

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.

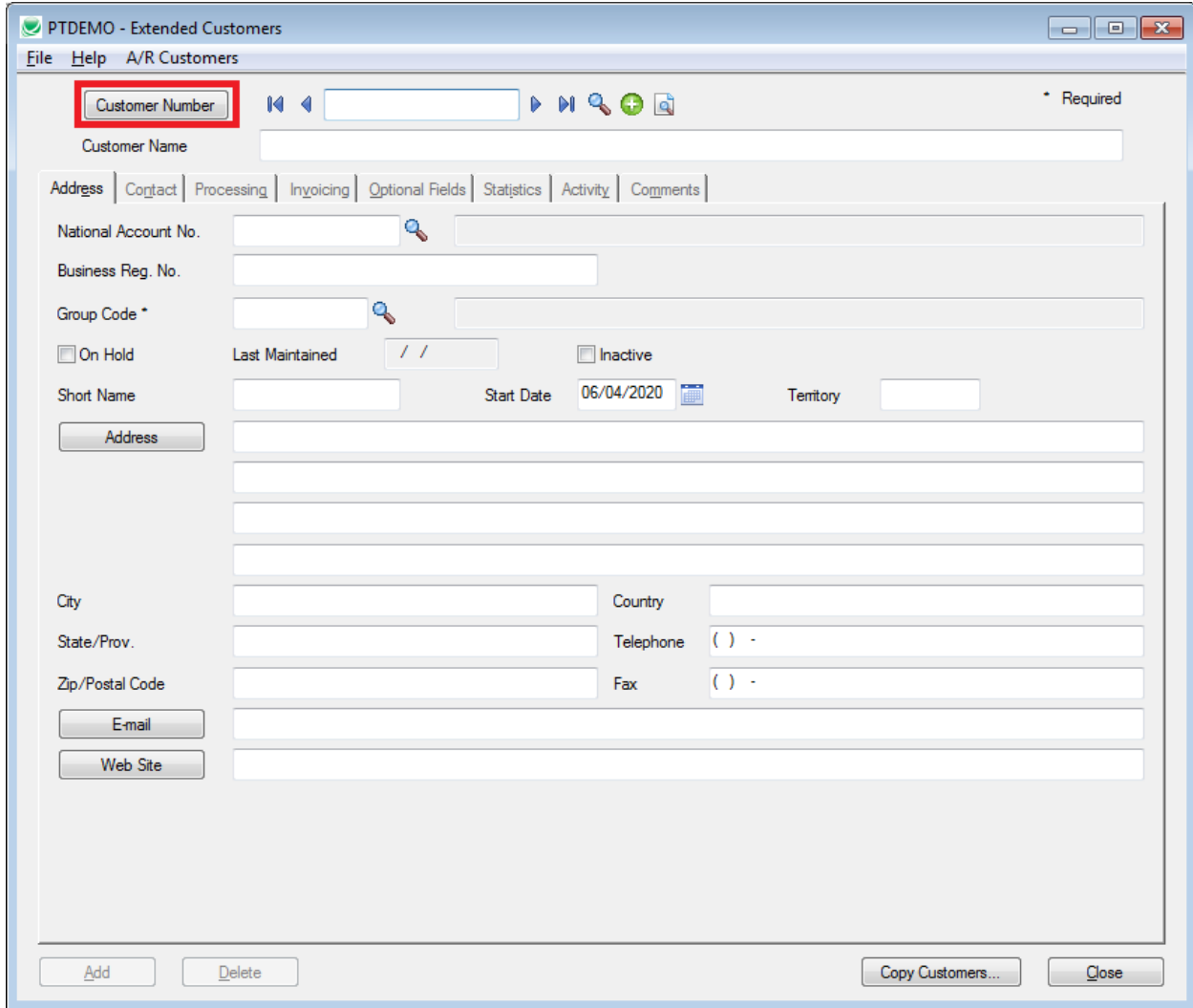
[Multiple Contacts](#) Store an unlimited number of contacts per customer with over 10 fields of information for each contact.

