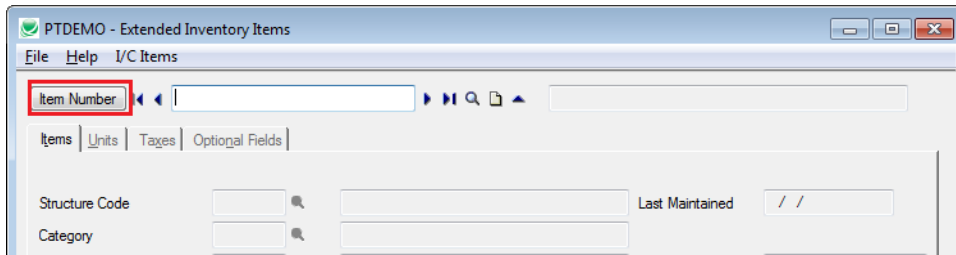


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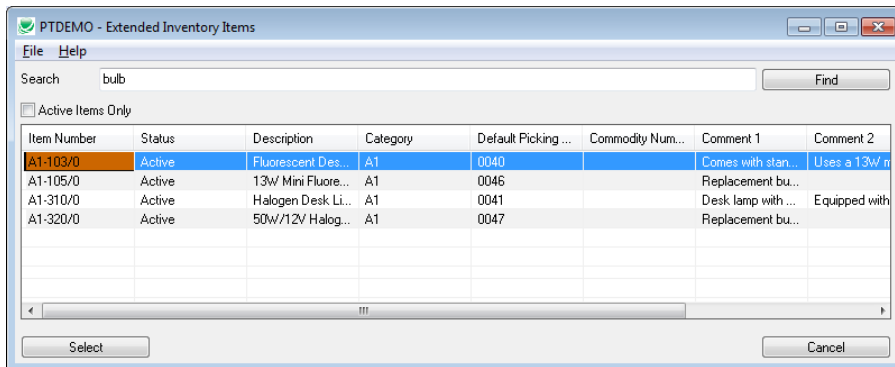
Extended Inventory Items - SmartFinder

The SmartFinder is launched from the button that has replaced the label on a standard form.



Searching: Enter a few word fragments in the entry field and the items table will be searched. Many fields will be searched simultaneously. All of the word fragments must be present in one of the fields being searched.

Selection: Selecting from the grid will enter the item number into the standard form.



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Extended Inventory Items - Item in Use

Sage 300 allows inventory items to be deleted if there are no quantities in stock. There may be other references to that item in the database: in orders, purchase orders and historical data that has yet to be purged. When an integrity checking program is run, these references will be flagged as errors and certain operations may not behave as expected. Reports may show incomplete or inaccurate values.

