

Extended Inventory Items

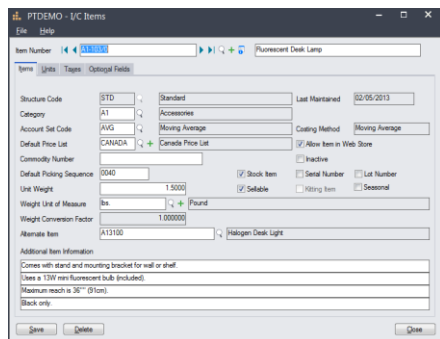
Extended Inventory Items is an enhanced replacement for the Sage I/C Items screen. It provides you with more functionality for adding and maintaining inventory items, and lets you copy existing item records to other Sage 300 company databases.

Extended Inventory Items lets you:

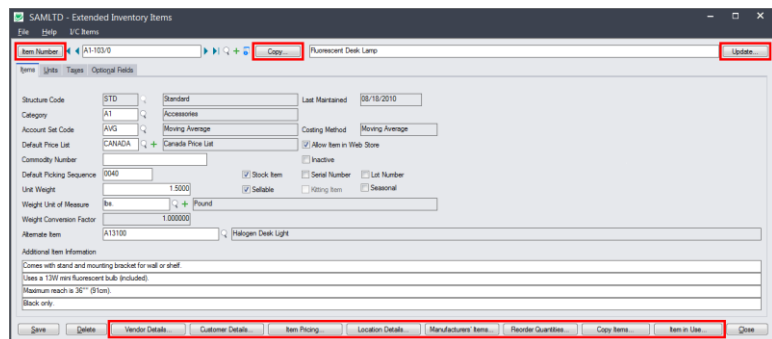
- Look up items quickly with the Item SmartFinder, specifying one or more words in a search field.
- Copy a single inventory item, making it easy to add items with several colors or finishes.
- Check whether items with zero quantities are being referenced by Sage 300 modules before deleting them (such 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.
- Drill down to Extended Vendor Details to check or enter item costs, Extended Customer Details for customer item numbers, Extended Item Pricing, Extended Location Details, Extended Manufacturers' Items to enter manufacturers' item numbers, and Extended Reorder Quantities.
- 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 Sage 300 companies.
 - Select or de-select companies on an individual basis.
 - Update item descriptions only.
 - Display a full log of updated items.
- Automatically update item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions.
- Use the Update button to synchronize item descriptions in Sage 300 and AutoSimply tables.

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

Sage I/C Items screen



TaiRox Extended Inventory Items screen



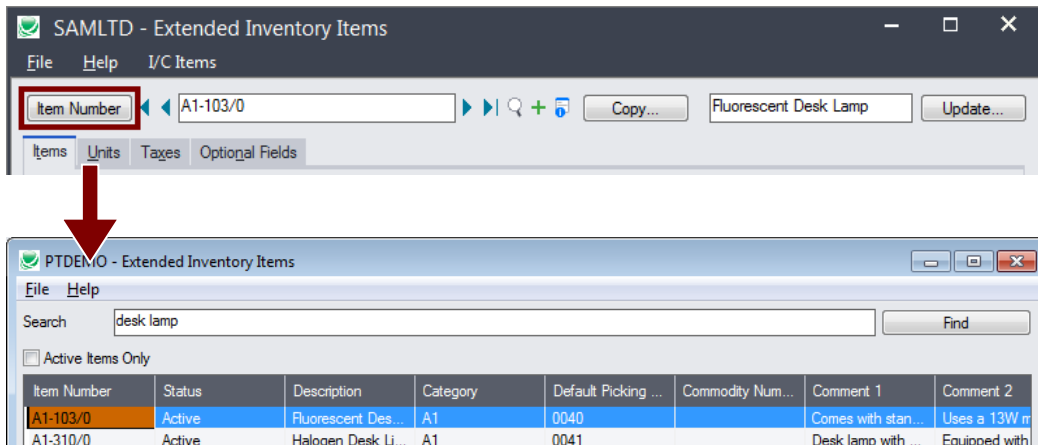
Note: You may need to maximize the Extended Inventory Items screen to see all of the Sage 300 and TaiRox Productivity Tools buttons at the bottom of the screen.



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".

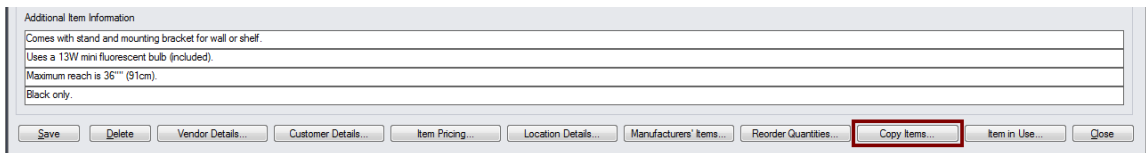
Copy Inventory Items to other Sage 300 companies

IMPORTANT:

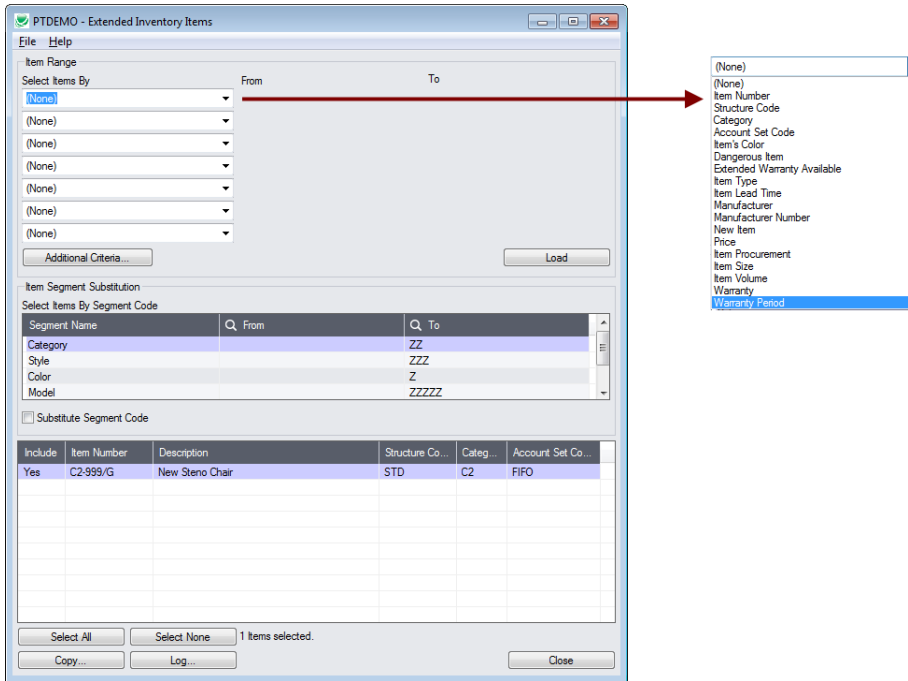
You must enter a User ID and Password to copy item information. Make sure the User ID has sufficient rights to complete the operation in the target companies.

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

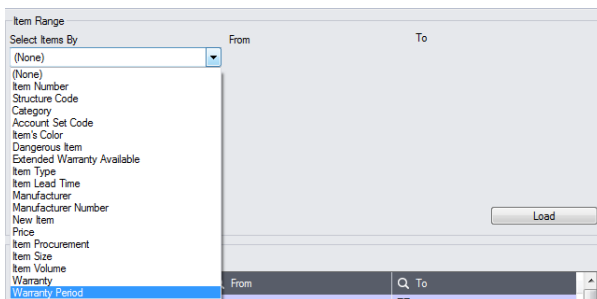


Note: By default, the grid at the bottom of the form will display new items that were added in this session. This allows you to copy these new items directly to other Sage company databases.

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.

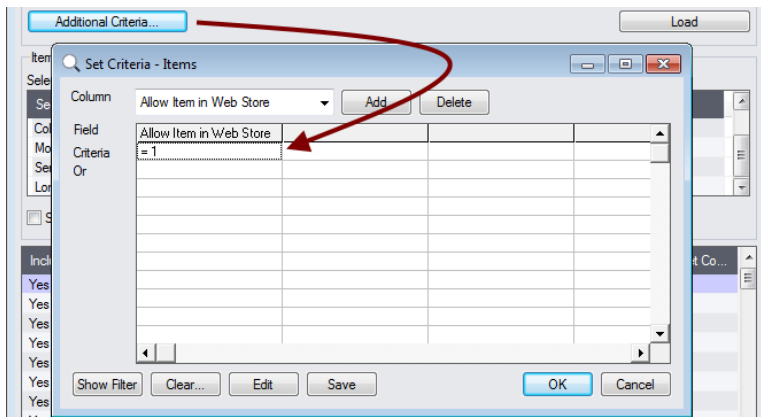
Specify range of inventory items for copying:

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

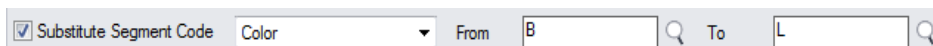
Substitute segment codes when copying:

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.



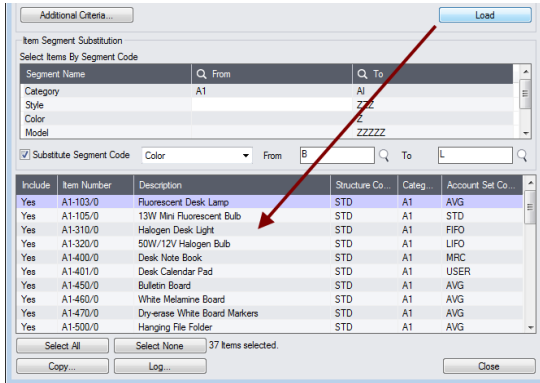
- Select the Substitute Segment Code checkbox, choose the segment that you want to substitute values for, and then specify the source and target values.

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.

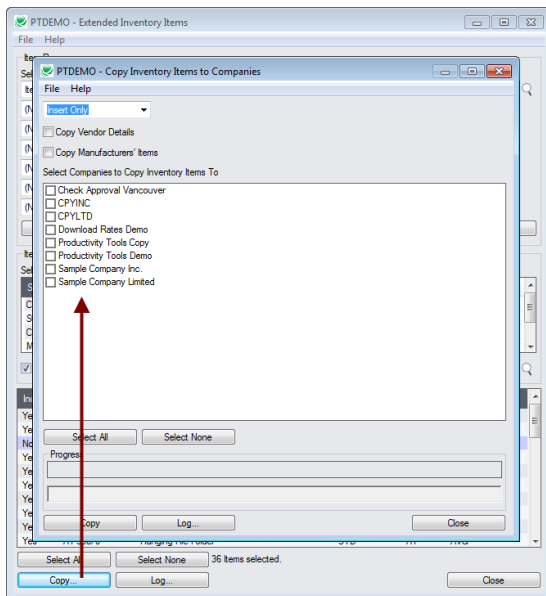


- Double-click in the Include column to “cherry-pick” Inventory Items:

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.

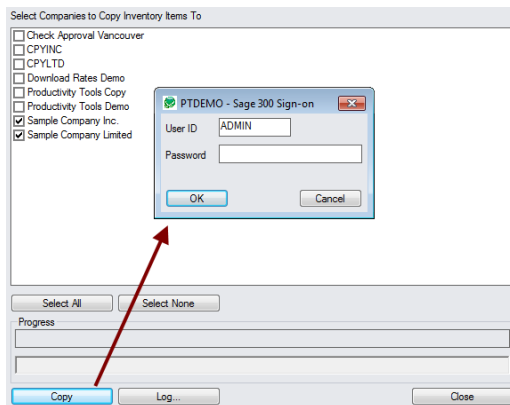
In order to do so, it will delete various properties (such as Optional Fields) from the target item and then add the properties from the source item. It's possible for the update to fail if properties don't match or items are in use.

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 8:53:10 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.

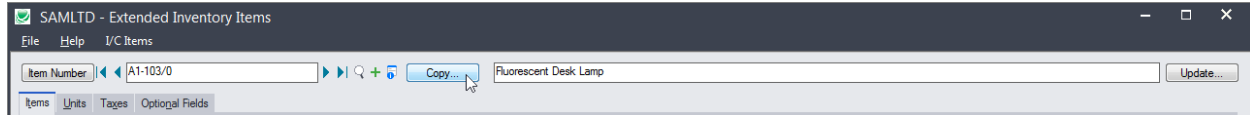
```

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.

Copy a single Inventory Item using the Copy button

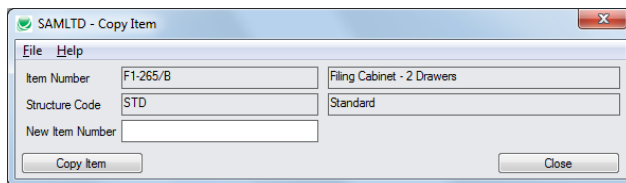
The Copy button at the top of the Extended Inventory Items form lets you copy the current inventory item to a new inventory item number. This is especially useful if you are adding items that come in a variety of colors or finishes.



To copy a single item

- Select the item that you want to copy.
- Click the Copy button (shown above).

The following form appears:



Note: If you have just updated the item, you must Save it before copying the item.

- Enter the new item number in the New Item Number field.
 - The new item number must use the same item number structure code as the original item. For example, you could copy item “F1-265/B” to new item number “F1-265/R”, where both use the same item number structure code.
 - You don’t need to enter the segment separator characters.
- Click the Copy Item button to continue.
- Click the Add button on the Extended Inventory Items screen to add the inventory item.

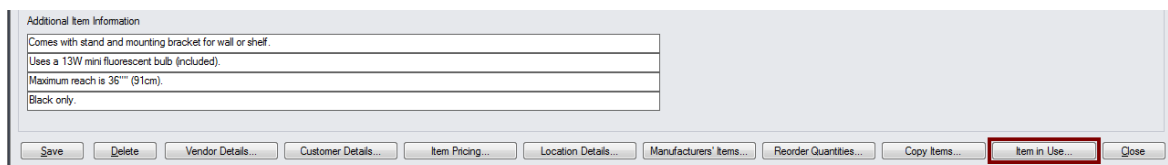
The new item record includes all the information from the original item – except that it lists the original item as an “Alternate Item”.

After copying

- Check that the information on the new record is correct – such as the picking sequence, alternate item, and optional fields.
- Click the Copy Items button at the bottom of the screen to copy the new inventory item to other company databases.

Use 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

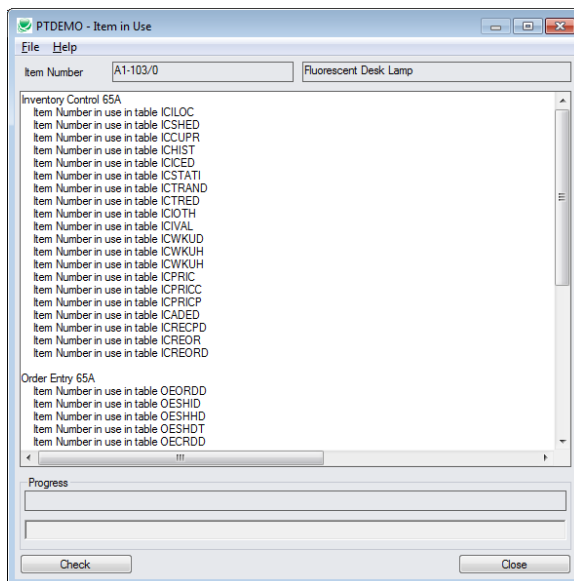
- Select the item in Extended Inventory Items.
- Click the Item in Use button at the bottom of the form.
- Click the “Check” button at the bottom of the pop-up Item in Use form.

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

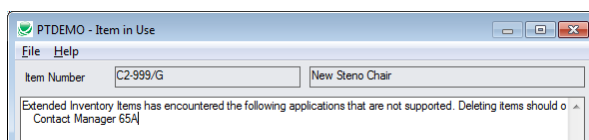
If unknown third-party applications are present, they will also be listed, along with a message advising you of a possible risk with deleting the inventory item:

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:

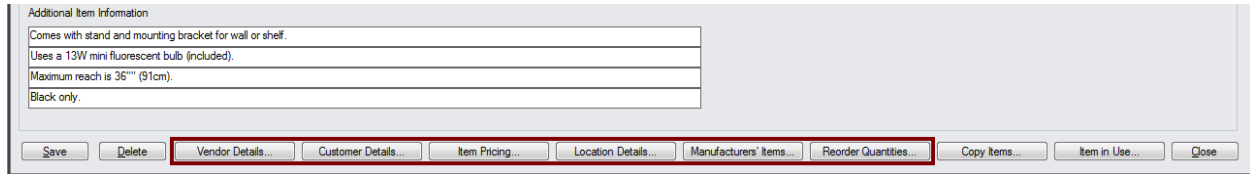


If no tables are listed (as below), the item may be deleted without causing integrity errors (subject to a warning concerning unknown-third party applications).



Drill Down to Vendor, Customer, Pricing & Location Details

Extended Inventory Items provides direct access to all the information that you maintain for inventory items. Click the buttons at the bottom of the screen to display or edit the following information for the current item.



Vendor Details: View/edit vendors linked to inventory items, and view/edit item costs.

Customer Details: View/edit item numbers that your customers use for your inventory items.

Item Pricing: View/add items on price lists, view/edit discount or markup information, view/assign tax authorities and tax classes to inventory items.

Location Details: Check/update locations where stock items, view/update costing information, view quantities on PO and sales orders, and view/edit last item cost.

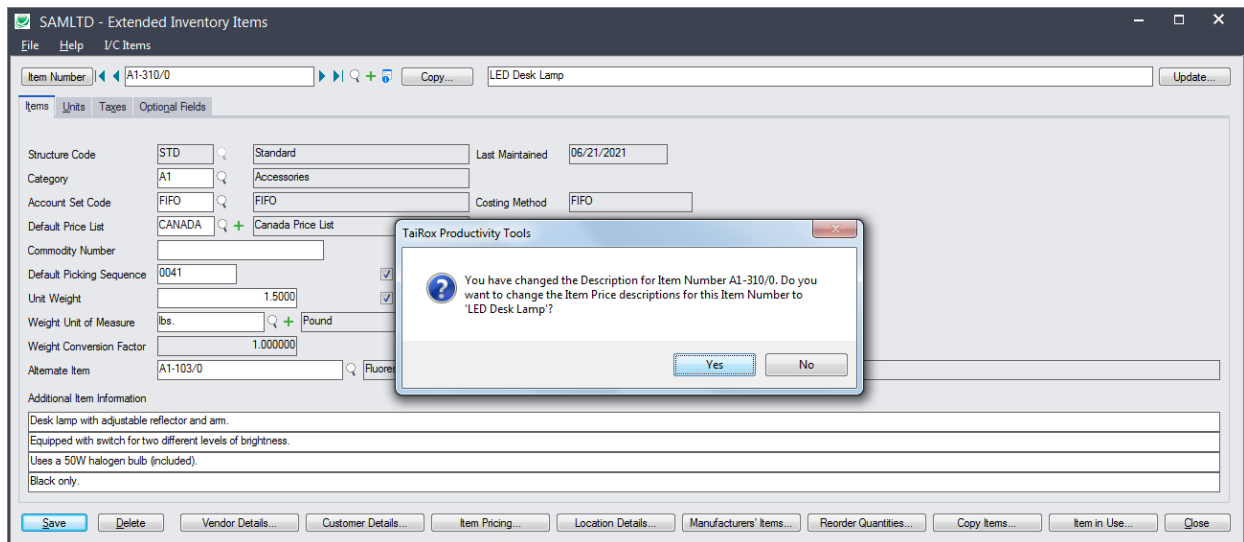
Manufacturers' Items: View/add numbers to the items in your inventory (such as UPC bar codes).

Reorder Quantities: View/edit reorder information for inventory items.

Automatically Update Item Descriptions on Price Lists, other Sage 300 Tables, and in AutoSimply BOMs

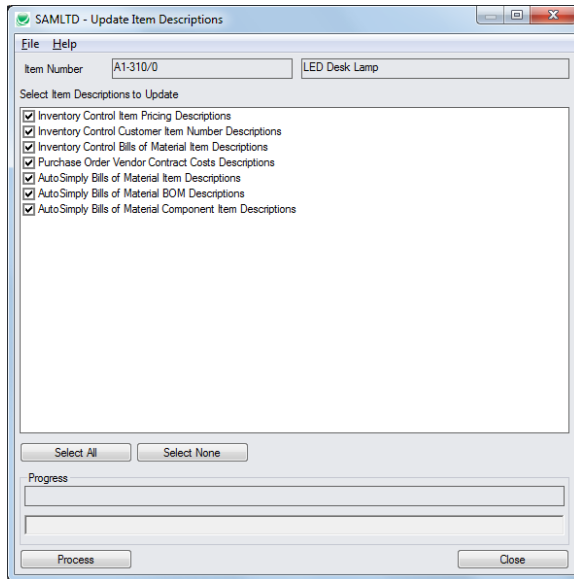
Extended Inventory Items will automatically update item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions.

In the following example, the description "Halogen Desk Light" has been changed to "LED Desk Lamp".



- When you click the Save button, the program will display the message displayed above: "You have changed the description for Item Number nnnnnnnn. Do you want to change the Item Price descriptions for this Item Number to "XXXXXXXX"?"

- If you click the Yes button, the program will display the following screen to let you update price list descriptions, and well as other descriptions associated with the item:



- Click the Select All and Select None buttons at the bottom of the form to select the descriptions that you want to update.



- Use the checkboxes to complete your selection.
- Click the Process button to update all item descriptions.

Other screens in Sage 300 – such as Item Pricing screens – will now show the updated item descriptions:



Use the Update Button to Synchronize Item Descriptions on Price Lists, in other Sage 300 Tables and in AutoSimply BOMs

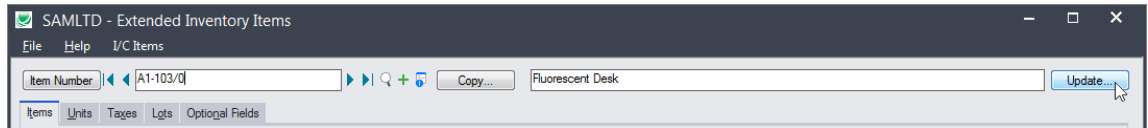
Extended Inventory Items automatically updates item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions. (See the above section for a description of the auto-update feature.)

However, if you previously updated item descriptions, and the descriptions are now out of synch with descriptions on other Sage 300 and AutoSimply screens, you can use the Update button on the Extended Inventory Items screen to manually update the item descriptions.

For example, if the item descriptions for customer item numbers or on AutoSimply BOMs do not match the descriptions in the Inventory Item record, follow these steps to synchronize the item descriptions.

To use the Update button to update item descriptions

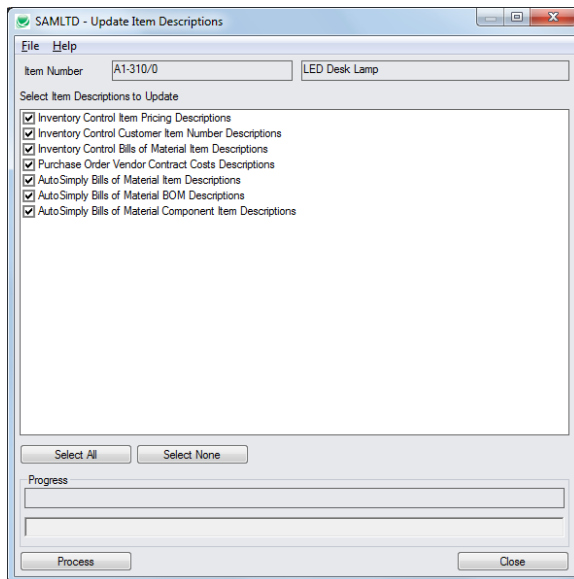
- Select the item with the item description that you want to synchronize on other screens.



- Click the Update button beside the item description.

Note: If you have just updated the item, you must Save it first.

- The program will display the following screen to let you update price list descriptions, and well as other descriptions associated with the item:



- Click the Select All and Select None buttons at the bottom of the form to select the descriptions that you want to update.

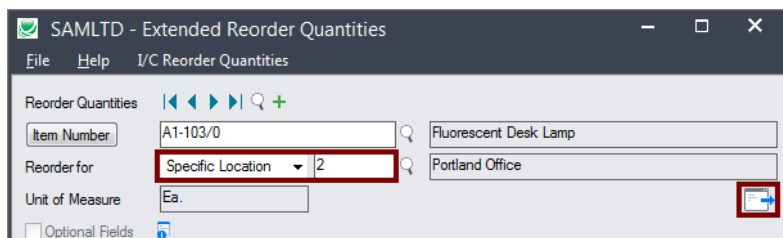


- Use the checkboxes to complete your selection.
- Click the Process button to update all item descriptions.

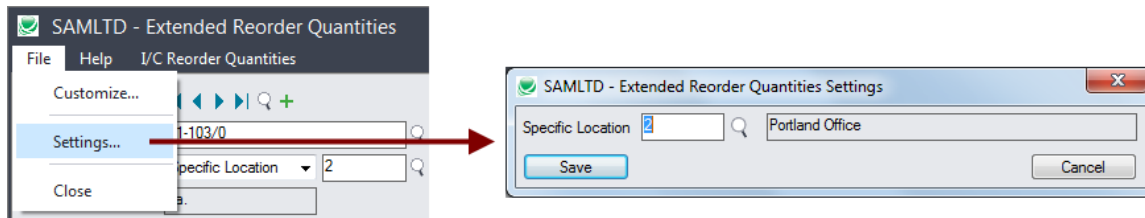
Set a Default “Specific Location” for Reorder Quantities

You can set a default specific location for Reorder Quantities, so when you click the Reorder Quantities button, the Reorder Quantities screen will display the current inventory item and the default specific location.

Click the Go button to view/edit the reorder quantities.



Use the Settings choice on the Extended Reorder Quantities File menu to set a default location for the “Specific Location” field on the Extended Reorder Quantities field.



- Select File > Settings from the Extended Reorder Quantities File menu.
- Select the Specific Location that you want to appear by default, and choose Save.
Leave the field blank if you do not want to set a default location.

Note: The Extended Reorder Quantities program can be launched from the Sage 300 Desktop – as well as from the Reorder Quantities button at the bottom of the Extended Inventory Items screen.

There are two separate default settings – one when you launch from the Desktop, and one when you launch from Extended Inventory Items. If you want the same default location to appear no matter where you launch the program, make sure to open both instances of the program and change the settings for each one.

Note also that properties are saved separately for each user ID.