with the value "1201" and a "Required" indicator. Below that is the "Customer Name" field with the value "Ms. Donna Black". The form is divided into several sections: "Address", "Contact", "Processing", "Invoicing", "Optional Fields", "Statistics", "Activity", and "Comments". The "Address" section includes fields for "National Account No.", "Business Reg. No.", "Group Code \*" (with value "RTL" and "Retail Sales Group"), "On Hold" checkbox, "Last Maintained" (12/05/2016), "Inactive" checkbox, "Short Name" (Ms. Donna), "Start Date" (06/05/2020), and "Territory". The "Address" field contains "2820 Wabash Road". The "City" field contains "Los Angeles", "Country" contains "US", "State/Prov." contains "CA", "Telephone" contains "(213) 555-0274", "Zip/Postal Code" contains "90048", and "Fax" contains "(213) 555-234". The "E-mail" field contains "donna52black@gmail.com" and the "Web Site" field is empty. At the bottom of the window, there are buttons for "Save", "Delete", "Copy Customers...", and "Close".

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## Copy Customers

When the Copy Customers button is pressed, the following pop-up window is displayed. Note that customers that have just been added or modified will be displayed in the grid - in our illustration, the new customer is displayed. This can be cleared by clicking on File / Clear List of Customers Changed This Session.

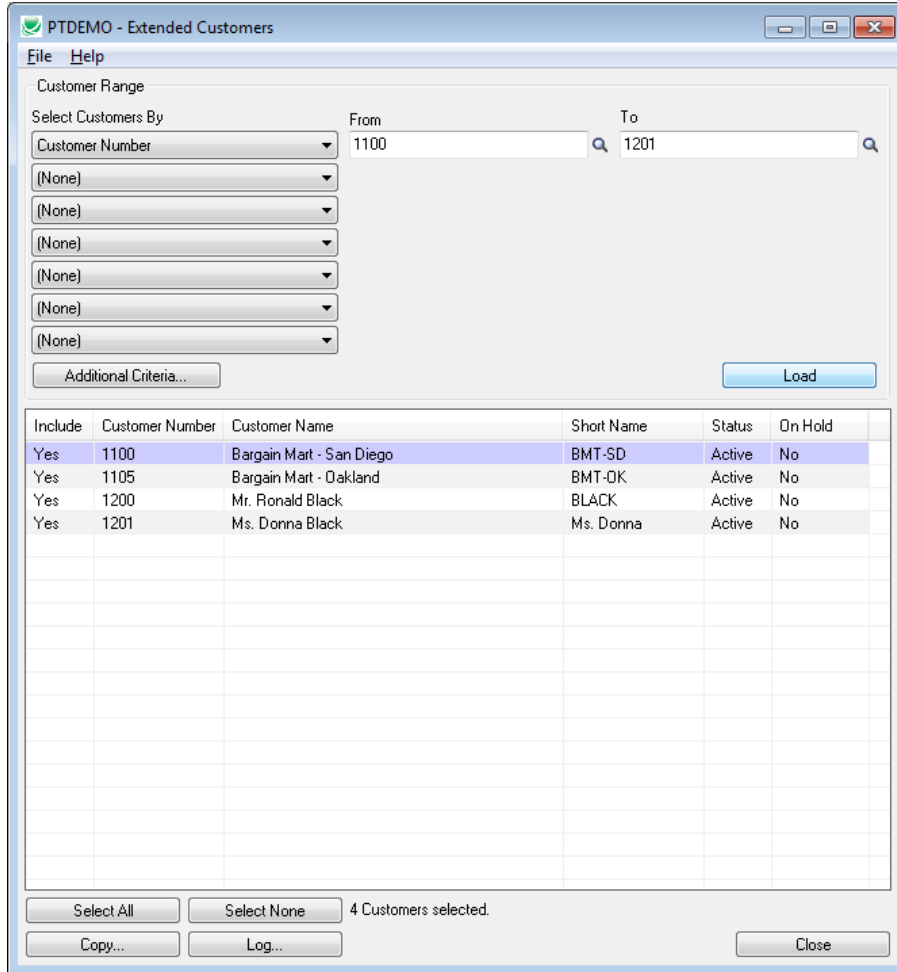


Rather than copying the newly entered customers, any set of customers can be added using up to 7 filters. The filters most recently used are remembered as user settings - here a range of customers. Pressing the Load button will perform the filtering of customers.

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## Copy Customers

When the Load button is pressed, the screen refreshes with the filtered data. The customers can then be selected or de-selected on an individual basis by double-clicking on the first column.