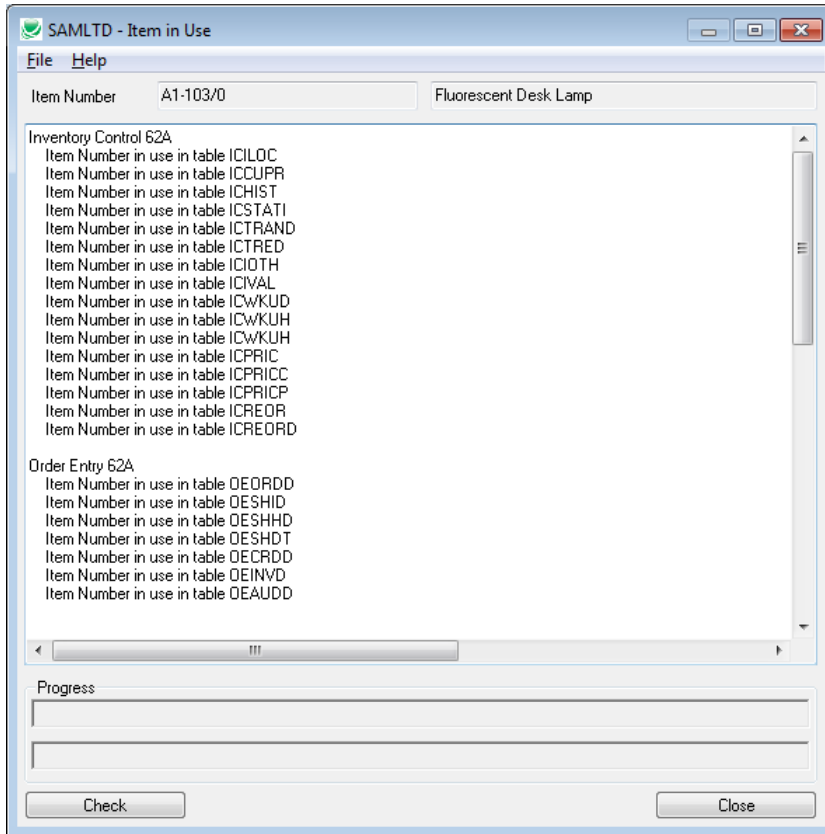
Extended Inventory Items provides an "Item in Use" button that will check whether or not an item is being referenced in such a way that deleting the item would cause integrity errors. The Item in Use button is at the bottom of the form:

The screenshot shows a software window titled "PTDEMO - Extended Inventory Items". The window contains a form for editing an inventory item. At the top, there is a menu bar with "File", "Help", and "I/C Items". Below the menu bar, there is a search bar for "Item Number" with the value "A1-103/0" and a text field for the item name "Fluorescent Desk Lamp". The form is divided into several sections: "Items", "Units", "Taxes", and "Optional Fields". The "Items" section contains various fields for item details, including Structure Code (STD), Category (A1), Account Set Code (AVG), Default Price List (CANADA), Commodity Number, Default Picking Sequence (0040), Unit Weight (1.5000), Weight Unit of Measure (lbs.), Weight Conversion Factor (1.000000), and Alternate Item (A13100). There are also checkboxes for "Stock Item", "Sellable", "Inactive", "Serial Number", "Lot Number", "Kitting Item", and "Seasonal". The "Optional Fields" section includes "Last Maintained" (02/05/2013), "Costing Method" (Moving Average), and "Allow Item in Web Store" (checked). At the bottom of the form, there is a section for "Additional Item Information" with several lines of text: "Comes with stand and mounting bracket for wall or shelf.", "Uses a 13W mini fluorescent bulb (included).", "Maximum reach is 36\" (91cm).", and "Black only.". At the bottom of the window, there are several buttons: "Save", "Delete", "Copy Items...", "Item in Use...", and "Close".

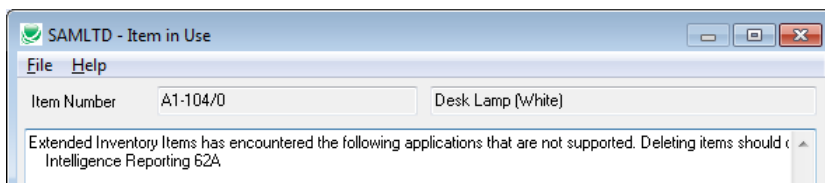
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Extended Inventory Items - Item in Use

When pressed a pop-up form will be displayed, click on the Check button. All core modules and known third party modules will be checked. If unknown third party applications are present, they will be listed. Any tables referencing the item - for which deleting the item would cause integrity errors - will be listed, as shown here:



If no tables are listed (as below), the item may be deleted without causing integrity errors, subject to any warning message (example shown) about unknown third party applications.



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Extended Inventory Items - Copy Items - Summary

Extended Inventory Items provides a mechanism for maintaining a full or partial set of inventory items across multiple companies - for Sage 300. Access is through a Copy Items button that has been added to the core I/C Items window. Items and companies can be filtered and "cherry-picked". Sophisticated error-checking protects against inconsistent operations. A full log of changed items is maintained.

There are important distinctions between adding an item into multiple companies, changing an item description in multiple companies and attempting to update all item properties across multiple companies (when a target item may already be in use). **See Important Notes regarding the operation to be performed in this document.**

Extended Inventory Items - Copy Items - Overview

Extended Inventory Items operates from within an existing ("source") company. When the Copy Items button is pressed, a window will pop up that allows filtering of items in that source company. The filtered items will be shown and can be selected or de-selected on an individual basis. Segment filtering and substitution is supported.

Pressing the Copy button on the pop-up window pop-ups up a list of ("target") companies to which those items can be copied. The companies can be selected or de-selected on an individual basis. Extended Inventory Items remembers the previously selected companies as a way to assist with the process. The operation to be performed (Insert Only, Update Only, Insert and Update) should be selected. Pressing the OK button will start the copy operation, first asking for the ADMIN user's password. This password entry provides a security checkpoint and insures that there will be sufficient rights to complete the operation. When the copy is complete the log may be reviewed by pressing the Log button.

Sage 300 business objects are used to perform the copying. Illegal copy operations are therefore blocked and errors placed in the log file. When no changes are required for a selected item, there is no update performed - so the audit stamp is preserved.

Running Extended Inventory Items - Copy Items

Once the TaiRox Productivity Tools are installed and activated, the Extended Inventory Items icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 desktop (and can be copied to other menu locations).

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Running Extended Inventory Items - Copy Items (continued)

When launched, Extended Inventory Items displays the core Sage 300 entry window with an additional button, “Copy Items”. All normal functions can be performed.

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

The screenshot shows a software window titled "PTDEMO - TaiRox Extended Inventory Items". The window has a menu bar with "File" and "Help". Below the menu bar, there is a search bar with "Item Number" and a dropdown menu showing "A1-104/0". To the right of the search bar, the item name "Fluorescent Desk Lamp (White)" is displayed. Below the search bar, there are tabs for "Items", "Units", "Taxes", and "Optional Fields". The "Items" tab is selected, and the following fields are visible:

Structure Code	STD	Standard	Last Maintained	18/11/2013
Category	A1	Accessories		
Account Set Code	AVG	Moving Average	Costing Method	Moving Average
Default Price List	CANADA	Canada Price List	<input checked="" type="checkbox"/> Allow Item in Web Store	
Commodity Number			<input type="checkbox"/> Inactive	
Default Picking Sequence	0040		<input checked="" type="checkbox"/> Stock Item	<input type="checkbox"/> Serial Number <input type="checkbox"/> Lot Number
Unit Weight		1.5000	<input checked="" type="checkbox"/> Sellable	<input type="checkbox"/> Kitting Item
Weight Unit of Measure	lbs.	Pound		
Weight Conversion Factor		1.000000		
Alternate Item	A1-103/0	Fluorescent Desk Lamp		

Below the fields, there is a section for "Additional Item Information" with a text area containing "Like A1-103/1 only in white". At the bottom of the window, there are buttons for "Save", "Delete", "Copy Items...", "Item in Use...", and "Close".

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Running Extended Inventory Items - Copy Items (continued)

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

PTDEMO - TaiRox Extended Inventory Items

File Help

Item Range

Select Items By

From To

Item Number (None) (None) (None) (None) (None) (None)

Additional Criteria... Load

Item Segment Substitution

Select Items By Segment Code

Segment Name	From	To
Category		ZZ
Style		ZZZ
Color		Z
Model		ZZZZ

Substitute Segment Code

Include	Item Number	Description	Structure Code	Category	Account Set Code
Yes	A1-104/0	Fluorescent Desk Lamp (White)	STD	A1	AVG

Select All Select None 1 Items selected.

