

TaiRox Productivity Tools User Guide

Extended Locations - Summary

Extended Locations provides a mechanism for maintaining I/C Locations across multiple Sage 300 companies. Access is through a Copy Locations button that has been added to the core I/C setup form. Locations and companies can be filtered and cherry-picked. An option controls whether or not location status is to be copied. A full log of changed locations is maintained.

Access to Google Maps and email clients is provided on the extended form.

Extended Locations - Overview

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

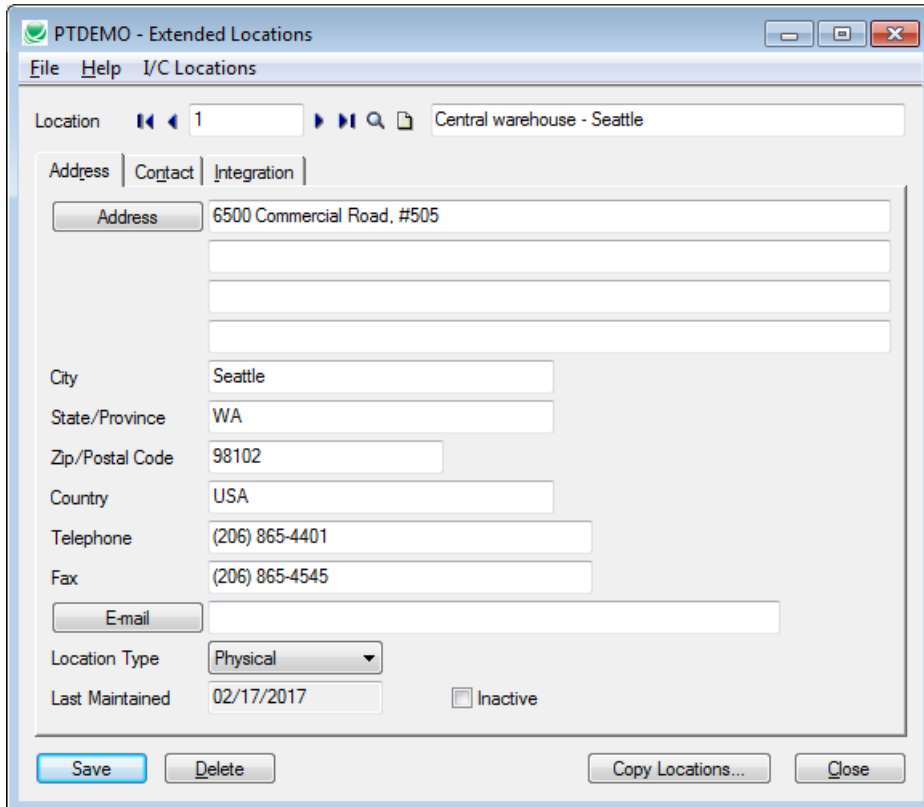
Pressing the Copy button on the pop-up window pop-ups up a list of ("target") companies to which those locations can be copied. The companies can be selected or de-selected on an individual basis. The operation to be performed (Insert Only, Update Only, Insert and Update) should be selected. Pressing the OK button will start the copy operation, first asking for an 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 location, there is no update performed - so the audit stamp is preserved.

TaiRox Productivity Tools User Guide

Extended Locations

When launched, Extended Locations displays the core Sage 300 entry window with several additional buttons. The Address and Email buttons can be used to link to Google Maps or an email client. The "Copy Locations" button can be used to copy location information to multiple companies.



The screenshot shows a software window titled "PTDEMO - Extended Locations". The window has a menu bar with "File" and "Help" options, and a sub-menu "I/C Locations". Below the menu bar is a "Location" field with a list icon, a page indicator "1", and a search icon, containing the text "Central warehouse - Seattle".

The main form area is divided into three tabs: "Address", "Contact", and "Integration". The "Address" tab is active and contains the following fields:

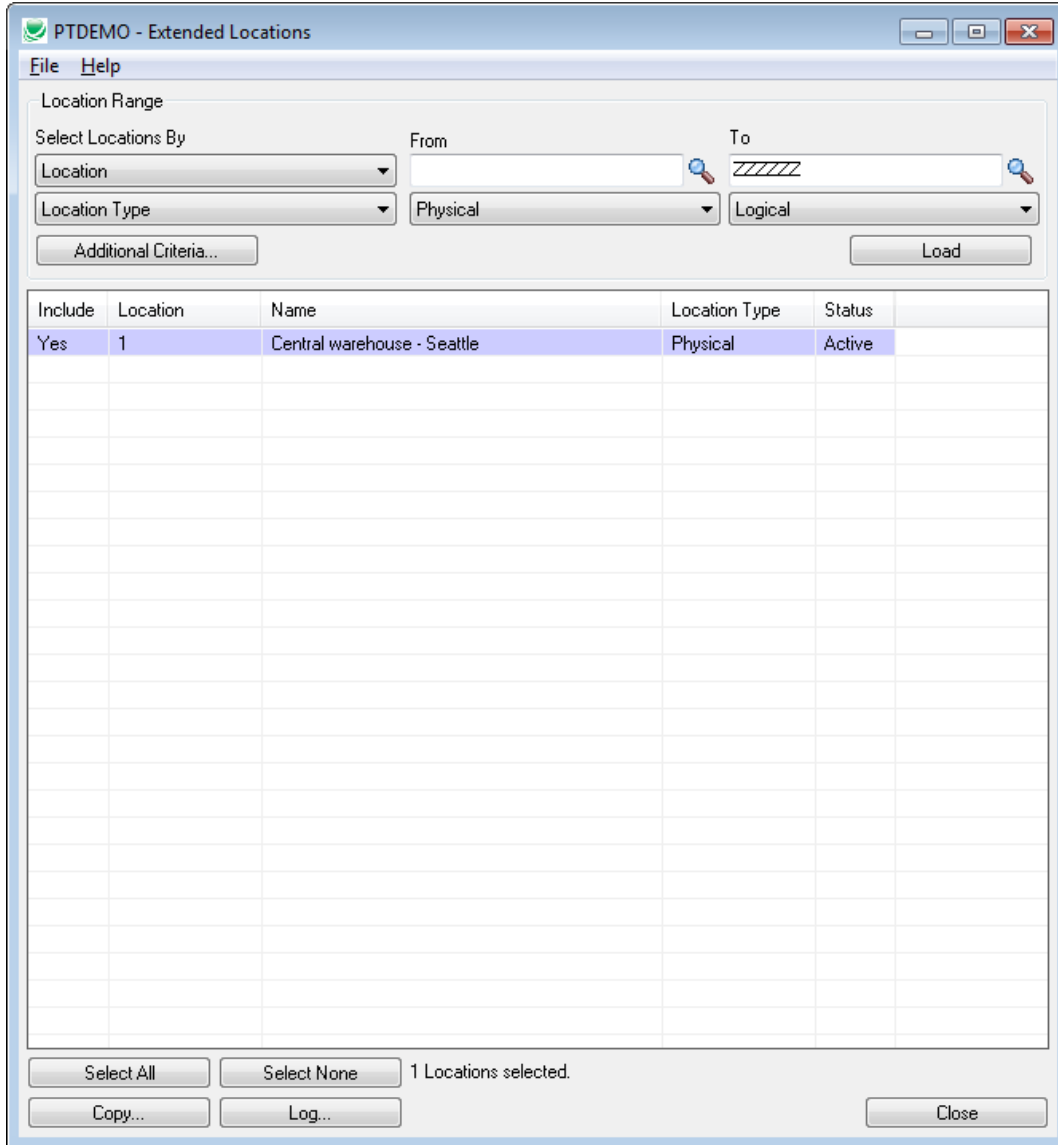
- Address:** A text field containing "6500 Commercial Road, #505".
- City:** A text field containing "Seattle".
- State/Province:** A text field containing "WA".
- Zip/Postal Code:** A text field containing "98102".
- Country:** A text field containing "USA".
- Telephone:** A text field containing "(206) 865-4401".
- Fax:** A text field containing "(206) 865-4545".
- Email:** A text field with a button labeled "E-mail" to its left.
- Location Type:** A dropdown menu currently set to "Physical".
- Last Maintained:** A date field containing "02/17/2017" and an unchecked checkbox labeled "Inactive".

At the bottom of the window, there are four buttons: "Save", "Delete", "Copy Locations...", and "Close".

TaiRox Productivity Tools User Guide

Extended Locations - Copy Locations

When the Copy Locations button is pressed, the following pop-up is displayed. Note that locations that have been just added or modified will be displayed in the grid - in our illustration, the Central warehouse - Seattle whose address we've changed is displayed.

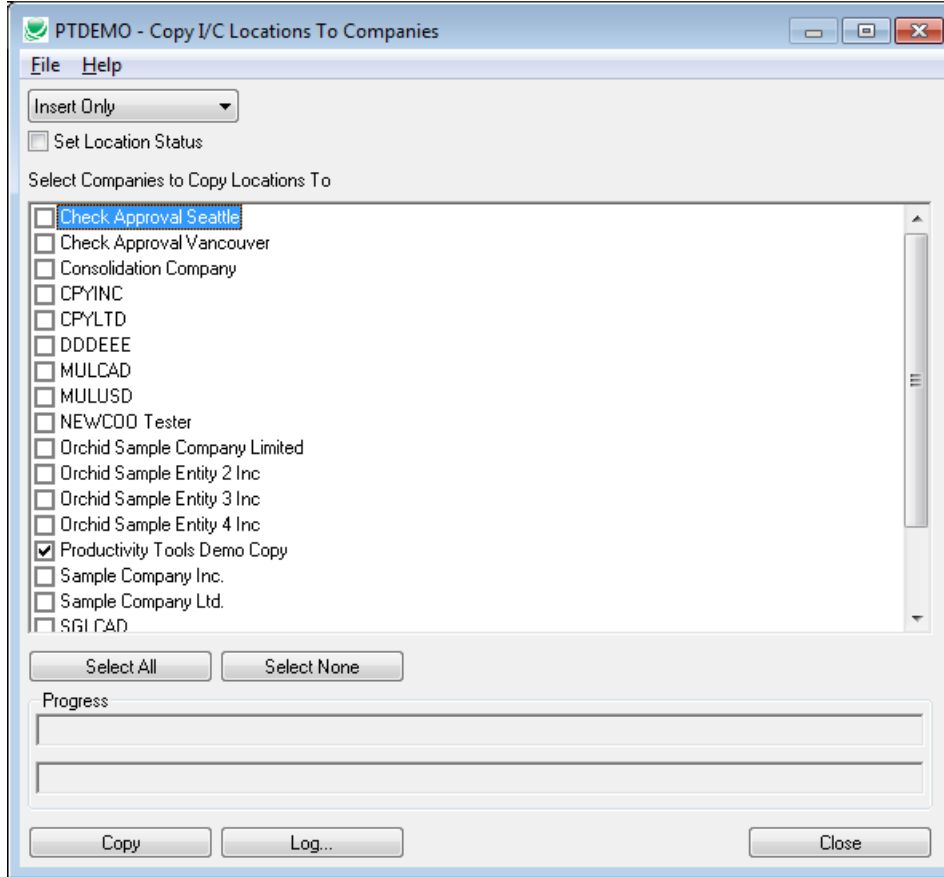


Rather than copying the changed location, any set of locations can be changed by selecting a range of locations or types and clicking on Load. Pressing the Copy button will continue to the next step - selecting companies.

TaiRox Productivity Tools User Guide

Extended Locations - Copy Locations

This is the window from which companies can be selected. An option to set location status is included - locations may be active in some companies and not others and in either case an address change should be copied.



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



Operation to be Performed:

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

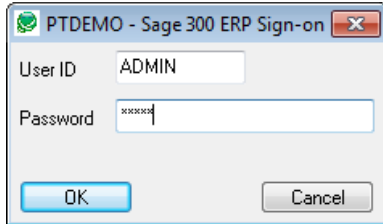
A checkbox can be used so that updating descriptions can be done quickly and safely.

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

TaiRox Productivity Tools User Guide

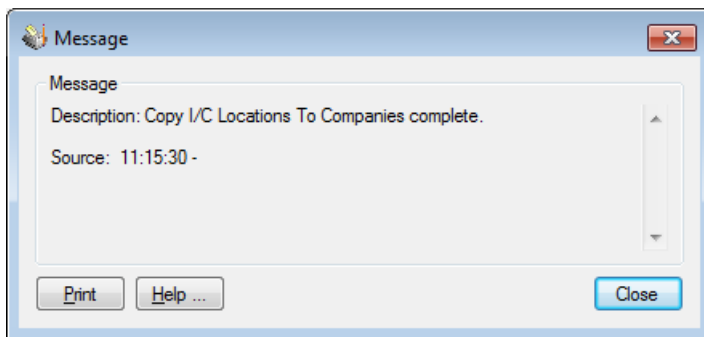
Extended Locations - Copy Locations

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 is displayed. The operation can be cancelled - if so operations will be partially complete and an assessment of the situation should take place before further work is done. A log of operations performed (or not performed) is available from the Log button.

Completion of the operation without errors or warnings will be signaled by this window:



A log file records the operations that were performed or not performed:

