

# Extended Inventory Items

Extended Inventory Items is an enhanced replacement for the Sage I/C Items screen. It provides you with more functionality for adding and maintaining inventory items, and lets you copy existing item records to other Sage 300 company databases.

## Extended Inventory Items lets you:

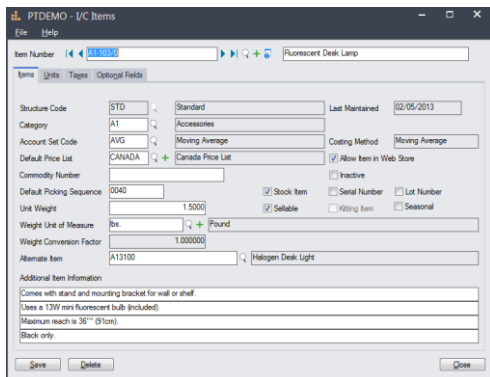
- Look up items quickly with the Item SmartFinder, specifying one or more words in a browser-like search field.
- Check whether items with zero quantities are being referenced by Sage 300 modules before deleting them (such as in old sales orders or purchase orders).

The Item in Use button at the bottom of the form checks for all references to items throughout Sage 300 modules to make sure that deleting items will not cause integrity errors.

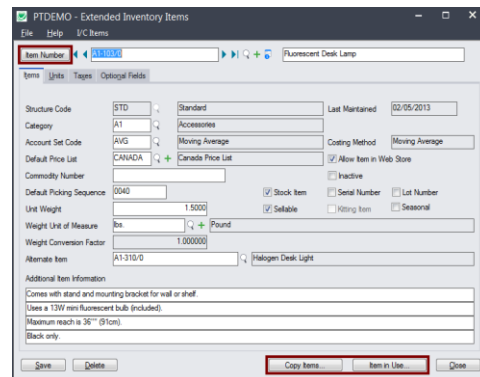
- Maintain a full or partial set of inventory items across multiple Sage 300 companies using the Copy Items functionality.
  - Specify a range of items from the current company, filter them by additional criteria, cherry-pick items from the results, and then copy the final set to other associated Sage 300 companies.
  - Select or de-select companies on an individual basis.
  - Update item descriptions only.
  - Display a full log of updated items.

The following screens show the extra features provided by the Extended Inventory Items screen:

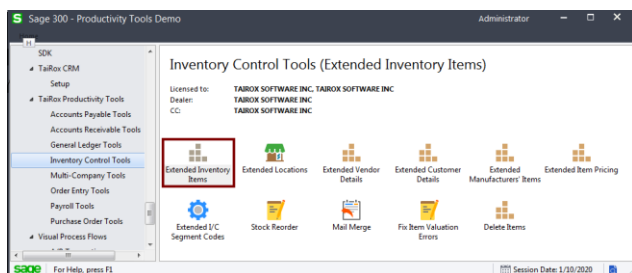
Sage I/C Items screen



TaiRox Extended Inventory Items screen

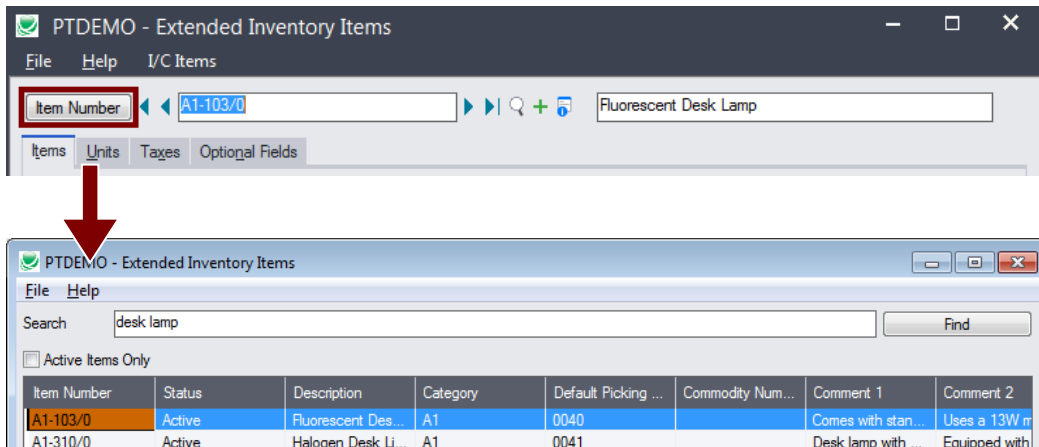


The Extended Inventory Items icon appears under **TaiRox Productivity Tools > Inventory Control Tools** on the Sage 300 desktop and can be copied to other menu locations.



## Using the Item Number SmartFinder button

Click the Item Number button to open the SmartFinder for items.



The Item SmartFinder provides a Search field for entering search words and a selection grid with the search results.

- Enter one or more words or word fragments in the Search field to search multiple tables and fields.
- Click the checkbox to search for Active items only.
- Search returns items that contain the search string in any of the searched fields.

In the example above, “desk lamp” appears in the description for one item and in the comment field for the other item. Both items are displayed.

### Note:

- *All of the word fragments must be present in one of the fields being searched.*  
For example, if you searched for “desk lamp”, you will not see an item where only “desk” is in the Description field and only “lamp” is in the Comment 1 field.
- **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".

## Copy Inventory Items to other Sage 300 companies

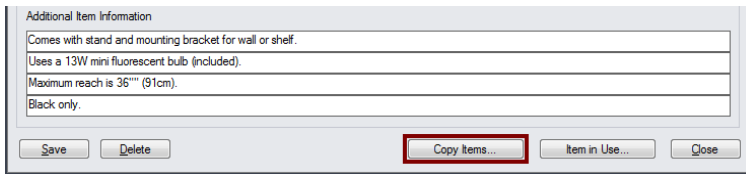
### IMPORTANT:

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

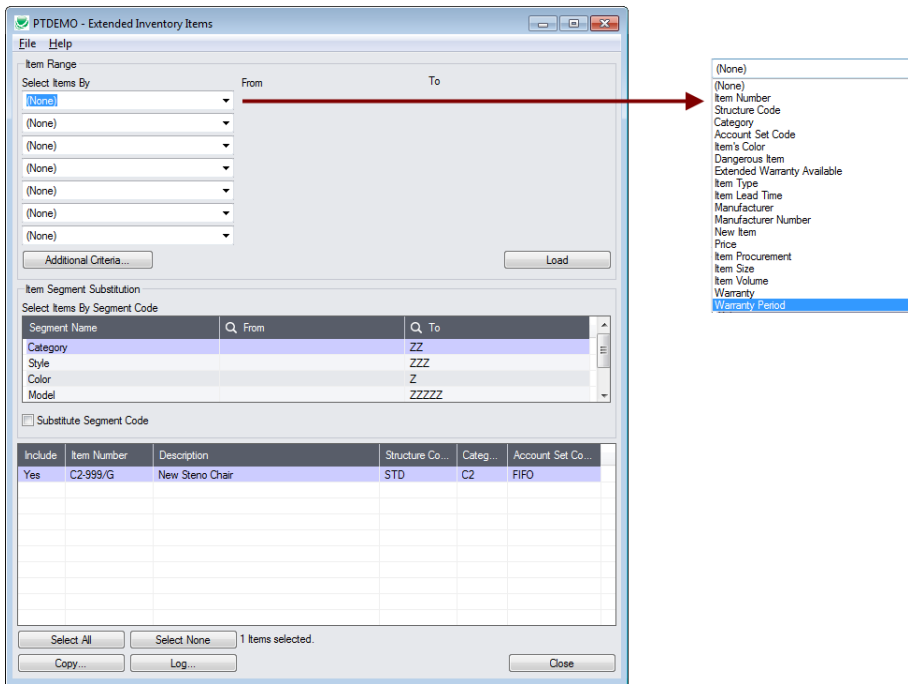
If you are inserting new items into other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the inventory items that you want to copy.
  - Copy Items operates from within an existing "source" company, and lets you copy item information to other Sage 300 company databases.

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



When the Copy Items button is pressed, a window will pop up for selecting inventory items in the current (source) company.

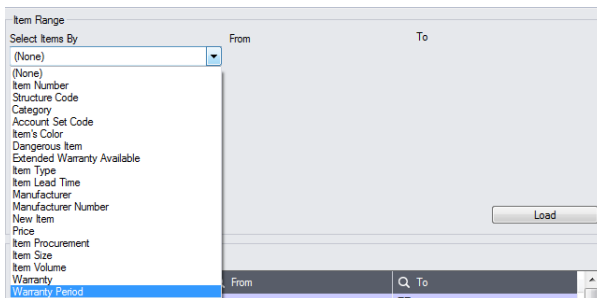


**Note:** By default, the grid at the bottom of the form will display new items that were added in this session. This allows you to copy these new items directly to other Sage company databases.

**To copy or update any set of items,** start at the top of the form to specify the range of inventory items that you want to copy or update. The program displays the last set of ranges and filters used for copying and updating items. Click the Load button to use the previous settings.