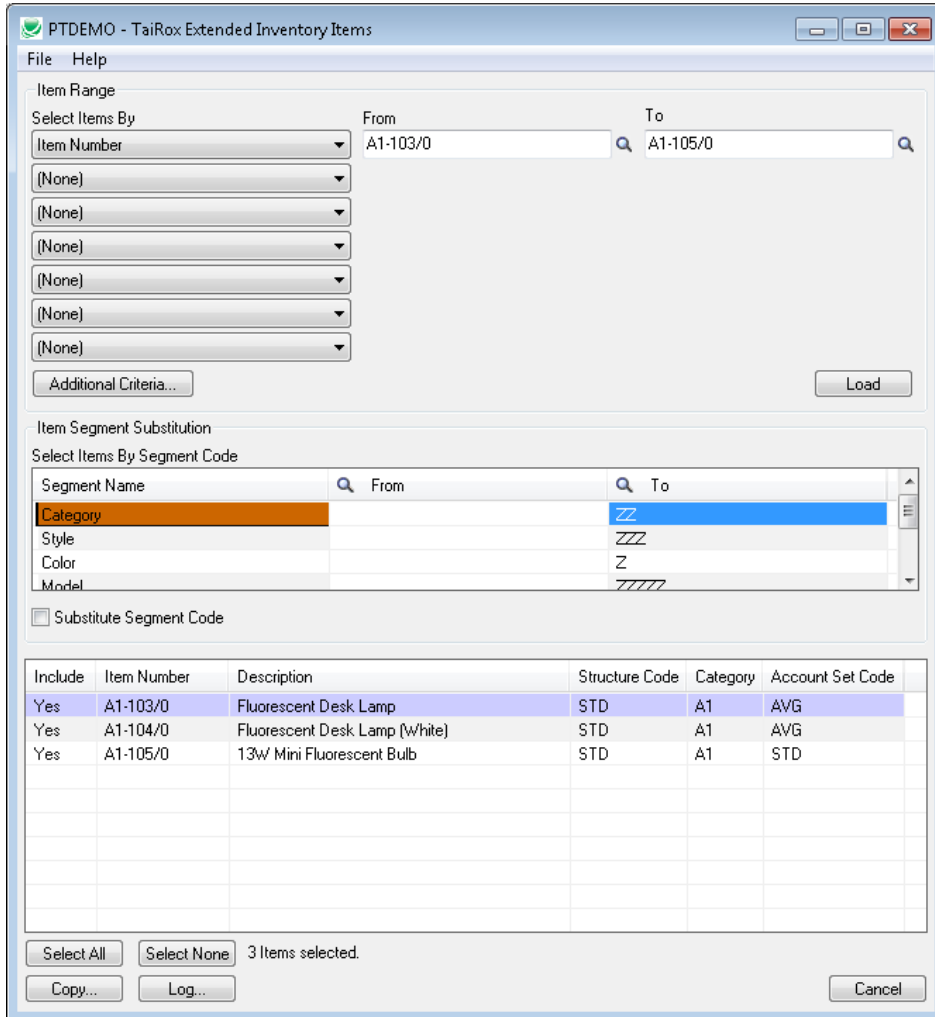
Copy... Log... Cancel

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

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Running Extended Inventory Items - Copy Items (continued)