[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:



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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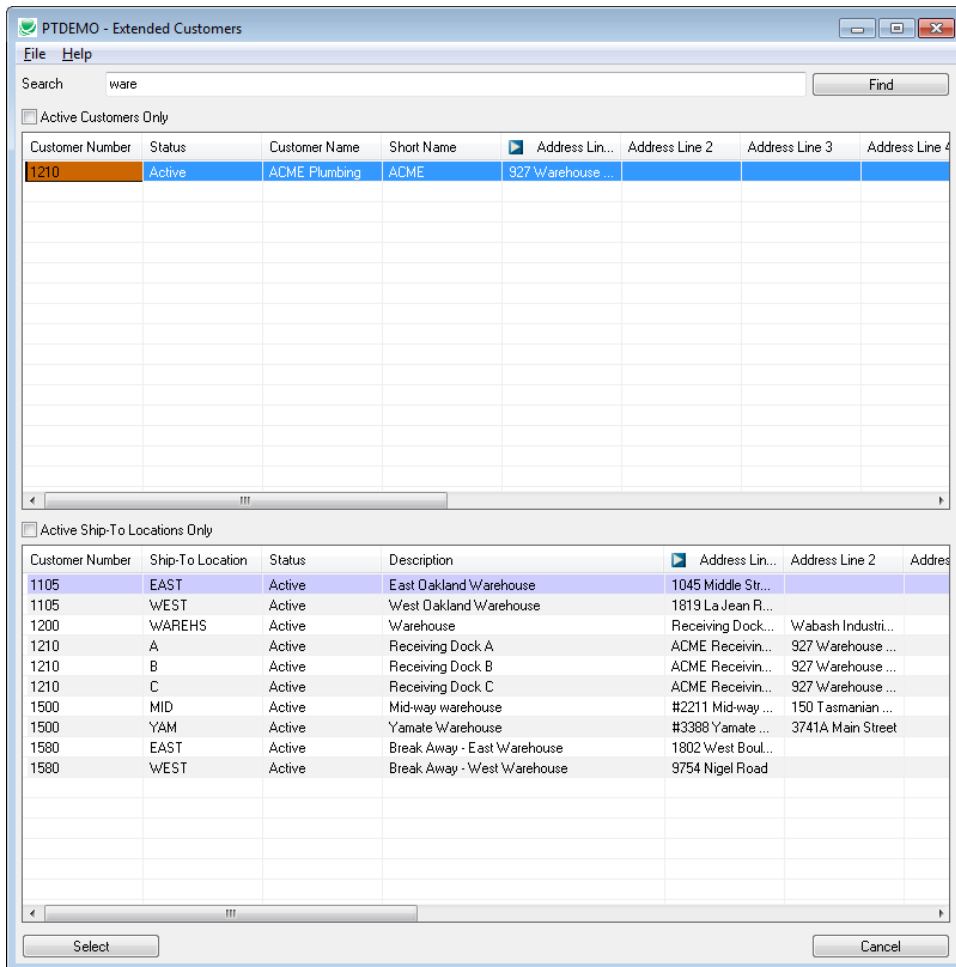
SmartFinder

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.

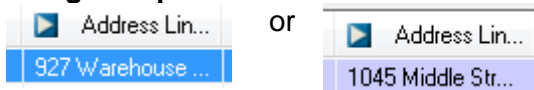
Select a row in the customer grid or ship-to grid and that customer will be selected and you will be returned to the main entry form.

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".