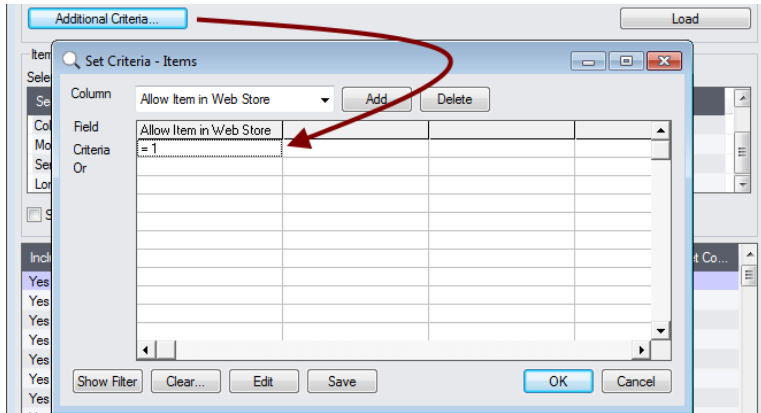
### Specify range of inventory items for copying:

You can specify ranges for up to seven inventory item fields to use for item selection – including the item number, structure code, category, account set, or any of the optional fields that you use for inventory items.



- The screen above shows a number of optional fields that you can use for item selection.

### Choose additional criteria:



- Click the Additional Criteria button to use any inventory item field to filter items for copying. Click OK to save.

### Select items using ranges of segment codes:

You can specify ranges for all of the item segment codes that are used for inventory.

For example, the following screen shows that only items in category A1 will be included.

Segment Name	From	To
Category	A1	A1
Style		ZZZ
Color		Z
Model		ZZZZZ

### Substitute segment codes when copying:

This checkbox lets you copy a group of items with one segment code value to create a new group of items with a new segment value.

For example, if one of your item number segments shows the item color, you can copy an existing set of “Black” items to a new set of “Silver” items.

- The new segment values must already be added to Inventory Control using the TaiRox Extended I/C Segment Codes form or the Sage I/C Segment Codes form.  
For example, if you are adding items with a new color code “L”, you must add the “L” segment code before you copy inventory items using item substitution.
- **Extended Inventory Items allows copying from a company to itself.** If other companies are selected, the operation will only be performed on those companies that have the target segment code. All exceptions will be logged.

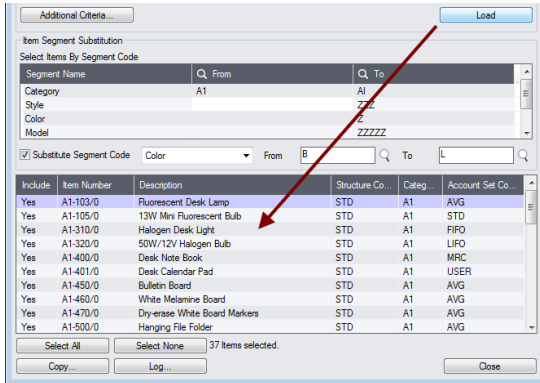
For example, the following screen shows that all items with “B” (black) Color segment codes will be copied to new item records with “L” (silver) Color codes.

Substitute Segment Code    Color    From    B    To    L

- Select the Substitute Segment Code checkbox, choose the segment that you want to substitute values for, and then specify the source and target values.

**Load the list of Inventory Items and choose which ones to copy:**

- Click the Load button to display the list of Inventory Items.  
When the Load button is pressed, the program will display the inventory items in the item and segment ranges and with the additional criteria that you specified.
  - You can adjust the ranges 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 items loaded in the grid for copying.

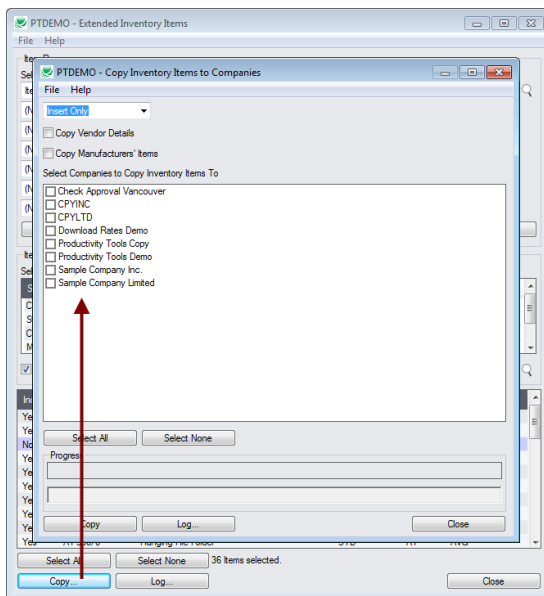


- Double-click in the Include column to “cherry-pick” Inventory Items:

Include	Item Number	Description	Structure Co...	Categ...	Account Set Co...
Yes	A1-103/0	Fluorescent Desk Lamp	STD	A1	AVG
Yes	A1-105/0	13W Mini Fluorescent Bulb	STD	A1	STD
No	A1-310/0	Halogen Desk Light	STD	A1	FIFO
Yes	A1-320/0	50W/12V Halogen Bulb	STD	A1	LIFO

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

When you are happy with the set of items that you have selected, click the Copy button at the bottom of the screen.



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

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

For example, choose Update Only to update address and contact information for all items.

- Choose whether to insert, insert and update, or just update inventory items.
  - Insert Only will add codes if the code does not already exist. It will not change existing codes.
  - Update Only will only update codes that do exist – but not add new ones. If updating codes only, you can also choose to update the description only.
  - Insert and Update will perform both of these operations.

## Specify which data to update/insert:

- Choose which data you want to update or insert – item descriptions, vendor details or manufacturers' item details.
  - Update Item Description Only appears for Update Only. If you choose it, the other two “Copy” choices will not be available.

This checkbox will change item descriptions only – it doesn't matter whether other item properties match.

- Note that Copy Vendor Details and Copy Manufacturers' Items **are not selected** by default.
- Except for the special case of changing the description only, an update operation will attempt to change the item in the target company to be just like the item in the source company.

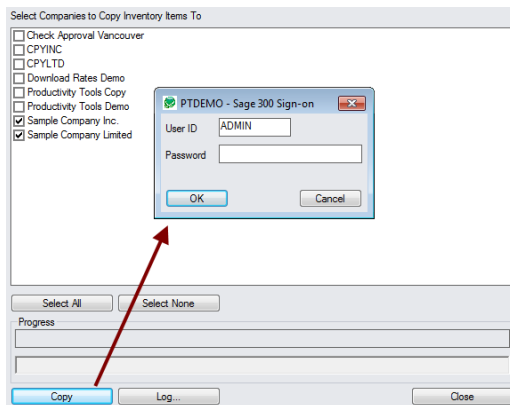
In order to do so, it will delete various properties (such as Optional Fields) from the target item and then add the properties from the source item. It's possible for the update to fail if properties don't match or items are in use.

## Select target Sage companies:

- Click the Select All and Select None buttons at the bottom of the form 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 items:



- 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 inventory items in the target companies for copying to proceed.
- The program will copy the inventory item information to the target companies.
- If no changes are required for a selected item, no update will be performed – so the audit stamp will be preserved.
- If you cancel the operation during the copying process, you must check the log to see which procedures were completed and assess how you want to continue.

## Click the Log button to confirm which Inventory Items were processed:

```

7/23/2020 8:53:04 AM Copy Inventory Items to Companies started.
7/23/2020 8:53:04 AM
7/23/2020 8:53:04 AM Logged in user: ADMIN
7/23/2020 8:53:04 AM Performed by user: MORGAN
7/23/2020 8:53:04 AM
7/23/2020 8:53:04 AM Update Only
7/23/2020 8:53:04 AM Update Item Descriptions Only: No
7/23/2020 8:53:04 AM Item segment Color B is being substituted by Color L
7/23/2020 8:53:04 AM Copy Inventory Items to Companies: Sample Company Limited
7/23/2020 8:53:07 AM
7/23/2020 8:53:07 AM Copying items from Productivity Tools Demo to Sample Company Limited
started.
7/23/2020 8:53:07 AM      Logging in to Sample Company Limited...
7/23/2020 8:53:08 AM      Updating item A1-103/0...
7/23/2020 8:53:08 AM      Item updated.
      ....
      ....
      ....
7/23/2020 8:53:09 AM      Item A1-750/G does not exist. Item not updated.
7/23/2020 8:53:09 AM      Updating item A1-755/G...
7/23/2020 8:53:09 AM      Updating item A1-800/0...
7/23/2020 8:53:09 AM      Item updated.
7/23/2020 8:53:09 AM      Inserting item A1900B as A1900L...
      ....
      ....
      ....
7/23/2020 8:53:10 AM      Item A2 (IMAGE-1500)G does not exist. Item not updated.
7/23/2020 8:53:10 AM      Updating item A2 (QUEEN-STAR)0...
7/23/2020 8:53:10 AM      Item updated.
7/23/2020 8:53:10 AM      Logging off of Sample Company Limited...
7/23/2020 8:53:10 AM
7/23/2020 8:53:10 AM      There was 28 items updated.
7/23/2020 8:53:10 AM      There was 8 items not updated.