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



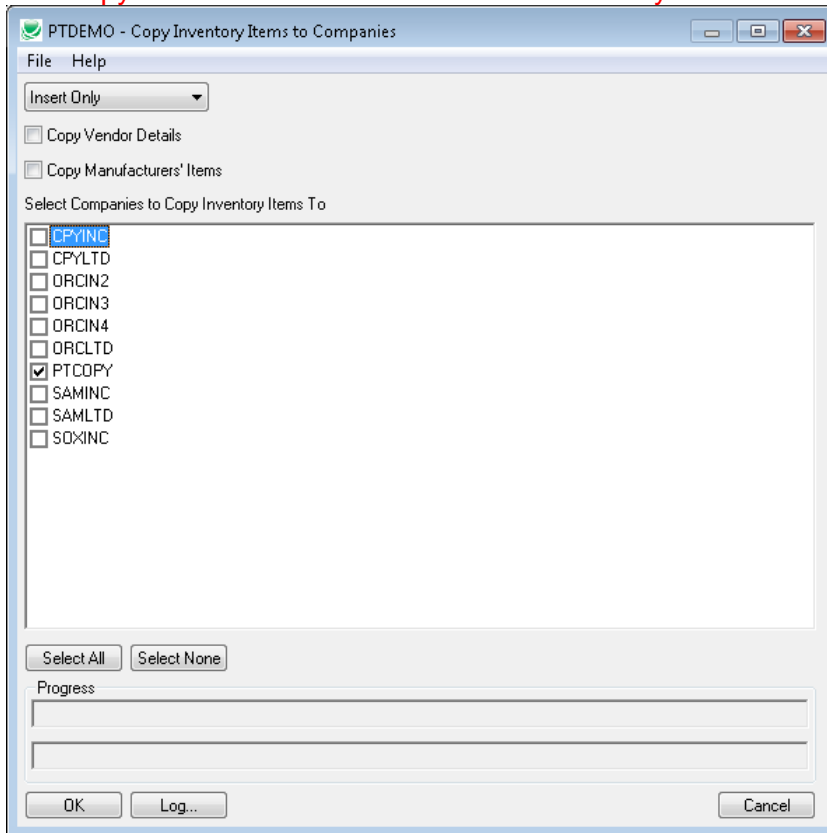
Note: Segment Substitution is covered as a separate topic in this document.

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

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Running Extended Inventory Items - Copy Items (continued)

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. **Note that the Copy Vendor Details and Copy Manufacturers' Items are not selected by default.**



Important Notes regarding the operation to be performed: Select the operation from a drop-down menu at the top of the window. An additional checkbox appears when "Update Only" is selected so that the simple operation - changing item descriptions - can be performed whether other properties match or not. **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, various properties (such as Optional Fields) are deleted from the target item and then properties from the source item are added. This may cause the update to fail if properties don't match or are in use.**



Operation to be Performed:

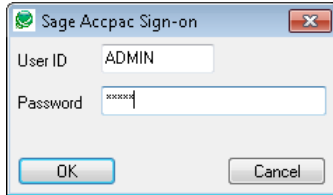
- Insert Only operation will only add items, if the item does not already exist.
- Update Only operation will only update items that do exist.
- Insert and Update will perform both of these operations.

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

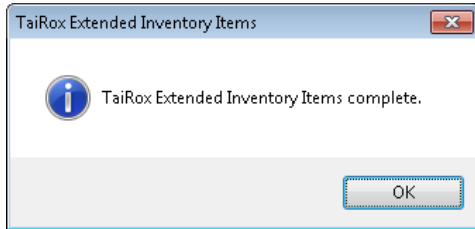
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Running Extended Inventory Items - Copy Items (continued)

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.

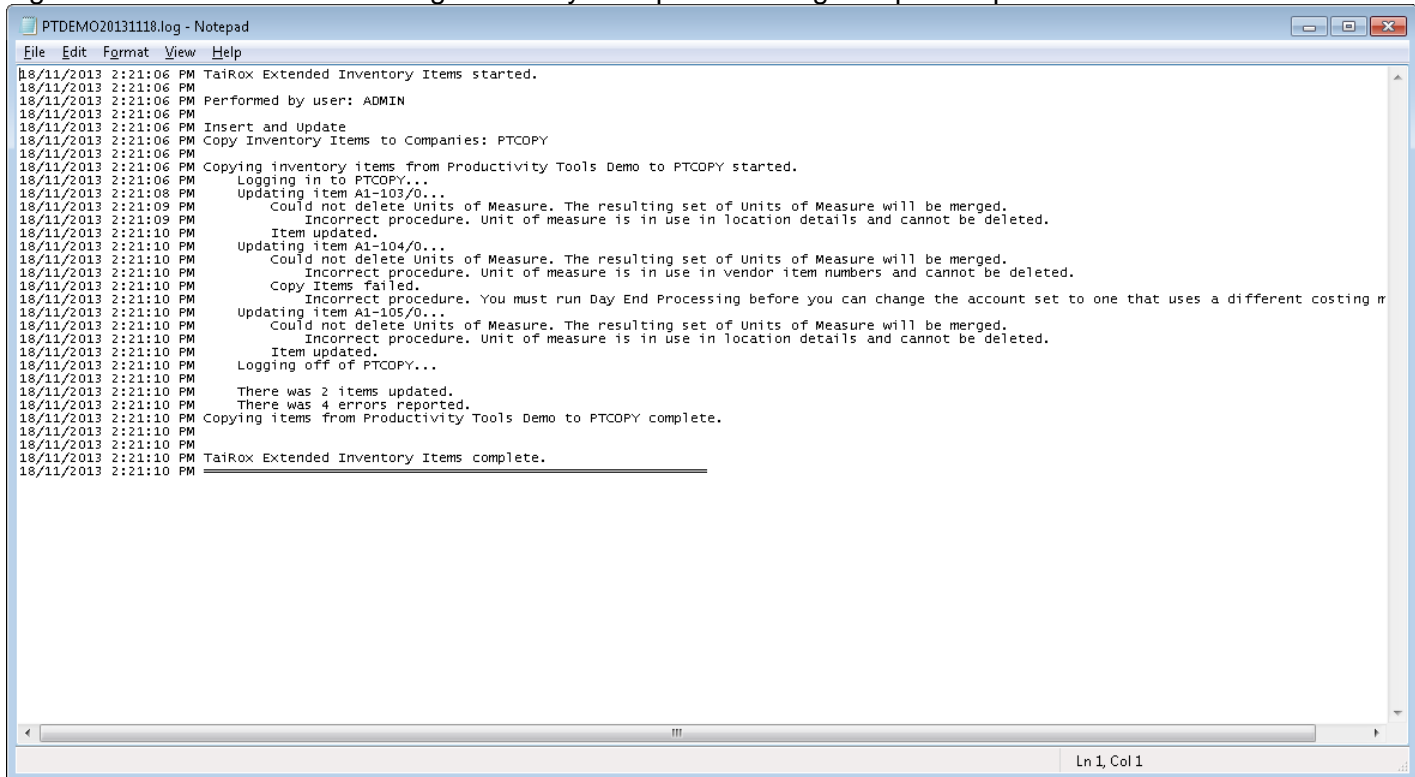


Progress will be displayed as the operation proceeds. Progress will be displayed and eventually the successful completion of the operation will be signaled by this window:



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.

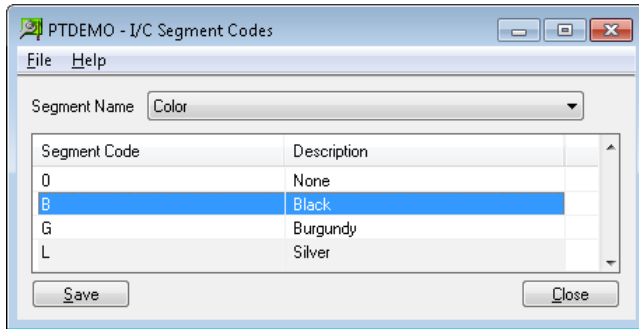
A log of operations performed (or not performed) is available from the Log button. The following log shows some errors or warnings that may be reported during an update operation.