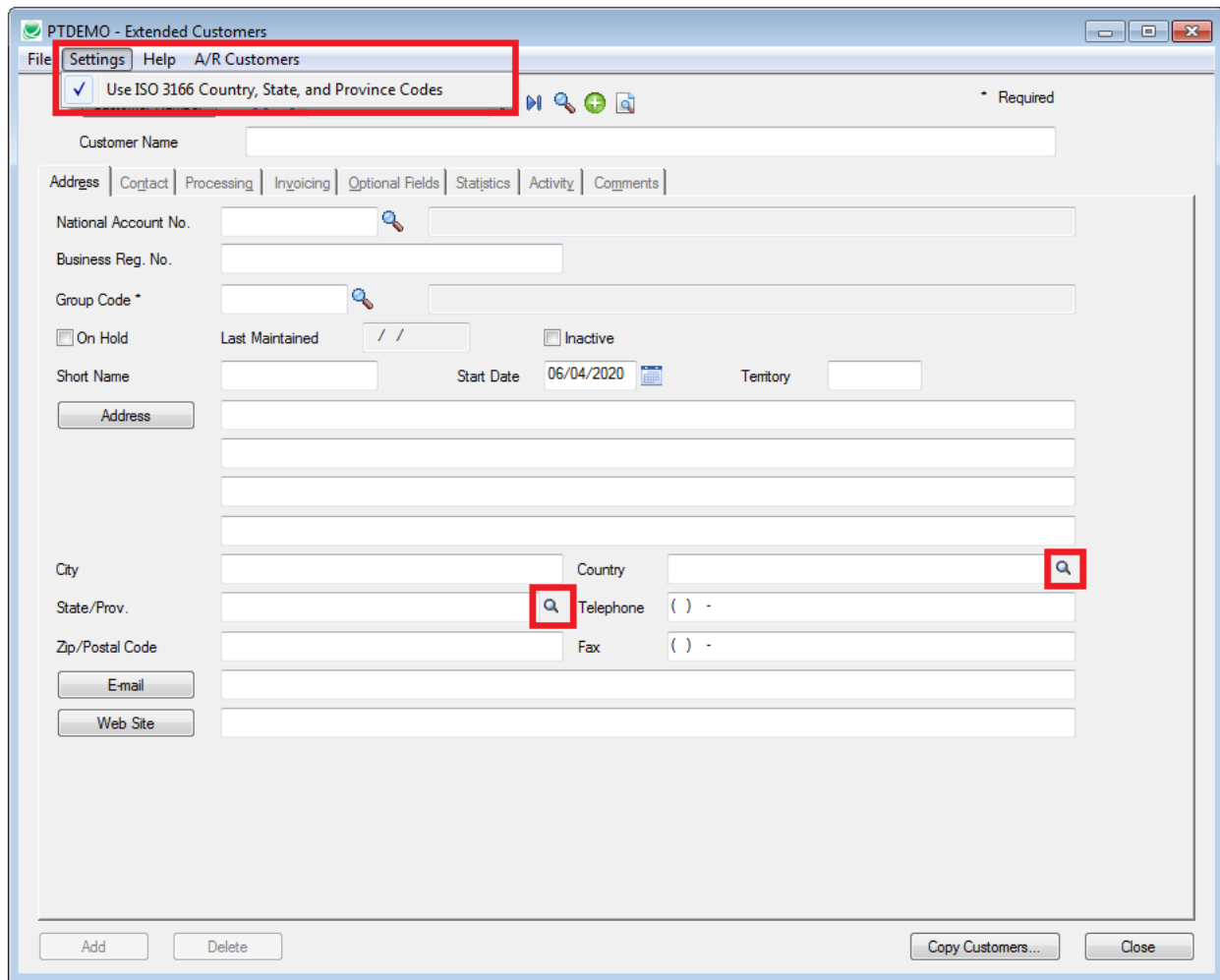
Google Maps is launched with the selected address when you click on the right-arrow icon:



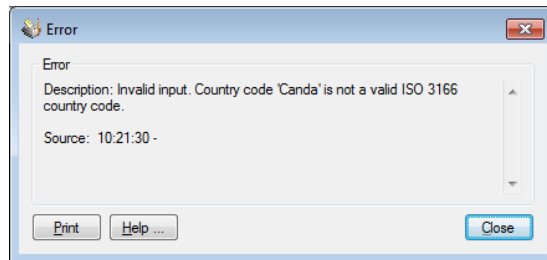
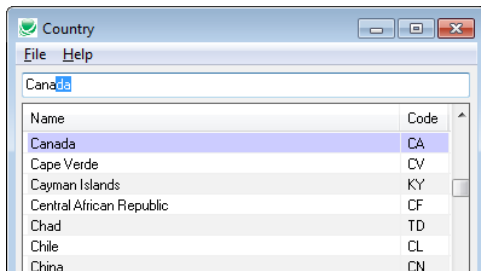
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Enforcing Country Codes

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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Multiple Contacts

Sage 300 only stores a single contact for each customer. TaiRox Extended Customers allows you to store as many as you require, by adding a list of contacts to the Contact tab of the UI.

Additionally, Sage 300 only stores the contact's name, phone number, fax number, and e-mail address for the one contact. Extended Customers stores the following information for each contact:

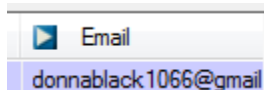
- First and Last Name
- Title (Mr, Ms, Dr, etc)
- Position (VP Sales, etc)
- 3 Phone Numbers (Office, Mobile, Other)
- Email Address
- Notes (up to 250 characters)
- Inactive and Date Made Inactive
- Date Last Maintained and Last Changed By (Sage 300 User)

A Sage 300 grid is displayed below the normal contact information. Any number of rows can be entered into the grid and saved for future reference.

The screenshot shows the PTDEMO - Extended Customers application window. The window title is "PTDEMO - Extended Customers" and the menu bar includes "File", "Settings", and "Help". The main area contains a form for customer information. The "Customer Number" field is set to "1200". The "Customer Name" field is set to "Mr. Ronald Black". The "Contact" field is set to "Mr. Black". The "Telephone" field is empty. The "Fax" field is empty. The "Email" field is set to "ronaldblack99@hotmail.com". Below the form is a grid of contacts. The grid has the following columns: Last Name, First Name, Title, Position, Phone (Mobile), Phone (Office), Phone (Oth...), Email, Notes, Inactive, Date Inactive, Date Last M..., and Last Changed By. The grid contains two rows of data:

Last Name	First Name	Title	Position	Phone (Mobile)	Phone (Office)	Phone (Oth...	Email	Notes	Inactive	Date Inactive	Date Last M...	Last Changed By
Black	Donna	Ms	VP Sales	(604) 629-0223	(604) 805-1871		donnablack106...	Don't phone bef...	No		3/1/2013	ADMIN
White	Barry	Mr	VP Develop...	(604) 629-1871			does not use	@RealBarryWhite	No		3/1/2013	ADMIN

Your email client is launched with the selected address when you click on the right-arrow icon:



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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.

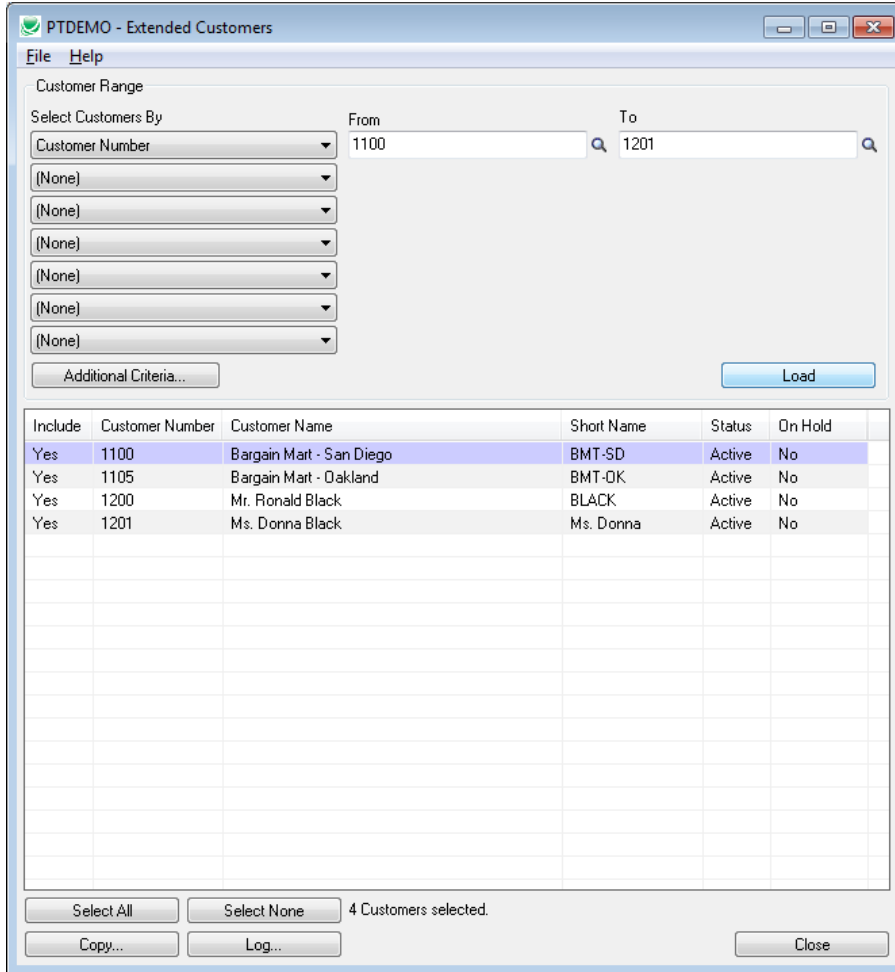
Suppose, as illustrated here, that a new customer has just been added using normal functionality.

The screenshot shows the PTDEMO - Extended Customers application window. The title bar reads "PTDEMO - Extended Customers" and the menu bar includes "File", "Settings", "Help", and "A/R Customers". The main interface features a toolbar with navigation icons and a "Customer Number" field containing "1201". Below this is the "Customer Name" field with "Ms. Donna Black". A tabbed interface is visible with tabs for "Address", "Contact", "Processing", "Invoicing", "Optional Fields", "Statistics", "Activity", and "Comments". The "Address" tab is active, displaying various fields: "National Account No.", "Business Reg. No.", "Group Code" (RTL), "Retail Sales Group", "On Hold" checkbox, "Last Maintained" (12/05/2016), "Inactive" checkbox, "Short Name" (Ms. Donna), "Start Date" (06/05/2020), "Territory", "Address" (2820 Wabash Road), "City" (Los Angeles), "Country" (US), "State/Prov." (CA), "Telephone" ((213) 555-0274), "Zip/Postal Code" (90048), "Fax" ((213) 555-234), "E-mail" (donna52black@gmail.com), and "Web Site". At the bottom of the window, there are buttons for "Save", "Delete", "Copy Customers...", and "Close".

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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.



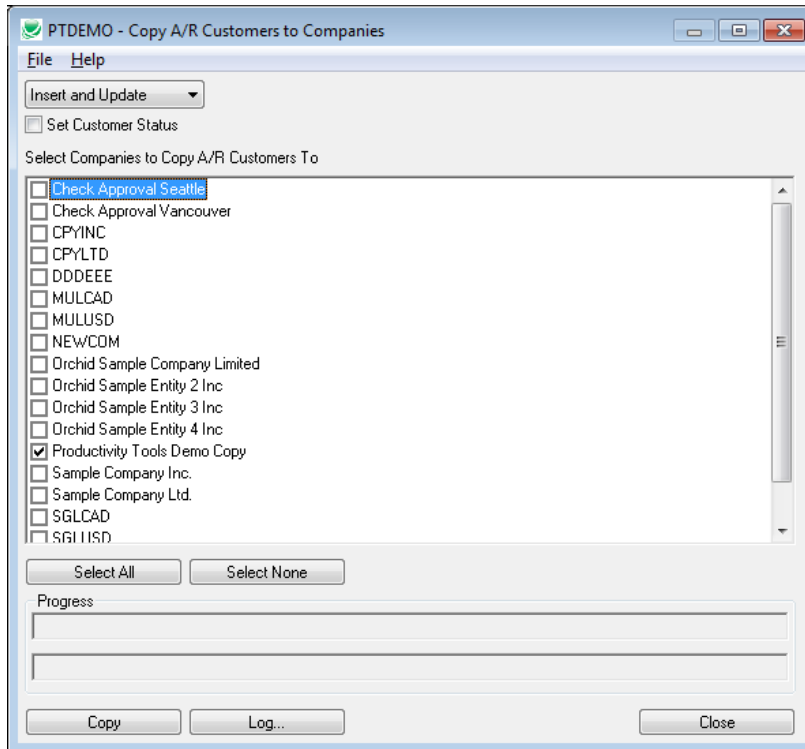
Include	Customer Number	Customer Name	Short Name	Status	On Hold
Yes	1100	Bargain Mart - San Diego	BMT-SD	Active	No
Yes	1105	Bargain Mart - Oakland	BMT-OK	Active	No
Yes	1200	Mr. Ronald Black	BLACK	Active	No
Yes	1201	Ms. Donna Black	Ms. Donna	Active	No

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

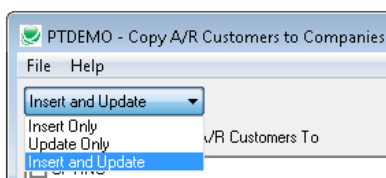
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Copy Customers

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:

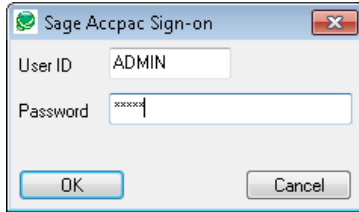
- Insert Only operation will only add customers, if the customer does not already exist.
- Update Only operation will only update customers that do exist.
- Insert and Update will perform both of these operations.

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

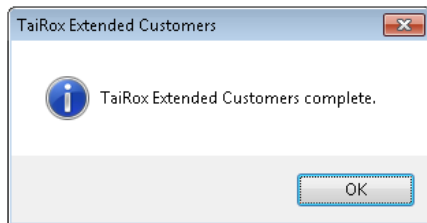
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Copy Customers

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.