```

```

7/23/2020 8:53:10 AM Copying items from Productivity Tools Demo to Sample Company Limited
complete.
7/23/2020 8:53:10 AM
7/23/2020 8:53:10 AM Copy Inventory Items to Companies complete.
7/23/2020 8:53:10 AM
=====

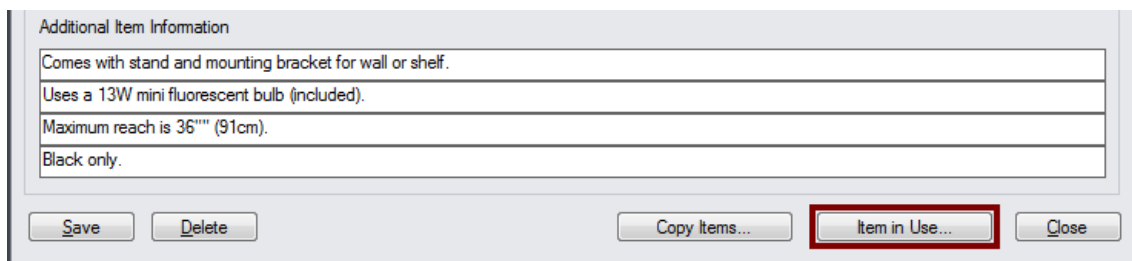
```

The Log lists:

- The user, the type of operation performed, and the range of items.
- Each item that was processed and whether the items were updated or inserted.

## Using the “Item In Use” button to check Inventory Items

The Item in Use button at the bottom of the Extended Inventory Items form lets you check if you can safely delete inventory items from the Inventory Control system.



Sage 300 allows inventory items to be deleted as long as there are no quantities in stock – however, this can be a problem.

- Even when item quantities are zero, item numbers can still appear in orders or purchase orders or historical data that has yet to be purged.
- If an item is deleted when it is still referenced in other modules, the integrity checking program will flag these references as errors, and some operations in Sage 300 may not behave as expected. In addition, some reports will display incomplete or inaccurate data.

The "Item in Use" button in Extended Inventory Items lets you check whether or not an item is being referenced in such a way that deleting the item would cause integrity errors.

### To check whether items are in use or can be deleted

- Select the item in Extended Inventory Items.
- Click the Item in Use button at the bottom of the form.
- Click the “Check” button at the bottom of the pop-up Item in Use form.

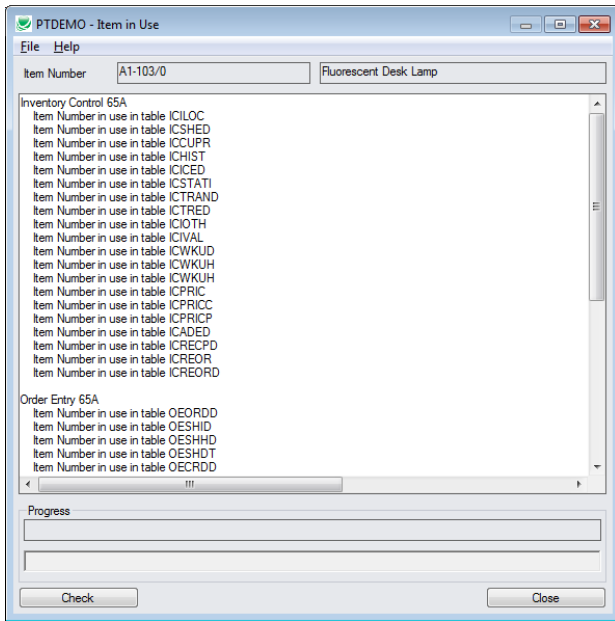
The program will check all core modules and known third-party modules will be checked for references to the selected item.

If unknown third-party applications are present, they will also be listed, along with a message advising you of a possible risk with deleting the inventory item:

**Extended Inventory Items has encountered the following applications that are not supported. Deleting items should only be performed if the unsupported applications do not use items in Inventory Control.**

Any tables referencing the item – for which deleting the item would cause integrity errors – will be listed, as shown below:





If no tables are listed (as below), the item may be deleted without causing integrity errors (subject to a warning concerning unknown-third party applications).