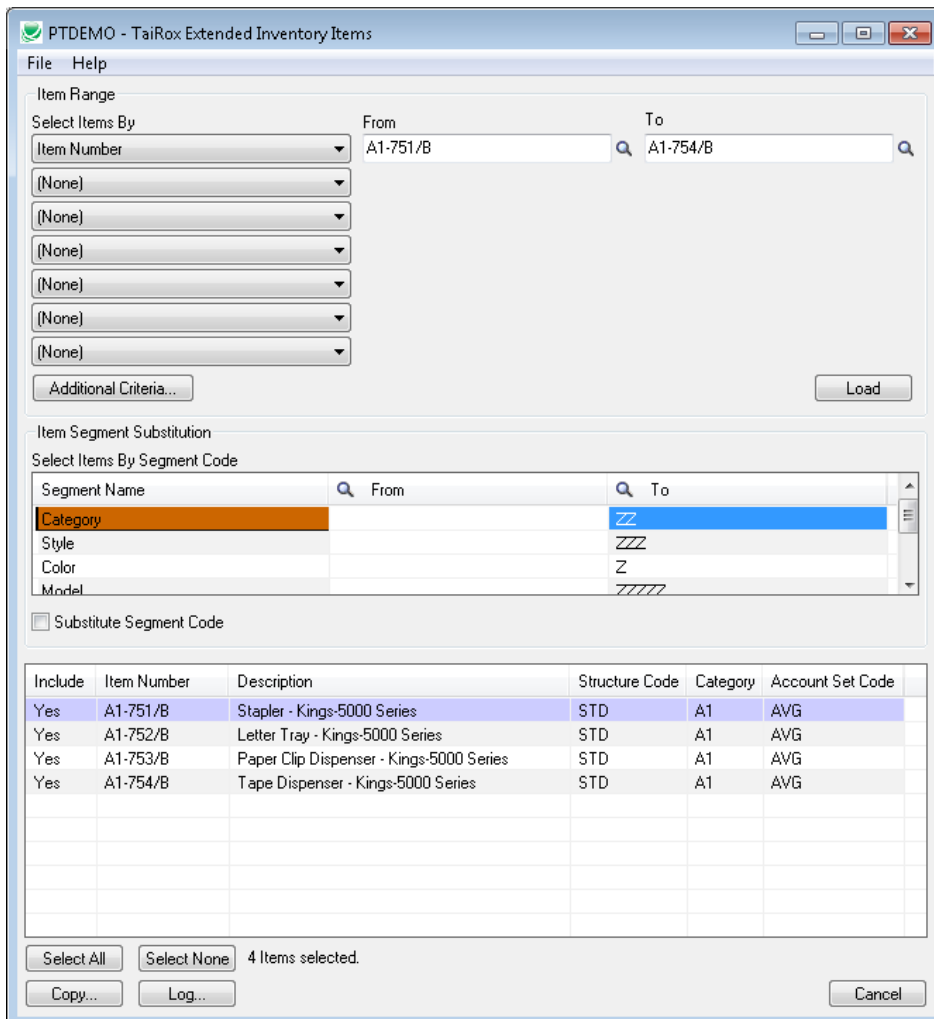
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Segment Substitution

Important Note: There are many different ways to arrange items and segments across multiple companies. This section illustrates how Extended Inventory Items can be used in one scenario. Suppose we have a segment named "Color" in the company PTDEMO and 2 of its codes are B (for Black) and G (for Burgundy).



Further suppose that we're adding items just like some existing Black items only with color Burgundy and we want these added into PTDEMO and another company PTCOPY. We can use the Copy Items function to filter a range of items, as shown here:



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Segment Substitution (continued)

If we click on the Substitute Segment Code checkbox, a substitution option will appear. We then specify that we want the items to be copied, substituting Color B with Color G.

The screenshot shows the PTDEMO - TaiRox Extended Inventory Items window. It features a menu bar with 'File' and 'Help'. The main area is divided into two sections: 'Item Range' and 'Item Segment Substitution'.

Item Range: This section allows selecting items by range. It includes a 'Select Items By' dropdown menu set to 'Item Number', and search fields for 'From' (A1-751/B) and 'To' (A1-754/B). Below these are several '(None)' dropdown menus and an 'Additional Criteria...' button. A 'Load' button is located at the bottom right of this section.