Include	Customer Number	Customer Name	Short Name	Status	On Hold
Yes	1100	Bargain Mart - San Diego	BMT-SD	Active	No
Yes	1105	Bargain Mart - Oakland	BMT-OK	Active	No
Yes	1200	Mr. Ronald Black	BLACK	Active	No
Yes	1201	Ms. Donna Black	Ms. Donna	Active	No

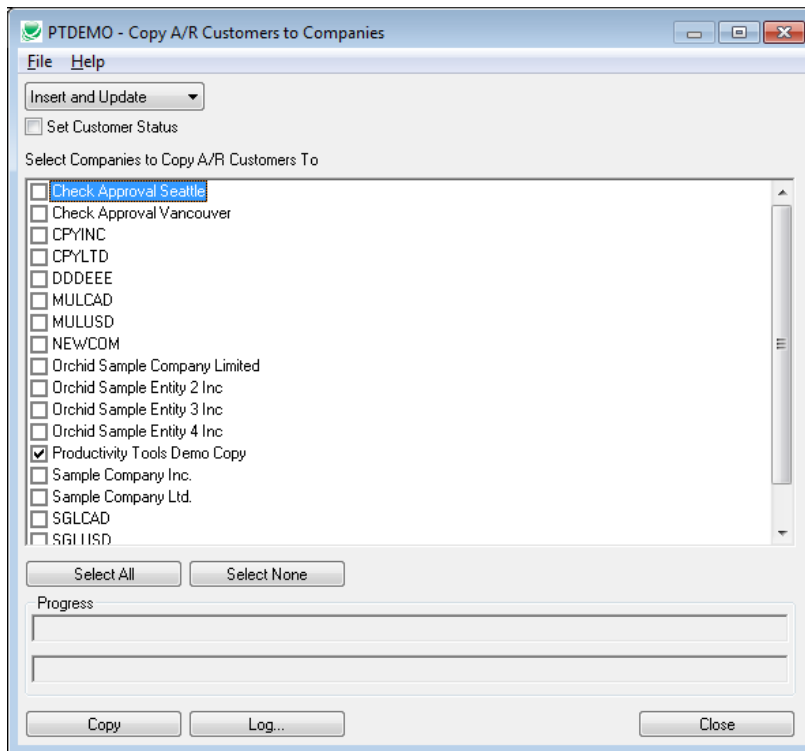
Pressing the Copy button will continue to the next step - selecting companies.



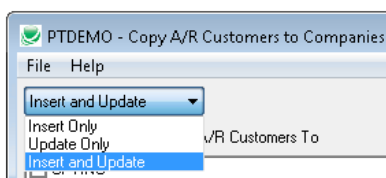
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## Copy Customers

When the Copy button is pressed, the following pop-up window is displayed. The companies can then be selected or de-selected on an individual basis. A checkbox controls whether or not a customer's status will be copied. An inactive customer can always be made active in another company. If an active customer is to be made inactive, this may not be possible in other companies - in which case other information will be copied, the status change failure will be logged and processing of other customers will continue.



**Important Note:** Before proceeding, decide which operation is to be performed. This is controlled by the drop-down at the top of the window:



Operation to be Performed:

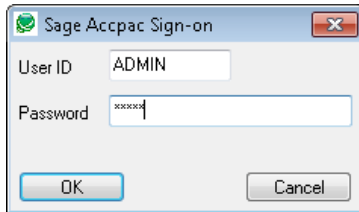
- Insert Only operation will only add customers, if the customer does not already exist.
- Update Only operation will only update customers that do exist.
- Insert and Update will perform both of these operations.

Pressing the OK button will continue to the next step - entering credentials.

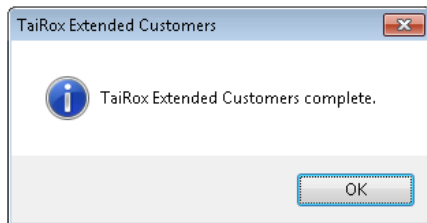
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## Copy Customers

After pressing OK, you will be asked for a User Id and Password. Make sure the user has sufficient rights to complete the operation. Before continuing, you should check that a current backup exists for the databases being affected or that the operation being requested is limited in nature.



Progress will be displayed as the operation proceeds. Progress will be displayed and eventually the completion of the operation will be signaled by this window:



The operation can be cancelled - if it is cancelled the operations contemplated will be partially complete and an assessment of the situation may be required before further work is done.

Sage 300 business objects are used to perform the copying. Illegal copy operations are therefore blocked and errors placed in the log file. For example, it is illegal to update a multi-currency customer from a single-currency customer. When no changes are required for a selected customer, there is no update performed - so the audit stamp is preserved.

A log of operations performed (or not performed) is available from the Log button.