Item Segment Substitution: This section allows selecting items by segment code. It includes a 'Select Items By Segment Code' dropdown menu set to 'Color', and search fields for 'From' (B) and 'To' (G). Below these are several 'ZZ', 'ZZZ', 'Z', and 'ZZZZ' dropdown menus. A 'Substitute Segment Code' checkbox is checked, and a 'Color' dropdown menu is visible. A 'Load' button is located at the bottom right of this section.

Table: A table displays the selected items. The table has columns for 'Include', 'Item Number', 'Description', 'Structure Code', 'Category', and 'Account Set Code'. The first row is highlighted in orange, and the second row is highlighted in blue.

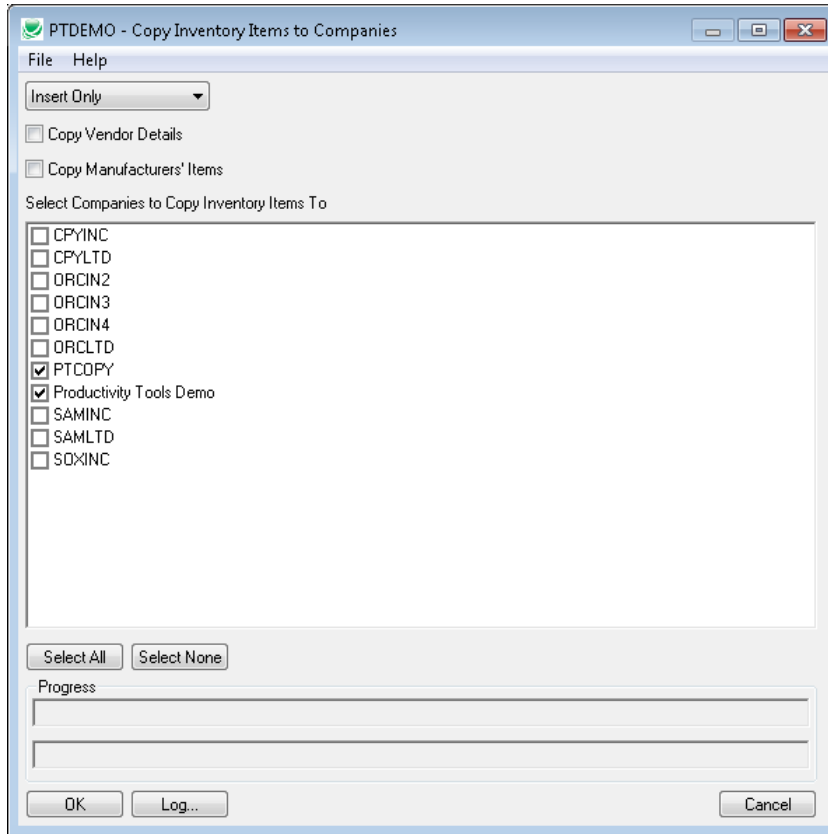
Include	Item Number	Description	Structure Code	Category	Account Set Code
Yes	A1-751/B	Stapler - Kings-5000 Series	STD	A1	AVG
Yes	A1-752/B	Letter Tray - Kings-5000 Series	STD	A1	AVG
Yes	A1-753/B	Paper Clip Dispenser - Kings-5000 Series	STD	A1	AVG
Yes	A1-754/B	Tape Dispenser - Kings-5000 Series	STD	A1	AVG

At the bottom of the window, there are buttons for 'Select All', 'Select None', 'Copy...', 'Log...', and 'Cancel'. The text '4 Items selected.' is displayed next to the 'Select None' button.

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Segment Substitution (continued)

Clicking on the Copy button will cause a pop-up window to appear and multiple companies can be selected. **Note:** when substituting segments, 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. Exceptions will be logged.



The log shows the substitution that has been made:

