# Extended Order Entry

Extended Order Entry is an enhanced replacement for the Sage Order Entry screen. It provides you with more functionality while entering an order, and fast access to order, customer, and item information.

The following screens show some of the extra features provided by the Extended Order Entry screen:

#### Sage Order Entry screen





TaiRox Extended Order Entry screen

### Click the following links for details on each Extended Order Entry feature:

<u>SmartFinder – Orders</u> Find orders quickly for a customer.

<u>SmartFinder – Customers</u> Find a customer quickly from a name, description, phone number or address.

<u>Item Finder (SmartFinder – Items)</u> Find an item quickly from partial words. Show additional item columns such as price, quantity and comments. Search also by manufacturer's item number with the Enterprise version of Productivity Tools.

SmartFinders provide fast, browser-like search capabilities for looking up data on the Order Entry screen. They search more fields than the Finder and search in all text fields at once. For example, search for "Seattle" if you think that the customer or contact is in Seattle.

<u>Line Finder</u> Quickly find a detail line in a large order by item number, item description, item comments, picking sequence, location, manufacturer, or other item fields.

<u>Customer Inquiry</u> (button left of the Customer Name field) provides complete customer data, including receipts, refunds, order, invoices, IC contract pricing, ship-to addresses, etc. using the TaiRox Extended Customer Inquiry window instead of the Sage Customer Inquiry screen.

<u>Calculate Expected Ship Date and Deliver By Date</u> Use the Business Days and Non-Business Days optional field in the Productivity Tools Options program to calculate shipment and delivery dates. <u>Customer Optional Fields</u> Display any customer optional fields on the Extended Order Entry screen. <u>Require PO Number</u> Optionally require PO numbers on orders for all or selected customers. <u>Display and Edit Optional Fields in the Order Entry Detail Grid</u> Optional fields appear as grid columns. <u>Other Restrictions and Preferences set in TaiRox Productivity Tools Options</u> Select more data entry control options in the TaiRox Productivity Tools Options program:

- Warn if a PO is duplicated on an order or shipment.
- Show unit of measure totals on the Extended Order Entry screen.
- o Include the discount percent set on order lines and for the order as a whole.
- Prevent orders and one-time shipments from being posted if the Ship-To Location is blank.
- Prevent users from entering or changing ship-to addresses.
- Require a ship-to phone number on orders and shipments.
- o Default the quantity committed on orders to the quantity ordered for select customers.

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Maximize

<u>Margin and Recent Cost Columns</u> Add 4 margin and markup columns to the item display grid. Click on a button to display margin and markup for the whole order.

<u>Edit Kit Details Using the Components Button</u> Configure kits in an order without cluttering up master kit definitions. Add items, delete items and modify quantities. Choose whether or not to re-calculate the unit price.

<u>Using the Enhanced BOM Components Popup</u> View component quantities on hand and quantities available at the current location, as well as component quantities on sales order and quantities committed at the current location and at all locations.

<u>Quick Forms Printing (O/E Forms)</u> Print a number of order-related forms, without posting an order or navigating to another window.

<u>Print Picking Slips Fast</u> Streamline the printing of picking slips, in situations where large numbers of these are to be printed as quickly as possible.

Quick PJC Entry Contract, Project and Category codes will default to the previous line's entries when inserting new lines.

<u>Prepayments</u> lets you view order prepayments entered in Order Entry or in Accounts Receivable. <u>Create Purchase Orders</u> in a flexible and robust way, previewed and with many options.

<u>Ship by Picking Sequence and Filter Items</u> Enter quantities picked for a large number of items by sorting items in picking sequence and restricting the item range – for example, by ship-via code. <u>Order from History</u> Add items to new orders for a customer based on previous orders.

Item Quantities Display quantities available at other locations or in other companies while entering an order.

<u>BOM or Kit - Use as Default</u> Use the default number when a BOM or Kit is added to an order. <u>Backorders</u> Display all items currently on backorder for the current customer.

<u>Update Order</u> Change Kit and BOM numbers, expected ship dates, item prices, addresses, and deliver-by dates. Commit and uncommit quantities, substitute one item for another, change salesperson code, zero quantities that are not in stock, and change item location.

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

# SmartFinder – Orders

Click the Order Number button to open the SmartFinder for searching orders. Order No.

- Enter part of a name or address (or order description or reference) and click the Find button.
- Double-click the order to select it and return you to the Order form.

### Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by order type and include completed and on-hold orders.
- Search returns records which contain the search string in any of the searched fields for example, one record may have "Royal" in the name, where another may have it in the address field. Both will be displayed.
  - **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".

#### Note:

- All of the word fragments must be present in one of the fields being searched. (For example, if you searched for "Ross Blvd", you will not see an order where "Ross" is in the Customer Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the Bill-To addresses) are treated as a single field.

### Display:

- The top grid displays the orders matching the search criteria. Double-click to select an order.
- The bottom grid displays the details of the order highlighted in the top grid.
- Click the Bill-To Address column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the locations of Ship-To addresses.
- Double-click email addresses (such as the Bill-To Contact E-mail) to create new emails.



# SmartFinder – Customers

Click the Customer Number button to open the SmartFinder for searching customers. Customer No.

- Enter part of a name or address (or contact phone or email address) and click the Find button.
- Double-click the customer to select it and return you to the Order form.

### Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter to retrieve active customers only and active ship-to locations only.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields for example, one record may have "Royal" in the name, where another may have it in the address field. Both records will be displayed.
  - **Using multiple words in the search?** Enter "300 Main" and the search will find entries "<u>300</u> <u>Main</u> Street" as well as "123 <u>Main</u> Street, Suite <u>300</u>".
  - **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(<u>451</u>) 555-<u>8991</u>" as well as "(408) <u>451-8991</u>".

#### Note:

- All of the word fragments must be present in one of the fields being searched. (For example, if you searched for "Ross Blvd", you will not see a customer where "Ross" is in the Customer Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the Bill-To addresses) are treated as a single field.

### Display:

- The top grid displays the customers matching the search criteria. Double-click to select a customer.
- The bottom grid displays the ship-to locations that match the search criteria.

Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen. Ship-to locations appear *only* if they contain the search string.

- Click the Address column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the locations of ship-to addresses.
- Double-click email addresses (such as the Bill-To Contact E-mail) to create new emails.



# Item Finder (SmartFinder – Items)

Click the Item Finder button under the item grid to open the SmartFinder for items.



The Item Finder provides several item search options and displays search results in a selection grid with columns such as price, description, quantity available (current and all locations) and comments. Often, Order Entry users select between similar items based on these columns.

SAMLTD - Extended Order Entry	-	×
<u>F</u> ile <u>H</u> elp		
Items Manufacture's Item Number		
Prod tens By		
Location 1 Central warehouse - Seattle		
Price List		
Active Items Only		
Item Number     Description       Price     Qty. Available       Qty. Available     Qty. Available		

- The Item Finder appears with the "Search" choice selected by default on the Items tab. This is the most common way to look up items.
  - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for items.
- Alternatively, select a different "Find Items By" choice. For example, you can choose "Show All Records" and specify a range of item numbers, structure codes, categories, or account sets using the range fields. You can specify more selection fields using Additional Criteria.

SAMLTD - Extended Order Entry						-		×
<u>F</u> ile <u>H</u> elp								
Items Manufacturer's Item Number								
Find Items By								
Show All Records ~								
tem Range								
Select Items By	From			То				
(None) ~								
(None) ~								
(None) ~								
(None) ~								
Additional Criteria						Reset	Defaults	
Location 1	Central warehou	ise - Seattle						
Price List								
Item Number Description	Price	Qty. Available	🛯 🛛 Qty. Available (All)	Status	Comment 1			^

#### Notes:

• The above search screen displays two tabs for looking up inventory items – Items and Manufacturer's Item Number – which let you search for I/C item numbers or for manufacturer's item numbers.

Search for manufacturer's item numbers is a Productivity Tools <u>Enterprise</u> feature.

The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

- If you do not select the SmartFinder "Search" option, you can select up to four item field ranges by item number, status, structure code, category code, and account set code.
- The item price is the quantity zero price for that customer.
- The Item Finder also displays all columns that are in the standard Sage Finder. You can choose which columns appear in the Item Finder by selecting File > Settings from the Item Finder menu.
- Selecting an item inserts a new row into the order entry grid.

### Searching for Inventory Control Item Numbers on the Items Tab

#### The Item Finder on the Items tab provides 7 search options:

🥏 SAMLTD - Extended Order Entry		-	×
<u>F</u> ile <u>H</u> elp			
Items Manufacturer's Item Number			
Find Items By Search			
Show All Records Littem Number Description	Central warehouse - Seattle		
F Structure Code Category Account Set Code			
Search			

• Search (most common option) – to search for words or word fragments in item text fields (such as the item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the Order Number and Customer Number SmartFinders.

The "Search" choice automatically searches in all fields that appear as columns in the grid.

- Show All Records to select items from all item records based on ranges of Item Number, Structure Code, Category, and Account Set Code and on item Status. You can also specify additional selection criteria using more item fields.
- Item Number to select items using part of the item number. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

💌 SAMLTD - Extended Order Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
I tem Number V Starts with V		
Starts with		
Item Range Contains		

Search by Item Number, Description, Structure Code, Category and Account Set Code also let you specify a search value that the item starts with or contains.

- **Description** to select items with descriptions that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- Structure Code to select items with structure codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Category** to select items in categories that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

• Account Set Code – to select items with codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

### More on the "Search" option (most common option):

- Select "Find Items by Search". (Note that Find Items By defaults to the last choice used.)
- Enter one or more words or word fragments in the next field to search multiple item tables and fields. (Note that the program scans all columns <u>displayed</u> in the Item Finder grid.)
- You can filter for Active items only.
- Search returns items and customer item numbers that contain the search string in any of the searched fields for example, one record may have "Desk" in the Description field, where another may have it in the Comment 1 field. Both items will be displayed.

#### Note:

 If using the Search option, all of the word fragments must be present in one of the fields that are displayed on the screen. (For example, if you search 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.)

### Display:

- The top grid displays the items matching the search criteria. The screen below shows "Desk Lamp" in the description of one item, and "Desk Lamp" in the comments of the second one so both appeared.
- The bottom grid displays the customer item numbers for the item selected in the top grid.

Search	tems Manu Find Items B	facturer's Item Number						
Nice List			desk lamp					
Image: Second constraints     Price     Oxy, Availa     Status     Commert 1       A11320     Runnescent Desk Lang     59.99     161     616     Active     Comes with stand and in A11310/0       A1310/0     Halogen Desk Light     50.35     75     332     Active     Desk lang with adjustat		1	Central warehouse -	Seattle				
AH1000         Revenuent Deck Lung         99.99         161         616         Attwo         Comes with start of and At1310/0           At1310/0         Halogen Deck Light         50.35         75         392         Active         Deck lamp with adjustat	Active Item	is Only					_	
At 310/0     Halogen Dedk Light     50.35     75     382     Active     Desk lamp with adjustat					Qty. Availa	🗳 Qty. Availa	Status	Comment 1
								Comes with stand and mou
uzeoner den Numbers Customer's Item Description Customer Name Unit of Measure Comments Instructions DESK LIME CASE Mr. Ronald Black Case	iustomer Item Customer's It	tem Number Customer's Item De				Measure Commer	nts	Instructions

• Click the Qty. Available column to see the location details, with the quantities on hand, on purchase order and on sales order. You can drill down further on these quantities.

#### Selection:

- Double-click an item in the top grid to select and add the item to the order.
- Double-click a customer item number in the bottom grid to enter the item number and the customer item number into the order form.

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### Selecting columns to display – and scan – in the Item Finder

Choose **File > Settings** in the Item Finder window to change column settings.

SAMLTD - Extended Order Entry	SAMLTD - Extended Order Entry Settings	×
File     Help       Close     Settings       Reset Defaults       Price List     USA       Active items Only       item Num     Description       A1-103/0     Fuorescent Desk Lamp       A1-310/0     Halogen Desk Light	Utrformatted Item Number Atternate Item Set Number Date Last Maintained Stocking Unt of Measure Unit Weight Commodity Number Date Inactive Segment 1 Segment 4 Segment 5 Segment 5 Segment 5 Segment 8 Segment 8 Segment 8 Segment 9 Segment 10     Item Number C<- Exclude All ->     Item Number Description (Cry, Available (Cry, Cry, Cry, Cry, Cry, Cry, Cry, Cry,	Up Down
	The maximum number of columns is 50, selected is 15 OK	Cancel

- The current columns that are displayed appear in the right-hand column.
- Highlight columns that you want to add in the left-hand column and click the Include button.

#### Note:

- **Settings apply to the currently selected tab**. For example, if you want to change the columns on the Manufacturer's Item Number tab, choose the tab first, and then select File > Settings.
- Only the "Included Fields" are used for searching. For example, if you do not include the Comments 1 field, the program will not scan the comments. Also note that fields like the "Price" will affect performance because the program calculates the price for the current customer in order to display it in the item results. If search is slow, remove columns that you don't need.

All of the possible columns are shown below. Note that optional and calculated fields are also available for inclusion – for example, the Item's Color and Qty. Available for Sale.

Defaults:				
SAMLTD - Extended Orde	er Entry Settings		×	
Unformatted Item Number Attemate Item Set Number Date Last Maintained Account Set Code Stocking Unit of Measure Unit Weight Commodity Number Date Inactive Segment 1 Segment 1 Segment 3 Segment 4 Segment 5 Segment 6 Segment 7 Segment 9	<ul> <li>All -&gt;</li> <li>Exclude</li> <li>All -&gt;</li> <li>Common Cate</li> <li>Statu</li> <li>Common Cate</li> <li>Store</li> <li>Statu</li> <li>Common Cate</li> <li>Store</li> <li>Statu</li>     &lt;</ul>	Available Available (All) is ment 1 ture Code gory k Item ult Picking Sequence ult Picke List Code	Up Down	
Segment 10 Y				
The maximum number of column	s is 50, selected is 15	OK	Cancel	
Additional Inclusion C	ational			
Additional Inclusion C	ptions:			
Comment 2 Comment 3 Comment 4 Allow Item in Web Store Kitting Item Default Kit Number Weight Unit of Measure Unformatted Alternate Item N Alternate Item Number Alternate Item Number Process Command Weight Conversion Factor Is Item a BOM Component Serial Number Mask Next Serial Number Use Serials Days to Expire	Serials Days to Expire Allow Different Serial Qty Serials Optional Fields Default Serial Warranty Cod- Default Serial Warranty Cod- Serial is on Cont. When Rec Serial is on Warr. When Rec Lot Number Mask Next Lot Number Use Lots Days to Expire Lots Days to Expire Lots Days to Expire Lots Days to Expire Lots Days on Quarantin Lots Days on Quarantin Lots Dotional Fields Default Lot Warranty Code Default Lot Contract Code	Lot is on Cont. When Recei Lot is on Warr. When Sold Serial Numbers in Use Serial Mask. Structure Serial Mask Description Unformatted Serial Number Auto-gen Serial Number Number of Serials to Genere First Generated Serial Last Generated Serial Last Generated Serial Lot Numbers in Use Lot Mask Structure Lot Mask Description Unformatted Lot Number Auto-gen Lot Number	Price Item Procurement Item Size	New Item Price Price Item Procurement Item Size Item Volume Waranty Period Qty. On Hand Qty. On Iden Qty. On Sales Order Qty. On Sales Order Qty. On Sales Order Qty. On Sales Order Qty. Committed Qty. Committed Qty. Committed (All) Qty. Available for Sale Qty. Available Qty. Available for Sale Qty. Available Qty. Available for Sale Qty. Available Qty. Qty. Qty. Qty. Qty. Qty. Qty. Qty.

### Searching for Items on the Manufacturer's Item Numbers Tab

**Note:** The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

#### Search for manufacturer's item numbers is a Productivity Tools Enterprise feature.

SAMLTD - Extended Order Entry	-		×
<u>F</u> ile <u>H</u> elp			
Items Manufacturer's Item Number			
Find Items By			
Search 🗸			
Manufacturer's Item Number Manufacturer's Item Description			
Search			
La Manufacturer's Item Number   Manufacturer's Item Description   La Item Number   Description   Price	Qty. Avail	able [	Qty

- The Manufacturer's Item Number Finder appears with "Search" selected by default. This is the most common way to look up items by manufacturer's item numbers.
  - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for manufacturer's item numbers.
- Alternatively, select "Manufacturer's Item Number" or "Manufacturer's Item Description" for searching.

#### The Item Finder on the Manufacturer's Item Number tab provides 3 search options:

• **Search** (most common option) – to search for words or word fragments in manufacturer's item text fields (the manufacturer's item number or the manufacturer's item description).

This search works like the Order Number and Customer Number SmartFinders.

• Manufacturer's Item Number - to select items using part of the manufacturer's item number.

SAMLTD - Extended Order Entry	-	×
<u>Eile</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Manufacturer's Item Number V Starts with V		
Starts with		
Contains		

You can specify that the item number starts with or contains the string that you enter.

- **Manufacturer's Item Description** to select items using part of the manufacturer's item description. As with the item number, you can specify that the item description starts with or contains the string that you enter.
- Note that the "Search" choice automatically looks in all fields that appear as columns in the grid such as the manufacturer's item number and the manufacturer's item description fields.

# Using the Line Finder

The Extended Order Entry Line Finder window lets you quickly find any order detail line in a large order by item number, item description, item comments, picking sequence, location, manufacturer, or other item fields.

Click the Line Finder button to display the Line Finder pop up window.

• Choose the order in which to display order items in the Line Finder.

You can list items by item number, location, or customer item number. The example below displays lines by item number.

• Choose the selection criteria for displaying order items in the Line Finder.

For example, you can select items by item number, item description, item comments, picking sequence, or location. The example below selects item lines for a range of item numbers and the location.

- Click the Load button to display the selected lines.
- Double-click the line you want to view, or highlight the line and click the Select button at the bottom of the screen.

👿 SAMLTD - O	order Details						-	
<u>F</u> ile <u>H</u> elp								
Order By								
Select Order By								
(None)		~						
(None)		~						
(None)		~						
Select Items By			From		Го		_	
Item		~	A1-400/0		A1-450/0		Q	
Location		~	4	Q 4	4		Q	
(None)		~						
ltem		~	Contains	~				Load
Line Number 0	Completed	Item Number	Description	Price List	Kit/BOM	Location	Exp. Ship Date	Qty. Or
3 N		A1-400/0	Desk Note Book	USA	NL/ DOM	4	2019-01-15	3.0000 E
	No	A1-450/0	Bulletin Board	USA		4	2019-01-15	2.0000 E
<								>
		Qty.	On Hand Qty. On Sale			Qty. Com		Qty. Available
Location 4 (Ea.) All Locations (Ea			26 549	3 📮 3 🚰	200 🖆 850 🍯		0 🕒 0 🎦	26 549
Air Locations (Ea	1.)		045	3	000		U	549
Selec	ct						Clo	ose

# **Customer Inquiry**

The Customer Inquiry button displays the TaiRox Productivity Tools Customer Inquiry screen – a convenient way to view all data related to the customer. Each tab focuses on an aspect of the customer's data.

You can also look up details for other customers while you are on this screen.

Order No.	••• NEW ••••	► ► Q +	No. of Shipments 0 Last Shipment No.
Customer No. 1200	)	🔍 🕂 👼 🗏 🔯 🛛 Mr. Ro	anald Black Last Invoice No.
ile <u>H</u> elp A/R Customer No., I∢ ∢		er Inquiry	Amounts In Customer Currency VISD
		atus   Comments   Optional Fids.   Ship-T	
Short Name	BLACK		Start Date 01/01/2009
Group Code	RTL	Retail Sales Group	Last Maintained 03/01/2013
Account Set	USA	Accounts Receivable, Other	Inactive / /
Rate Type	SP		On Hold
Territory	CA	Account Type Balance Forward	Allow Web Store Shopping
Price List	USA	Customer Type Base	✓ Allow Partial Shipments
FOB Point			✓ Allow Backorder Quantities
Inventory Location	1	Central warehouse - Seattle	✓ Print Statements
Ship Via			
Payment Code	CHECK	Check	
Check Language	ENG	Check for Duplicate POs None	
Delivery Method	Mail		
Billing Cycle	BILLWK	Weekly Billing Cycle	
Interest Profile	INTRTL	Interest Profile - Retail	
Terms Code	DUETBL	Due by Invoice Date	
Retainage Terms			
Retainage %	0.00000		
Retention Period	0	Days	
Refresh			Qlose

# Calculating Expected Ship Date and Deliver By Date for Orders

The Extended Order Entry program will automatically calculate the expected ship date and deliver by date on the order header and order details of each order, based on your company's regular business days and any additional non-business days in your calendar – such as statutory holidays and closures for inventory counts.

You set your company's business days, and a table of additional non-business days, in the Productivity Tools Options program.

Home							
M. TaiRox Braductivity Tools	TaiDay Dra						
Accounts Payable Tools Accounts Receivable Tools Administrative Services Tools General Ledger Tools Inventory Control Tools	Licensed to: Dealer: T	ductivity Too on Thomson, TAIROX S aiRox Software, Inc Don	ols (General Li Software inc	edger Tools	;)		
Multi-Company Tools Order Entry Tools	General Ledger Tools	Order Entry Tools	Purchase Order Tools	Inventory Control Tools	Accounts Receivable Tools	Accounts Payable Tools	
US Payroll     Visual Process Flows     A/P Transactions     V     Soge For Help, press F1	Payroll Tools	Multi-Company Tools	License Information	Options	Convert Contacts	Administrative Services Tools	

• Set your company's regular business days and additional non-business days on the Business Days tab in the Options program.

🗾 S/	AMLTD - Opt	ions					-		×
<u>F</u> ile	<u>H</u> elp								
Menu	Item Quantities	Business Days	Order Entry	Purchase Orders	General Ledger				
	iness Days Sunday Thursday	☑ Monday ☑ Friday	⊡ Tue	. –	Vednesday				
Non-Business Days Optional Field									]Q

The non-business days optional field is a table of upcoming dates when your business will be closed.

**Note:** if you update the dates in the non-business days optional field, you must restart the Extended Order Entry program for the new dates to be in effect.

• Set the number of days from the order date to the expected ship date and deliver by date on the Order Entry tab in the Options program.



# Customer Optional Fields Displayed on the Order Entry Screen

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/R customer record on the right side of the Extended Order Entry screen.

	ended Order Entry Drder Entry						
Order No. Customer No.		01 ► ► Q + No Q + To R Q Mr. Ronald Blac as Split Bates Totals	. of Shipments	Last Shipment No.     Last Invoice No.			
Template Code Order Date	ACTIVE	PO No.	Status	: Posted	Entered By: ADMIN	Optional Field Accounts Receivab Note	Value Finance Allow greater volume discount
Order Type Ship-To Location	Active	From Multiple Quotes	Job Related Port of Vancouver	Project Invoicing	Retainage	PROSPECT Lease Date Requires Purchase	No
Deliver By	01/15/2019	Exp. Ship Date 01/15/2019 (1)		🗹 Calc. Tax		integares Fulchase	168
Ship Via Description	CCT Q Please ship ASAP	Cross-Country Trucking Lines	Tracking No. Reference	Ref 0901-1		- 	•

This lets you view notes concerning the account during data entry, and also view order requirements – in this example, one of the fields is "Require Purchase Order No."

• You specify which optional fields to display on the Extended Order Entry screen in the Productivity Tools Options program – on the Order Entry tab.



# Require Purchase Order Number on Orders

Extended Order Entry includes an option to require users to include purchase order numbers on orders for all or for selected customers. You select this option in the Productivity Tools Options program.

SAMLTD - Exte	nded Order Entry Order Entry						- ¤ ×
Order No. Customer No.		् + 🗟 🗟	Q +         No. of Shipments         0           Mr. Ronald Black         0	Last Shipment No.			
Order Customer T Template Code	ACTIVE	ales Split Bates Totals PO No.	Status: Po	ted.	Entered By: ADMIN	Optional Field	Value
Order Date Order Type	01/15/2019 🛗	On Hold From Multiple Quotes	Job Related	Project Invoicing	Retainage		Finance Allow greater volume discount No

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🗙 Error	×
Error Description: Purchase Order Number cannot be blank. Source: 13:29:14 -	>
Print	

#### Notes:

- The program lets you require PO numbers for all customer orders, or only for customers with a "Yes" value for a specific optional field. For example, the Order Entry screen pictured above shows an optional field called "Requires Purchase Order No" where the value for the field determines if the PO number is required.
- If a customer record does not include a value for the Yes/No optional field, the program will *not* require a purchase order number when you create an order.

### Setting Up the Option to Require PO Numbers on Orders

In the following example, the program uses the Yes/No value in Optional Field "REQPONUM" (with a description "Requires PO Number on Orders and Shipments") to determine whether customers require a PO number.

• You choose the option and the optional field in the Productivity Tools Options program – available in the TaiRox Productivity Tools folder on the Sage 300 Desktop:

SAMLTD - Options	-		×					
<u>Eile H</u> elp								
Menu Item Quantities Business Days Order Entry Purchase Orders General Ledger								
☐ Order/Shipment Must Have a Purchase Order Number REQPONUM Q								
Leave the Customer Optional Field blank if a Purchase Order Number is required for all customers. Select a Yes/No Customer Optional Field name to control this option by customer.								

(The General Ledger tab appears only if you have a license for TaiRox Productivity Tools Enterprise Edition.)

 If you use the option to force PO numbers on orders – and the customer record includes the control field with a "Yes" value – the following message appears when you try to post an order that's missing the PO number.

Order No. Customer No	1200	► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ► ►	Ar. Ronald Black Last Shipments				
ler Customer	Taxes Optional Fields Sal	les Splįt <u>R</u> ates T <u>o</u> tals			* Requi	ed	
Femplate Code	ACTIVE Q	PO No.	Status:	E	intered By:	Optional Field	Value
Order Date	2021-04-12 mm	On Hold	S Error	×		Requires PO Number on Order	Yes
				~		Customer Credit Warning	No
Order Type	Active ~	From Multiple Quot	Error		Retainage	Preferred Customer	Yes
	<u> </u>	Location 1	Description: Purchase Order Number cannot be blank.			Note	Allow greater vol
Ship-To Location		Location				Discount Grace Period	20
Deliver By	2021-04-12 🛗	Exp. Ship Date 202	Source: 10:00:21 -			Due Date Grace Period	10
		Cross-Country Truckir				Lease Date Lease Expiry Date	
šhip Via	CCT						

• In this example, the "Requires PO Number . . ." field also appears at the top of the Optional Field list on the Order Entry scfreen.

Note that the field appears on the Order Entry screen if:

- It has been added to the Customer record in A/R.
- It was added to the set of optional fields that are displayed in Order Entry (using the Productivity Tools Options program).

# Display and Edit Optional Fields Inline in the Order Detail Grid

If you have the Enterprise version of TaiRox Productivity Tools, you can display and edit optional fields for order details *inline* in the Extended Order Entry detail grid.

Margin Percent	Markup Percent	Margin Amount	Most Recent Unit C	Discounted Unit	D Optional Fields	Q Backorder	Q, Item's Color	Dangerous Item	Extended Warra	Q, Freight Met	Q, Manufacture
83.72184	514.32000	0.13	0.026045		Yes	Yes		No	No	Air	
-321.31711	-76.26491	-0.55	0.716239		Yes	Yes		No	No	Air	
100.00000	0.00000	18.41	0.000000		Yes	Yes		No	No	Air	
100.00000	0.00000	174.83	0.000000		Yes	Yes		No	No	Air	
د	Sage 300 Optional Fields Entry						Productiv	ity Tools I	nline Optic	onal Fields	>

You choose the option to display optional fields inline in the Productivity Tools Options program – available in the TaiRox Productivity Tools folder on the Sage 300 Desktop.

### Adding Detail Optional Fields to the Order Entry Details Grid

- Select the Productivity Tools Options program. Note that you must be using TaiRox Productivity Tools' Enterprise Edition to add optional field columns to the grid.
- Choose the Order Entry tab and then select the extended transaction entry programs where you want to display optional fields. You can add optional fields to the detail grids in Extended Order Entry, Extended Shipment Entry, Extended Invoice Entry, and Extended Credit/Debit Note Entry.



# Set Up Other Restrictions and Preferences in TaiRox Options

Extended Order Entry also includes other settings that you can select on the TaiRox Productivity Tools Options screen:

- Warn if a PO is duplicated on an order or shipment.
- Show unit of measure totals on the Extended Order Entry and Extended Shipment Entry screens.
- Include the discount percent set for each order line and for the order as a whole.
- Prevent orders from being posted if the Ship-To Location is blank.
- Prevent users from entering or changing ship-to addresses.
- Require a ship-to phone number on orders and shipments.
- Default the quantity committed on orders to the quantity ordered for select customers.

### Setting Up Additional Order Entry Options in Productivity Tools Options

- Select the Productivity Tools Options program.
- Choose the Order Entry tab and then select the options you want such as displaying a warning for dulicate PO numbers.

SAMLTD - Options	– 🗆 ×								
<u>File</u> elp									
Menu Item Quantities Business Days Order Entry Purchase Orders General Ledger									
☑ Order/Shipment Must Have a Purchase Order Number REQPONUM Q									
Leave the Customer Optional Field blank if a Purchase Order Number is required for all customers. Select a Yes/No Customer Optional Field name to control this option by customer.									
Show Totals for This Unit of Measure ea									
✓ Display a warning if a Customer Purchase Order is used on more than one Order or Shipmer Subtract. Discount from Margin and Markup Calculations	ent 🔨								
Ship-To Location Cannot be Blank									
On Vot Allow Ship-To Address to be Changed     Order/Shipment Must Have a Ship-To Phone Number									
Display Order Entry Detail Optional Fields Inline     Display Shipment Detail Optional Fields Inline     Enterprise Op	otions 🔍								
Set Expected Shipment Date To 4 Business Days After Order Date									
Set Deliver By Date To 7 Business Days After Order Date									
Default Quantity Committed Based on a Customer Optional Field	COMMITQTY								

See the Productivity Tools Options User Guide for more information on each of these options.

# Margin and Recent Cost Columns

Knowing item and order margins is important when margins are constrained contractually or when the most recent cost may be used rather than a price list. Extended Order Entry saves you time by displaying margin and cost data on the Extended Order Entry screen.

Extended Order Entry's line detail grid includes 4 additional columns for margins and costs. These 4 columns are also displayed when using the Order from History function on the Orders tab in the detail line grid.

- Margin Percent
- Markup Percent
- Margin Amount
- Most Recent Unit Cost (based on P/O receipts).

You can also include line discounts in margin and markup calculations by selecting the option to "Subtract Discount from Margin and Markup Calculations" in the Productivity Tools Options program.

Note: Users must have Order Entry Item Cost Inquiry rights in order to see the margin columns.

#### To view Order Margin information for the whole order and for individual lines:

• Click the Order Margin button (below the item quantities) at any time to see the margin on the order as a whole.

Update	Sh	ip Ite	m Finder	Line Finder	Order N	largin	
Orig. Order 🖪 Sh	pped To Gt	y. Committed Completed	Manuf. kem No. Customer kem	. Q. Non-Stk. Ctr. Acct.	Margin Percent Markup Pe	rcent Margin Amount	Most Recent Unit Cost Discounted Unit Price
15	0	0 Yes			64.41587 181.0	2411 38.64	21.437064 59.99
¢					_	SAMLTD - Order Eile Help Margin Percent Markup Percent Margin Amount	Margin X 64.41587 181.02411 579.65
Location 1 (Ea.)	Gty. on Hand 137	Gty. on Sales Order 15 🗳	Qty. on Purchase Order 260 🕒	Qty. Committed	Gty. Available 137	1	Close
All Locations (Ea.)	657	34 🕒	436 🕒	0 😬	657		

Users with an Enterprise license for TaiRox Productivity Tools will also see a Discounted Unit Price, which is calculated by dividing the Discounted Ext. Amount by the Quantity Ordered.

I	Margin Percent	Markup Percent	Margin Amount	Most Recent Unit Cost	Discounted Unit Price
	64.41587	181.02411	38.64	21.437064	59.99

# Edit Kit Details Using the Components Button

Some businesses have kits where components or prices change with almost every order, and it is impractical to have each variation be a different kit number.

Edit Kit Details provides a way to edit kit details – right inside an order – without creating new kit numbers.

- You can add or delete kit components and change the component item quantities.
- You can edit detail line optional fields.
- And you can change component unit prices, calculate a new kit price, and enter the new kit price into the order detail line.

#### To change kit component details and pricing:

• Click the Components button on the Extended Order Entry screen.

SAMLTD - Ext ile <u>H</u> elp O/E	tended Order Entry Order Entry					×
Order No.		► N Q +	No. of Shipments 0 Last Ship	pment No.		
Customer No	o. 1200	् + 🏹 😺 💽 🛛 Mr. R	onald Black Last Invi	oice No.		
Order Customer	Tages Optional Relds Sale	es Spilt Bates Tgtals			* Required	
Template Code	ACTIVE Q	PO No.	Status:	Entered E	V: Optional	Field Value
Order Date	12/02/2020	On Hold			Accounts	Receivab Finance Allow greater volume discount
Order Type	Active -	🖂 From Multiple Quotes 🛛 😈	Job Related	Project Invoicing		Purchase Yes
Ship-To Location	् + 5	Location 1	Q Central wavehouse - Seattle			
Deliver By	12/02/2020	Exp. Ship Date 12/02/2020		Calc. Tax		
Ship Via	CCT Q	Cross-Country Trucking Lines	Tracking No.			
Description			Reference			
*	18					
	Qty. on Hand			Committed	Gty. Available	
Location 1	0	0 😐	0 4	0 🕒	0	
Al Locations	0	0 😁	0 🤗	0 😬	0	
ben/Tgx	Components Ship	Al Update Ship	. Order Margin	Line Finder Order Su	btotal	0.00 USD
Pog	Create PO Delete	History Prepayment		Create Purch	ase Order Order from He	tory O/E Forms Qose
Pog (	Name Location		Number Description Stocking Un		ore Order Order from His . On Purcha Qty. On Sales O	
	, <u>, , , , , , , , , , , , , , , , , , </u>		Number Description Stocking Un		) (	

• **Click Yes** when the confirmation message appears to add or delete kit components or change component quantities, pricing, or optional fields.

**Click No** to change weights, lots or serial numbers. The program will display the Sage 300 Components form.

Extended	l Order Entry	×
?	Do you want to change the components and component pricing for the kit? Choose Yes to change items, quantities, and prices. Choose No to change weights, lots and serial numbers.	
	Yes <u>N</u> o Cancel	

Important Note #1: The Components button provides access to two different forms.

- Click the Yes button to display the TaiRox components form to change quantities and pricing and to add or delete component items.
- Click the No button to display the Sage 300 components form to change weights, lots, or serial numbers.

If the kit item has been shipped, the Sage 300 form will be displayed.

• Use the Kit Unit Price field at the top of the form to change the unit price of the kit.

The Kit Unit Price will be automatically updated if you:

- o Add or delete kit components.
- Change the kitting quantity for any component.
- Change the component unit price or the extended component price.
- Edit optional fields information for the kit in the top grid.
- In the bottom grid, you can:
  - Change the number of component items in the kit the Kitting Quantity.
  - o Change the unit price of each kit component the Component Unit Price.
  - Override the calculated total price for this component (override the kitting quantity x component unit price) the Extended Component Price.

Changes made in the bottom grid will update the Kit Unit Price at the top of the form.

💈 SAMLTD - Kitti	ng Components					- 1	⊐ ×
le <u>H</u> elp							
em Number	OFFICE SPL KIT	Offi	ce Supplies K	ût Deluxe			
ütting Number	2	Orde	er UOM	Ea.	Qty. Ordered		2.000
it Unit Price	64.7500	00 🐻 Pric	ng UOM	Ea.			
Q Optional Field	Optional Field Description	n Value Set	Q. Value	e Value I	Description		
BACKORDER	Backorder	Yes	Yes	Yes			
COLOR	Item's Color	Yes					
DANGEROUS	Dangerous Item	Yes	No				
EXTWARRANTY	Extended Warranty Avail	able Yes	No				
RGHTMETHOD	Freight Method	Yes	Air	Air			
MANFACTURER	Manufacturer	Yes					
PACKER	Packer	Yes					
Lin Q. Compo	nent Description	Kitting	Quantity	Qty. Ordered	Component Unit Price	Extended Com	nonent Price
A1-650/0	Highlighter		1	2	0.64	Exciliaca com	0.6
A1-655/0	Pen		1	2	1.20		1.2
A1-656/0	Pencil		1	2	0.16		0.1
A1-751/B	Stapler - Kings-500	00 S	1	2	35.43		35.4
5 A1-752/B	Letter Tray - Kings		1	2	12.95		12.9
6 A1-777/B	Memo Holder - Kin		1	2	14.37		14.3
.ocation 4 (Ea.)	Qty. On Hand 500	Qty. On Sales Ord	er Qty. On 0 🗳	Purchase Order 500 [2		Qty.	Available 500

Note that the price columns in the grid above have been moved from the end of the grid to a position beside the Qty. Ordered field.

• The Kit Unit Price for the kit is automatically recalculated as you change components, and the resulting calculation may represent a new unit price for the kit as a whole.

If necessary, you can change the Kit Unit Price after editing item components.

• Click Save, and then click the close button to update the component quantities and update the unit price for the kit.

#### If you DO NOT click the Save button first, one of the following messages can appear:

SAMLTD	- Kitting Components	$\times$
?	Do you want to save changes to the components that make up this kit?	
	Yes No Cancel	

This message appears if you changed kitting component items or component item quantities – even if you also change prices.

o Click Yes to update the order with the new component changes.

SAMLTD	- Kitting Components	×
?	The new Kit Unit Price is not equal to the unit price of kit #OFFICE SPL KIT on the order detail line. Do you want to update the unit price of the kit to the new Kit Unit Price?	
	Yes No Cancel	

This message appears if you changed pricing only, and the Kit Unit Price displayed at the top of the screen does not match the kit price on the order detail line.

o Click Yes to update the order with the new kit unit price changes.



S Error	×
Error Description: Incorrect procedure. Existing kit detail lines on existing orders must be deleted, and re-inserted if you want to modify the kit components. Source: 13:45:50 -	>
Bint	ose

### Important Note #3: Pricing data on the Kitting Components form is NOT saved.

The Kit Unit Price, Component Unit Prices, and Extended Component Prices are not saved when you close the Kitting Components form. They are used ONLY during the session to help you calculate a new Kit Unit Price and update the order detail line.

Each time you open the Kitting Components form, the program will read and display the unit prices from the I/C Item Records and calculate a Kit Unit Price at the top of the form based on the calculated Extended Component Prices.

*If you previously changed the Kit Unit price, and you reopened Kitting Components form, you will see the following message – even if you made NO price changes.* 



Do NOT click the Yes button unless you want to revert to reset the Kit Unit Price.

# Using the Enhanced BOM Components Popup

Click the Components button at the bottom of the screen to see the list of components in a bill of material and to check component availability if you need to build more BOM items.

The BOM Components screen displays all components in a BOM and displays the quantities of each components ordered and shipped for this order, as well as the quantities on hand and available for each component at the current location in case you need to build more BOMs.

It also displays (at the bottom of the screen) item quantities on hand, on sales order, on purchase order, committed, and available for the current location and all locations for the item you select in the grid.

#### To view BOM Components and Quantities:

• Highlight the order line for the BOM and click the Components button to see BOM components and component quantities.

SAMLTD - BOM Component	5							
ile <u>H</u> elp								
Component Item Number	Description	Unit of Measure	Qty. Ordered	Qty. Shipped	Qty. On Hand		Component's BC 📥	
3(HUNTS-2500)T	Kings 5000 Series Desk		1	0		0	3	
1-310/0	Halogen Desk Light	Ea.	1	0	128	128	-	
1-655/0	Pen	Ea.	1	0	998	998	-	
A1-656/0	Pencil	Ea.	1	0	498	498		
(1-751/B	Stapler - Kings-5000 Ser		1	0	98	98		
A1-752/B	Letter Tray - Kings-5000		1	-	-2	-2		
A1-753/B	Paper Clip Dispenser - K		1	0	59	59		
A1-754/B	Tape Dispenser - Kings		1	0	50	50		
A1-760/0	Paper Clips	Box	10	0	30	30		
А1-777/В	Memo Holder - Kings-50		1	0	17	17		
A1-779/B	Calendar Holder - Kings		1		-1			
A1-780/B	Glass Desk Shelf - King	Ea.	1	0	39	39		
							-	
(		m					4	
0	. On Hand Qty. On Sales Order	Ohi On Burchard		ty. Committed	0 0	vailable		
Location		Gity. On Purchase (	Jraer G 0 📮	ty. Committed		Vallable 0		
Location		P	0 9	0		0		

- The Qty Ordered column shows the number of component items are included in this order.
- The Qty On Hand shows the number of component items in inventory (not including items that have already been assembled in BOMs).
- Items in yellow have insufficient quantities on hand to build new assemblies if you need them.
- In this case, the top item in the BOM Components list above is a subassembly BOM. Click the Details button or double-click the line in the grid to display the subassembly components.
- You can also see that the top line has zero quantities on hand again, this is not including subassemblies that have already been assembled in BOMs.

The quantities for all locations are displayed at the bottom of the screen – in this case, also for the subassembly in the top line. You can select other lines in the grid to view quantities at all locations.

# Quick Forms Printing (O/E Forms Button)

The O/E Forms button lets you quickly print a number of order and shipment-related forms without posting an order or navigating to another window. See the next section – <u>Print Picking Slips Fast</u> – for an even faster way to print picking slips directly.

Customer No	1200	् + 👼	R 🖸 🛛	/r. Ronald Black		Last Invoice No							
d <u>e</u> r C <u>u</u> stomer	Taxes Optional Fields Sale	s Splįt <u>R</u> ates	Totals										
Template Code	ACTIVE Q	PO No.	2023-000048	31	Status:	Posted		Entered By: ADMIN	Optional Field		Value	Description	
Order Date	2023-07-14	On Hold							Customer Credit Warning		No		
order Date									Require PO Number on Orders	and Shipments		Yes	
Order Type	Active ~	From Multipl	e Quotes	<b>.</b> .	Job Related	Project	Invoicing	Retainage	Preferred Shipping Method		FEDEX for Expedited or un		
Ship-To Location	WAREHS Q +	Location	1		entral warehouse -	Seattle			UPS Zone		WHI	White Zone	
ship-10 Location			<u> </u>			Seduc			User Note		Allow greater volume disco		
Deliver By	2023-07-14	Exp. Ship Date	2023-07-14	<b>#</b>		Calc. T	ах		Note		Allow greater volume disco	punk	
Ship Via	CCT Q	Cross-Country	Trucking Lines		Tracking No.								
Description	August 2023 Order -				Reference								
Lin Type	Q. Item No./ Misc	c. Charge	Q Kit/BOM	Description	Q. Price List	Q. Location	Deliver By	Exp. Ship Date	Qty. Ordered Q. Order UOM	Q. Order	Weight UOM Price	By Pricing	UOM ·
1 Item	#OFFICE KIT		1	Office Furniture	USA	1	2023-04-05	2023-04-05	0 Ea.	bs.	Quant	tity Ea.	
2 Item	A2(IMAGE-1500)G			Image 1500 Seri	USA	1	2023-04-05	2023-04-05	0 Ea.	lbs.	Quant	bity Ea.	
3 Item	A1-800/0			Wastebasket	USA	1	2023-04-05	2023-04-05	1 Ea.	lbs.	Quant		
4 Item	A1-450/0			Bulletin Board	USA	1	2023-04-05	2023-04-05	0 Ea.	lbs.	Quant		
5 Item	C1-250/R			Krugg 250 Arm		1	2023-04-05	2023-04-05	1 Ea.	lbs.	Quant		
6 Item	C2-230/G			2300 Series Pos		1	2023-04-05	2023-04-05	0 Ea.	lbs.	Quant		
7 Item	D1-608/B #OFFICE SPL KIT		2	Double Pedestal		1	2023-04-05	2023-04-05 2023-04-05	0 Ea.	lbs.	Quant		
8 Item	#UFFICE SPL KIT		2	Office Supplies	USA	1	2023-04-05	2023-04-05	1 Ea.	lbs.	Quant	ity Ea.	,
	Qty, on Hand	Qty, on Sale	es Order	Qty, on Purch	ase Order	Qty, Commit	ted	Gty, Available					
Location 1	0		0 🧧		0 🧧		0 🧧	0					
All Locations	0		0 🕒		0 🕒		0 🔛	0					
Item/Tax	Components Ship /		Ship Date		Californities	Update	Ship	Item Finder	Line Finder Order Marc		rder Subtotal	273.66 L	JSD
item/1 <u>a</u> x	Components Ship /	ne Se	ong Date		Set Location	Update	Ship	Finder	Une rinder Order Marg	n 01		270.00	
Pogt G	reate PO Delete	History	Prepayment.					Backorders	Prepayments Create Purc	ase Order	Order from History	O/E Forms	Close

### To print OE forms

• Click the O/E Forms button.

The following form appears. Click the buttons on the right to use the Sage 300 printing functions and the Productivity Tools Email Packing Slip function.

SAMLTD - O/E Fo	orms		×
<u>F</u> ile <u>H</u> elp			
Order Number	ORD00000000095	Q [	Print Order Confirmation
Order Number		Q [	Print Quote
Shipment Number	SH0000000000000000085	Q [	Print Picking Slip
Invoice Number	IN00000000097	Q [	Print Invoice
Shipment Number	SH0000000000000000085	Q [	Email Packing Slip
		[	Close

For quotes, the form will be pre-populated as follows:

💆 SAMLTD - O/E Fo	irms		×
<u>F</u> ile <u>H</u> elp			
Order Number		Q	Print Order Confirmation
Order Number	QT00000000025	Q	Print Quote
Shipment Number		Q	Print Picking Slip
Invoice Number		Q	Print Invoice
Shipment Number		Q	Email Packing Slip
			Close

• You must select a shipment number for the Print Picking Slip and Email Packing Slip functions. By default, the Last Shipment Number (displayed at the top of the Extended Order Entry screen) will be used unless you change it.



### Selecting the Email Packing Slip choice

Productivity Tools lets you email customers packing slips for each shipment. When you click the Email Packing Slip button, the following form appears:

🛃 SAMLTD - Email Packing Slips 🛛 🚽 🥆 🗙					
<u>F</u> ile <u>H</u> elp					
Use Slip	OEPACKSHIPMENT1.RPT Browse				
Sort By	Line Number V				
From Shipment Number	SH000000000000000085				
To Shipment Number	SH000000000000000085				
Message ID	PACKING 🔍 🐻				
Print Serial/Lot Numbers					
Print Kit Component Items					
Print Bills Of Material Component Items					
Email To	Email Address Entered V				
Email	ronaldblack99@hotmail.com; receiving@rblack.com				
Progress					
Send	Glose				

- Select the Crystal report form for packing slips.
- Confirm the shipment number. By default, this is the Last Shipment Number for the order (displayed at the top of the screen).
- Select the Message for the Packing Slip. You can edit messages using the O/E E-mail Messages program, or click the Zoom button beside the Message ID field to load the form.
- Select what you want to appear on the packing slip: serial/lot numbers, kit component items, or BOM component items.
- Specify an email recipient or select the customer or ship-to email addresses for sending packing slips. The customer and ship-to email addresses come from the A/R customer account.

If you choose "Email Address Entered", enter the recipient's email address.

You can separate multiple email addresses with a semi-colon, comma, or blank space.

For more information on emailing packing slips, see the Email Packing Slips User Guide.

# **Print Picking Slips Fast**

Extended Order Entry lets you streamline the printing of picking slips when you need to print large numbers of them as quickly as possible.

Use the Settings choice on the Extended Order Entry File menu to select picking slip default settings, so you don't need to answer the setup questions in a pop-up dialog box:

🛃 PTDEMO - Extended Order Entry	PTDEMO - Extended Order	Entry Settings	×
<u>File H</u> elp O/E Order Entry	Post Order and Print Picking Sl	lip Directly	
Customize	Picking Slips Print Destination	Desktop Default	Printer Setup
Cations	Use Slip	OEPICKSHIPMENT1.RPT	Browse
Settings	Sort By	Picking Sequence 👻	
Close Ta <u>x</u> es Optio <u>n</u> al Fields Sa	Print Serial/Lot Numbers		
	Require Shipping Labels		
Template Code ACTIVE Q	Print Kit Component Items Print Bills Of Material Component	ent Items	
	Displav Item Quantites	Display on Entry Screen 👻	
	Save		Cancel

- Select the first checkbox at the top of the form to change picking slip printing behavior.
- Choose the Print Destination for picking slips. These settings bypass the setup and print picking sequence dialogs.
  - Choose the Preview setting to do a final preview before printing

Print Destination	Desktop Default	-
Use Silp Sort By	Desktop Default Printer Preview	

# Quick PJC Entry

To speed up data entry, Extended Order Entry will default inserted lines to the previous entry's selections for Contract, Project and Category when multiple lines use the same selections.

The following form shows how the order form appears immediately after pressing the Insert key to create the second line (with default values for the Contract, Project, Category and Cost Class fields):

🛃 PTDEMO - Extended Order Entry	–
<u>F</u> ile <u>H</u> elp O/E Order Entry	
Order No. I 4 4 *** NEW *** > > > > > > > > > > > > > > > > >	ments 0 Last Shipment No.
Customer No. 1200 Q + 7 💀 💀 Mr. Ronald Black	Last Invoice No.
Order Customer Taxes Optional Fields Sales Split Rates Totals	* Required
Template Code ACTIVE Q PO No.	Status: Entered By: Optional Field Value
Order Date 01/10/2020  (IIII On Hold	Accounts Receivab Finance
	b Related Project Invoicing Retainage Requires Purchase Yes
	ral warehouse - Seattle
	☑ Calc. Tax
	cking No.
Description	erence
Type Q. Contract Q. Project Q. Category Cost Cl	
Item         120-1200-10         1006         PRCHCABINET         Materia           Item         120-1200-10         1006         PRCHCABINET         Materia	
<	•
Qty. on Hand Qty. on Sales Order Qty. on Purchase Location 0 0	0 rder Qty. Committed Qty. Available 0
All Locations 0 0	0 14 0 14 0
tem/Tax Components Ship Al Update Ship Item Find	der Order Margin Order Subtotal 0.00 USD
Post Create PO Delete History Prepayment	Create Purchase Order Order from History O/E Forms Qose
Database ID Name Location Description Item Number De	escription Stocking Unit Oty. On Hand Oty. On Purcha Oty. On Sales O Oty. Available O
< [	•

# **View Order Prepayments**

Although the Order Entry screen lets you add a prepayment to an order, Sage 300 doesn't provide a way to view the prepayments that have been entered for orders.

The TaiRox Prepayments button on the right side of the Extended Order Entry screen lets you view all prepayments entered for an order using the Order Entry screen or using the Accounts Receivable Receipt Entry screen.

#### To view order prepayments:

• Click the Prepayments button at the bottom of the screen.

Item/Tax	Components	Ship All	Set Ship Date		Set Location	Update	Ship It	tem Finder C	Irder Margin	Line Finder	Order Subtotal		16,734.27 USD	
Post	Create PO	Delete Histo	Prepayme	nt			Back	orders Pr	epayments	Create Purchase Ord	der Order fr	om History	D/E Forms	Qose
Database ID		Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha	Qty. On Sales O	Qty. Available	Qty. Committed	Qty. Available fo	Qty. On Hand (All)	Qty. On Purcha	Qty. On S ^
SAMINC	4	Port of San Fan	A1-401/0	Desk Calendar	Ea.	87	200	0	87	0	87	574	833	
SAMLTD	1	Central warehou	A1-401/0	Desk Calendar	Ea.	181	200	3	181	0	178	574	833	
<														>

• The program displays a pop-up form that lists all prepayments for the order – 1 in the following example:

🗾 Prepa	yments							-	□ ×
Prepayme	nts								
Customer N	lumber	1200		Mr. Ronald Black					
Order Num	ber i	DRD00000000085							
							Load		
Apply To	Document Numbe	r Payment Date	Posting Date	Customer Currency Code	Payer	Payment in Customer Currence	y Amount Remaining	🖪 Batch Number	🖪 Entry Number
Order No.	ORD00000000085	2022-12-06	2022-12-06	USD	Mr. Ronald Black	3,890.4	5 3,890.45	66	2
<	1		1		1	·		·	>
							Total		3,890.45
							Amount Remainin	ng	3,890.45
									Close

In this example, the prepayment is for one half of the order amount.

• Click the Batch Number or Batch Entry column heading to drill down to the receipt entry in Accounts Receivable.

Note that you cannot drill down to the order from this screen because the order is already open.

🗟 SAMLTD - A/R F	Receipt Entry		– 🗆 🗙
<u>F</u> ile Settin <u>g</u> s <u>H</u> el	p		
Batch Number	◀ ◀ 🛛 🚳 ► ►  ♀ 🥫	Prepayments	
Batch Date	2020-08-30 No. of Entries	2 Total Amount 5,000.000	
Bank	CCB Default Currency	CAD Ceposit Number 53 Deposit Date	2020-08-30
Entry Number	◀ ◀2 ▶ ▶  ♀ 💾	Entered By	ADMIN
Transaction Type	Prepayment	Receipt Date 2022-12-06 Posting Date 2022-12-06	2022 - 12
Customer Number	1200	Mr. Ronald Black Currency	USD
Reference		Account Set	USA
Payment Code	MASTER	Check/Receipt No. 564564	
Document Number	PP000000000000000000000000000000000000		Job Related
Receipt Amount	5,000.00 CAD	Customer Amount 3,890.45 USD	Optional Fields 👩
Apply By	Order Number	Apply To ORD0000000085	

# Create Purchase Orders

TaiRox Create Purchase Order provides a flexible and robust way to create POs from orders or quotes.

Where Sage 300 lets you blindly create purchase orders from orders, TaiRox extends this functionality by letting you preview the inventory items on-screen and edit item quantities, vendors and other data before you create the PO.

Create Purchase Order:

- Lets you create new POs or add lines to existing POs.
- Lets you add PO description and reference information for the PO.
- Lets you add Order Comments and Instructions to PO Comments and Instructions.
- Provides default settings to control reference/description field defaults: Blank, Order Number, etc.
- Provides settings to control the default selection (yes/no) for stock and non-stock items.
- Creates POs for component items of Kits and BOMs displaying item quantities for BOMs within BOMs.
- Enables optional field merging for the PO, for PO lines, and for Kit/BOM items.
- Displays status messages when there is no vendor for an item.
- Creates multiple or combined purchase orders.
- Provides convenient drill-down to purchase orders after creation.
- Lets you cherry-pick POs for creation.
- Lets you print new POs after they are created.

# **Creating Purchase Orders**

Click the Create Purchase Order button at the bottom of the Extended Order Entry screen.

#### Note: The button is greyed out unless the OE order or quote is Posted, Active, and <u>not</u> On Hold.

Order No.		5	N Q +	No. of Shipments	0	Last Shipment No.						
Customer No.	1200	🤇 + 🌄 🛢	Mr. Ronald E	lack		Last Invoice No.						
der Customer Ta	axes Optional Fields Sales	s Spli <u>t R</u> ates T <u>o</u> tal	s									
Template Code	ACTIVE	PO No. 781	8686		Status: Posted	d	Entered By: ADMIN	0	ptional Field		Value	Description
	2022-12-06 (11)								ustomer Credit Warning		No	
Order Date	2022-12-00	On Hold						B	equire PO Number on	Orders and Shipments	Yes	Yes
Order Type	Active ~	From Multiple Quo	tes 🔂	Job Relate	d	Project Invoicing	Retainage	Pr	eferred Shipping Meth	od	FEDEX for Expedited or unde	
		_	••••						PS Zone		WHI	White Zone
Ship-To Location	् + 5	Location 1	Q	Central wareh	ouse - Seattle	•			ser			
Deliver By	2022-12-06	Exp. Ship Date 202	2-12-06			Calc. Tax		N	ote		Allow greater volume discount	
Ship Via	CCT O	Cross-Country Trucki	ng Lines	Tracking No								
			-									
Description	Drop-shipped items fo Black -	December 2022		Reference				<				-
Туре	Q, Item No./ Misc. Charge	Q, Kit/BOM	Description	Q, Price List	Q, Locati	tion Deliver By	Exp. Ship Date	Qty. Ordere	ed Q. Order UOM	Q. Order Weight U	OM Price By F	Pricing UOM
Item	A1-751/B		Stapler - Kings-5	USA	1	2022-12-06	2022-12-06		20 Ea.	lbs.		a.
Item	S1-200/B		Flat Screen 5'6	USA	1	2022-12-06	2022-12-06		20 Ea.	lbs.		a.
Item	#OFFICE SPL KIT	2	Office Supplies	USA	1	2022-12-06	2022-12-06		10 Ea.	lbs.		a.
Item	S1-300/Y		Curved Screen	USA	1	2022-12-06	2022-12-06		15 Ea.	lbs.		a.
Item	S1-200/Y		Flat Screen 5'6	USA	1	2022-12-06	2022-12-06		5 Ea.	lbs.	Quantity E	a.
<												>
	Qty. on Hand	Qty. on Sales Ord	er Qity.o	n Purchase Order		Qty. Committed	Qty. Ava	silable				
Location 1 (Ea.)	0	1:	30 🔛	120	3	0 🕒		0				
All Locations (Ea.)	3	17	30 🔛	120	3	0 🕒		3				
									1		htotal 10,40	2.25 USD
Item/Tax	Components Ship A	( Set Ship	Date	Set Loca	tion	Update Ship	Item Finder	Line Finder	Order Mar	gin	btotal 10.40	2.25 050
Dut Co	ata DO Datata	Utana D					Deskarder	Deserves	Cardo Da		defendition Office	
Pogt Cre	ate PO Delete	History Pre	epayment				Backorders	Prepayments.	Create Pur	chase Order	rder from History O/E Fo	oms Qos

A new window appears to show you the purchase orders that will be created from the items on the order or quote, and let you change how you want to create the POs. If one of the items on the order is a Kit or BOM, the individual component items will appear on the Create Purchase Orders form, as below:

👳 SAMLTD - Create Purchase Ord	ers					- 🗆	×
<u>F</u> ile <u>H</u> elp							
Create Purchase Orders							
Using a Specific Vendor	Vendor Nu	mber 1200 Q	Chloride Systems				
Purchase Order Number	NEW		]+				
Purchase Order Description							
Purchase Order Reference							
Drop-Ship Items							
Transfer Order Header Comment to F	urchase Order Head	er Comment					
Transfer Order Line Comments to Pur	chase Order Line Co	mments					
Transfer Order Line Instructions to Pu	urchase Order Line In	structions					
Merge Order Optional Fields to Purch	ase Orders						
Merge Order Line Optional Fields to F	Purchase Order Lines						
For Kit/BOM Items Merge Componen	t Item Optional Fields	to Purchase Order Lines					
Set Purchase Order Arrival Date to O	rder Deliver By Date						
Create PO [4] PO Number Line	No. Kit/BOM Con	nponent Item Number	Item Description	Location	Quantity	Q UOM	^
No PO00000045	1	A1-751/B	Stapler - Kings-5000 Seri	1	120	Fa	
No PO00000045	2	S1-200/B	Flat Screen 5'6 H x 5'W	1	20	Ea.	
No	- 3 Yes	A1-650/0	Highlighter	1	10	Ea.	
No Kit/BOM Components	3 Yes	A1-655/0	Pen	1	10	Fa	
No from order	3 Yes	A1-656/0	Pencil	1	10	Ea.	
No PO00000045	3 Yes	A1-751/B		1	10	Ea.	
No	3 Yes	A1-752/B	Letter Tray - Kings-5000		10	Pkg.	
No	3 Yes	A1-777/B		1	10	Ea.	
No PO00000045	4	S1-300/Y	Curved Screen 5'H x 6'W	1	15	Ea.	
No	5	S1-200/Y	Flat Screen 5'6 H x 5'W	1	5	Ea.	~
<	Ŭ	01200/1			Ŭ		>
Create Purchase Orders	Select All	Select None				Close	

Use the scroll bar at the bottom of the screen to display more information fields, including item quantities at the current location and at all locations.

Sage 300 lets you create nested BOMs where one or more of the items in a bill of materials is also a BOM. The following example shows how Create Purchase Orders displays items for nested BOMs.



- Line 2 of the order is for 10 units of item A2(IMAGE-1500)G which is a BOM that inludes nested BOM F3(HUNTS-2500)T.
- The window with the green border shows all components of A2(IMAGE-1500)G.
- The nested BOM items are listed after all other BOM items and show properly adjusted quantities.

For example, the order included 10 units of BOM A2(IMAGE-1500)G – and the nested BOM F3(HUNTS-2500)T includes 10 Pkgs of hanging file folders, for an PO quanity of 100 pkgs.

*At this point,* you can "cherry-pick" items for purchase order creation by double-clicking the Create PO column – then click the Create Purchase Orders button at the bottom of the form to generate POs.

• Use the Select All and Select None buttons below the grid to set all items to Yes for Include on POs or No to exclude.

Select All Select None

• Double-click in the Create PO column to "cherry-pick" items for purchase orders:

Create	🖪 PO Number	Line No.	Kit Component	Item Number	Item Description	Location	Quantity	Q UOM	Unit Cost	Q Vendor
No		1		C1-220/B	Krugg 220 Arm	1	10	Ea.		2800
Yes		2		A1-310/0	Halogen Desk	1	10	Ea.		8830
No V3		3		A1-103/0	Fluorescent D	1	10	Ea.		1580
No		4		C2-740/Y	7400 Series P	1	10	Ea.		2800

- Note in the grid above that there are four items. Lines 1 and 4 are for the same vendor, so they will be added to the same PO if you create POs for all items.
- Click the Create Purchase Orders button at the bottom of the screen to create one purchase order per vendor. The form will be updated to show the PO Number of the newly created purchase orders and a message will appear stating the PO number or stating how many POs have been created if it created more than one.

🚯 Message	×	1 Message
Message Description: Purchase order PO000000041 was created. Source: 13:37:24 -	*	Message Description: There were 3 purchase orders created.
Print Help	Close	Pint Close

• Click "Yes" to print new purchase orders, or "No" to continue.

TaiRox Productivity Tools	TaiRox Produ	ctivity Tools
Do you want to print Purchase Order Number P000000049?	2	o you want to print Purchase Orders?
Yes No		Yes <u>N</u> o

- If there is an issue creating a Purchase Order, the Status column will show the reason why the line items cannot be added to the purchase order (for example, "Item vendor not defined" when Using Item Vendor Information option).
- The Create Purchase Order function will create a PO for an item that is a component of a Kit or BOM if that Kit/BOM is on the Sales Order.

Note regarding Kit/BOM items: IC6.2A and higher added support for a default BOM number.

- If a default BOM number is defined for an item, and the BOM number is not set on the order line, the default BOM number defined for the item will be used to create a purchase order.
- If there is no default BOM number, and the BOM number on the order line is not set, then the first BOM number will be used to create a purchase order.

# Changing how POs are created

#### Choose vendor or existing purchase order

Create Purchase Orders provides three main options for creating purchase orders:



- If you select Using Item Vendor Information, the item's preferred vendor (if there is one) will be the default vendor. If there is no preferred vendor, Vendor 1 will be the default vendor.
  - You can override the "Vendor Number" for each line if you choose.
- If you choose "Using a Specific Vendor", you *must* enter a Vendor Number.
  - The "Vendor Number" for each line is set to the Vendor Number you enter.
  - o You can override the "Vendor Number" for each line if you choose.
  - If there is the same vendor number in every detail line, you override the automatically generated purchase order number by entering your PO number in the Purchase Order Number field.

Create Purchase Orders			
Using a Specific Vendor 🔹	Vendor Number	1200 Q	Chloride Systems
Purchase Order Number	**** NEW ****		+

• *If you override the Purchase Order Number* and there is more than one vendor involved, an error message will appear:

Purcha	se Order Number P01001432 +	
[	S Error	×
Purchas	Епог	
Purchas	Description: Incorrect procedure. You cannot use Purchase Order Number PO1001432 because there is more than one purchase order to create for different vendors.	*
Drop		
🔲 Tran	Source: 15:06:48 -	Ŧ
🔲 Tran		ose
🔲 Tran		ose

*If you want to override purchase order numbers and multiple vendors are involved,* select Yes/No in the first column of the grid (Create PO) and process the items one vendor at a time.

• If you select "Using Existing Purchase Order", this determines a specific vendor and the same restrictions apply.

Create Purchase Orders		
Using Existing Purchase Order	<ul> <li>Vendor Number</li> </ul>	8830 Q Delco Electrical Supplies
Purchase Order Number	PO00000034	

- $\circ$   $\,$  Use the Finder beside the Purchase Order Number field to select a PO.
- Use the Drill Down button beside the Finder button to check the PO *after* you choose it from the Finder.

### Setting default PO descriptions, comments, instructions, and options

You can select the default settings for options and for adding descriptions, comments and instructions to the new purchase orders. You can also change the settings for items as you select them.

• Select **File > Settings** from the Create Purchase Orders screen to display default settings.

September 2015 PTDEMO - Extended Order Entry Settings			×	Blank	•
Default Purchase Order Description To	Blank	_		Blank Order Number	
Default Purchase Order Reference To	Blank		•	Order Number Order Description Order Reference	
Default Create Purchase Orders for Stock Items To	No	•		Customer Number	
Default Create Purchase Orders for Non-Stock Items To	No	•		Bill-To Name Ship-To Name	
Save		Ca	ncel		

# Shipping Quantities by Picking Sequence and Filtering Items

The Ship button lets you display items in picking sequence order, item number order, or by location and filter them by ranges of order fields.

For example, the following screens show items ordered by Picking Sequence and selected by Ship-Via code.

Ship by Picking Sequence functionality is very useful when a large order has been picked and now the picked items have to be recorded as shipped.

- The picking slip is in picking sequence order with quantities marked.
- The order entry form is displayed in line number order.

Matching and recording the entries from the picking slip is far easier when you list the items in picking sequence order.

Item selection makes it easier to record partially shipped orders – in this case, where all items with the same Ship-Via code are in one shipment.



- Click the Ship button to filter items and display them in the order you want –by location, item or picking sequence.
- Order items by picking sequence, item number, or location.
- Select items by picking sequence, item, location, price list, category, ship-via code, expected shipment date, date requested, backorder or by order details optional fields (shown above).

#### To use the Ship button to enter quantities:

- Click the Ship button to display the Ship form.
- Select the primary order for listing items.

💌 PTDEMO - Ship	
<u>F</u> ile <u>H</u> elp	
Order By	
Select Order By	
Picking Sequence	-
(None)	
Picking Sequence	
ltem	
Location	

You can choose by Picking Sequence, Item, or by Location.

• Choose the next sorting levels if you require a multi-level sort – such as by Item number and location.

• Choose a field for selecting a range of items.

Select Items By	
Ship-Via Code	-
(None)	
Picking Sequence	
Item Location	
Price List	
Category	
Ship-Via Code	

You can choose picking sequence, item, location, price list, category, ship-via code, expected shipment date, date requested, backorder – or order details optional fields.

• Click the Load button to display selected items in the order you chose (in this case, items shipped by CCT displayed in picking sequence).

SAMLTD - Ship						x
<u>F</u> ile <u>H</u> elp						
Order By						
Select Order By						
Picking Sequence	•					
Location	<b>•</b>					
	-					
(None)	•					
Select Items By	From	То				
Ship-Via Code	✓ CCT	् CCT	0	2		
(None)	•					
(None)	•					
					oad	
				L	080	
Line Number Picking Sequence Item	Description	Location Ord	er UOM 🛛 Qty. On Order (	Order UOM) Qty	v. Shipped	Pric
1 0010 C1-22	0/B Krugg 220 Arm Tilter-Brown	1 Ea.		10	0	US.
4 0023 C2-74		1 Ea.		25	0	US.
3 0040 A1-10		1 Ea.		8	0	US.
2 0041 A1-31	0/0 Halogen Desk Light	1 Ea.		15	0	US.

- Enter quantities in the Qty. Shipped column.
  - You can enter the picked entries quickly using the Tab or Enter keys to move down the column.

Line Number	Picking Sequence	ltem	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped
1	0010	C1-220/B	Krugg 220 Arm Tilter-Brown	1	Ea.	10	10
4	0023	C2-740/Y	7400 Series Posture Chair	1	Ea.	25	0
3	0040	A1-103/0	Fluorescent Desk Lamp	1	Ea.	8	0
2	0041	A1-310/0	Halogen Desk Light	1	Ea.	15	0
							l

• Click the Ship All button at the bottom of the form to fill in the Qty. Shipped field for all items with the Qty. On Order.

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	71	15	C 0	- 0	- 71
All Locations (Ea.)	231	15	4	<b>E</b> 0	231
Ship All					Close

• When you close the Ship form, the Qty. Shipped numbers in the order entry form will be updated with the item quantities that you entered.

Note:

If you change the quantity shipped for an item with a serial number you may see a pop-up Sage 300 windows like the following, allowing you to pick the serial number from the Finder.

Serial Numbers Al	llocation A1-900/B				Location	1	Stock Date	07/01/202	0
<u>S</u> erials     Auto-Allocate Fr	rom								Auto-Alloc.
Serial Numb April-00199	BL		q						×
			Setting	ry Serial Numbers 15 <u>G</u> lobal Setting records	gs •	End Now Set Co Auto Search	teria		
Clear All		Serial Nu April-001 April-001	98	Unformatted Ite A1900B A1900B	. Location	Status Available Available	Stock Date 7/1/2020 7/1/2020		Ŧ
Unit of Measure Serial Nos. Requ Allocated Remaining	Ea. ired	April-002 ∢ <u>H</u> elp		A1900B 	1	Available	7/1/2020	r P	

# Order from History

The Order from History window lets you quickly create new orders for a customer based on previous customer orders.

Using Order from History also tends to increase average order size while decreasing the number of orders processed per dollar of order. The result is lower shipping costs and other operational efficiencies.

• Click the Order From History button to display the pop-up window showing previous orders.

Opending     Control     Control     Control     Control       Opending     Impact to the first set of the fi	Additional Critical Rold Setting Container Group Co
Name         Name <th< th=""><th>Rold Setting</th></th<>	Rold Setting
series in the se	Rold Setting
se das la 1920 - Die - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Marine de La 1920 - Die Control - Die Con	Rold Setting
All and a set of the Major Set of the Ma	
Nature         Image: State Base in the image: State Base inthe image: State Base inthe image: State Base inter Ba	Gustamer Group Go
ek ji kon	Customer Group Co
enter a la sente l'ele l'ele l'ele l'ele l'ele l'ele l'ele l'ele le les les	
San Q berle felo Page  Q aller   Sector   Sector   Sector   Sector   Sector   Caler   Sector   Caler   Sector   Caler   Sector   Caler   Sector   S	
b Stars Q bank risk Dage Q bank risk Dage Q bank Dage Q bank Q bank Q bank (Q bank D lage bank) (Q bank D lage	
1 Vedde Vedde Connett Vedde bedarbornet v Vedde be	
	Description
	ty. Available
Og on tradi Og, on Sales Olar Og, on Sales Olar Og, on Sales Olar Og, on traditional Og, on tradititational Og, on tradititatitatitational Og, on traditational Og, o	ty. Available 0
Long 0 1 0 1 0 1 0 1 0 1 0 1 0 0 0 0 0 0 0	ty. Available 0 0
	ty. Available 0 0 Cla

You can select items from previous purchase orders, update quantities, and copy the selected information into a standard line item row.

Note: The Order from History button is only enabled once the customer has been entered on the form.

### To create a new order from prior ones using the Order tab on the popup form

- Click the "Order from History" button. Order from History... The form that appears has two tabs:
  - The Orders tab lets you select items from previous orders.
  - The Sales History tab is similar, allowing selection of items.

We'll trace through a typical sequence for the Orders tab.

Use the range fields to select past orders for the customer, and then click the Load button. In this case, we've chosen orders since January 1, 2019. (You can add or remove fields from the range field dropdown lists using the <u>Field Settings</u> button – see below.)

le <u>H</u> elp										
Irders Sales	History									
Order Range										
Select Orders	s By		F	rom		То				
Order Date			- 0	01/01/2019		m 12/31/	/9999	(iii)	Additional Criteri	a
(None)			-							
(None)			•						Field Settings	
		Order Date		<u></u>	N. <del>T</del>	0.1.0.1		Order Reference	_	
🖸 Order Nu			Purchase		Ship-To Locati	on Code Urde	r Description	Order Reference		
ORD000000		1/10/2020		v	VAREHS					
		2/5/2020								
ORD0000000 ORD0000000	000070	2/5/2020								
ORD0000000	000070	2/5/2020 2/5/2020								
ORD000000	000070	2/5/2020								
ORD0000000 ORD0000000 ORD0000000	000070	2/5/2020 2/5/2020 7/1/2020 7/1/2020	nents In	clude Instructions	Line Ty	E Item No./	Misc. Charge	Kit/BOM Number	Description	
ORD0000000 ORD0000000 ORD0000000 ORD0000000 DRD00000000 Line Num	000070	2/5/2020 2/5/2020 7/1/2020 7/1/2020	nents In N		Line Ty	E item No / C1-220/8	Misc. Charge	Kit/BOM Number	Description Krugg 220 Am	Price L
ORD0000000 ORD0000000 ORD0000000 ORD0000000 DRD00000000 Line Num	000070 00066 00065 00064 Include No	2/5/2020 2/5/2020 7/1/2020 7/1/2020 7/1/2020 7/1/2020		0		_	Misc. Charge	Kt/BOM Number	Krugg 220 Am Halogen Desk Li	Price L CANAL CANAL
ORD000000 ORD000000 ORD000000 DRD000000 Line Num 1 2 3	000070 00066 00065 00064 Include No No	2/5/2020 2/5/2020 7/1/2000 7/100 7/1/2000 7/1/2000 7/1/2000 7/1/2000 7/1/20	N N N	0 0 0	Item	C1-220/B A1-310/0 A1-103/0	Misc. Charge	Kit/BOM Number	Krugg 220 Am Halogen Desk Li Fluorescent Des	Price L CANAL CANAL CANAL
ORD000000 ORD000000 ORD000000 DRD000000 Line Num 1 2 3	000070 00066 00065 00064 Include No	2/5/2020 2/5/2020 7/10 7/1/2020 7/1/2020 7/1/2020 7/1/2020 7/1/200	N	0 0 0	item item	C1-220/B A1-310/0	Misc. Charge	Kit/BOM Number	Krugg 220 Am Halogen Desk Li	Price L CANAE CANAE CANAE
ORD000000 ORD000000 ORD000000 DRD000000 Line Num 1 2 3	000070 00066 00065 00064 Include No No	2/5/2020 2/5/2020 7/1/2000 7/100 7/1/2000 7/1/2000 7/1/2000 7/1/2000 7/1/20	N N N	0 0 0	Item Item Item	C1-220/B A1-310/0 A1-103/0	Misc. Charge	Kit/BOM Number	Krugg 220 Am Halogen Desk Li Fluorescent Des	Price Li CANAD CANAD CANAD CANAD
ORD000000 ORD000000 ORD000000 DD000000 Line Num 1 2 3 4	000070 00066 00065 00064 Include No No	2/5/2020 2/5/2020 7/1/2020 7/1/2020 7/1/2020 No No No No No	N N N	0 0 0	Item Item Item	C1-220/B A1-310/0 A1-103/0 C2-740/Y			Krugg 220 Am Halogen Desk Li Fluorescent Des 7400 Series Pos	Price L CANAE CANAE CANAE CANAE
ORD000000 ORD000000 ORD000000 DD000000 Line Num 1 2 3 4	000070 000066 000065 000064 Include No No No	2/5/2020 2/5/2020 7/1/2020 7/1/2020 7/1/2020 7/1/2020 No No No No No	N N N	0 0 0	Item Item Item Item	C1-220/B A1-310/0 A1-103/0	Misc. Charge Qty. Corr		Krugg 220 Am Halogen Desk Li Fluorescent Des	Price L CANAL CANAL CANAL CANAL

- Click any order in the top grid to see the order details in the bottom grid.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the items in the previous order.

Select All
------------

• Double-click the Include column to select individual lines (the Include column displays Yes).

Line Num	Include	Include Comments	Include Instructions	Line Ty	🕑 Item No./Misc. Charge	Kit/BOM Number	Description	Price List
1	Yes	No	No	ltem	C1-220/B		Krugg 220 Arm	CANADA
2	No	No	No	Item	A1-310/0		Halogen Desk Li	CANADA
	Yes	No	No	ltem	A1-103/0		Fluorescent Des	CANAD/
4	No V3	No	No	Item	C2-740/Y		7400 Series Pos	CANADA

• Edit the **Qty. Ordered** column to change the quantities for the new order that you are creating. (The Original Quantity Ordered field shows the quantities from the previous order.)

Number	Description	Price List	Location	Order UOM	Original Quantity Order	Qty. Ordered	Order Unit Price	Order Unit Cost	Margin A
	Krugg 220 Arm	CANADA	1	Ea.	10	15	0.000000	178.605385	-
	Halogen Desk Li	CANADA	1	Ea.	10	0	0.000000	34.680703	
	Fluorescent Des	CANADA	1	Ea.	10	10	0.000000	29.121971	
	7400 Series Pos	CANADA	1	Ea.	10	0	0.000000	0.000000	

- When you have finished editing items from this order, click the Order button at the bottom of the screen to add the items to the new sales order.
- Select another order from the top grid, choose the items that you want to order, enter the new quantities, and again click the Order button.
- Click the Close button when you have finished adding items from prior orders.

Lin Type	Q, Item No./ Misc. Charge	Q, Kit/BOM	Description	Q, Price List	Q Location	Deliver By	Exp. Ship Date	Qty. Ordered	Q Orde
1 Item	C1-220/B		Krugg 220 Arm Tilter-Brwn	CANADA	1	1/10/2020	1/10/2020	15	Ea.
2 Item	A1-103/0		Fluorescent Desk Lamp	CANADA	1	1/10/2020	1/10/2020	10	Ea.
3 Item	#OFFICE KIT	1	Office Furniture Kit Stand	USA	1	1/10/2020	1/10/2020	1	Ea.
4 Item	A1-310/0		Halogen Desk Light	USA	1	1/10/2020	1/10/2020	15	Ea.
5 Item	A2(IMAGE-1500)G		Image 1500 Series Desk	USA	3	1/10/2020	1/10/2020		Ea.
•	m								E.

The order screen grid will be populated with line items from the historical order

If security is enabled and the user has Unit Price Override rights, then a confirmation and completion messages will appear.



Important Note: Yes means use historical prices. No means that current pricing will be in effect.

### Use the "Field Settings" button to customize the list of fields for selecting orders:

Click the **Field Settings** button to change the fields that appear in the "Select Orders By" dropdown lists on the Order From History screen.

r								
S PTDE	MO - Extended	Order	Entry Field Settings		×	1		
Customer Salespen Salespen Salespen All Salesy Ship-Via Default L Tax Grou Entered I ACt# Courier Customer Maximum Note	ion 3 ion 4 ion 5 ionple Code ocation Code p Ay Credit Warning Order Amount	E	Include ->       <- Exclude       All ->       <- None	Order Number Order Date Customer Number Order Type Ship-To Location Code Purchase Order Number Salesperson 1 Expected Ship Date Deliver By Date On Hold Preferred Customer Approved	Up Down	ž (	Additional Criteria Reld Settings	
	Order Date y Customer	-					Description Krugg 220 Arm	Price I

- The list of fields on the right are the fields that will appear in the Select Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

### Using the Sales History tab

The Sales History tab allows a similar sequence of operations – selecting, editing of quantities and copying to the new sales order.

e <u>H</u> e	ab								
Irders	Sales History								
Item Ra	ange								
	Items By		From	То					
			A1-310/0		470/T			_	_
Item No	umber	•	A1-310/0	Q 🗗	470/1	Q [	Additional	Criteria	_
(None)		-							
(None)									
(None)		•							
Include	🕑 Item Number	Kit/BOM Number	Description	Order Number	Order Date	Purchase Order Number	Location	Order UO	м
No	A1-310/0		Halogen Desk Li	ORD00000000028	12/1/2019		1	Ea.	
No	A1-310/0		Halogen Desk Li	ORD0000000032	1/4/2020		1	Ea.	
No	A1-320/0		50W/12V Halog	ORD0000000004	2/17/2019		1	Ea.	ĥ
No	A1-320/0		50W/12V Halog	ORD0000000015	9/4/2019		1	Ea.	
No	A1-320/0		50W/12V Halog	ORD0000000025	10/12/2019		1	Ea.	
No	A1-320/0		50W/12V Halog	ORD0000000032	1/4/2020		1	Ea.	
No	A1-320/0		50W/12V Halog	ORD00000000040	4/5/2020		1	Ea.	
No	A1-400/0		Desk Note Book	ORD0000000004	2/17/2019		4	Ea.	
No	A1-400/0		Desk Note Book	ORD0000000032	1/4/2020		4	Ea.	L
No	A1-450/0		Bulletin Board	ORD0000000004	2/17/2019		4	Ea.	
No	A1-450/0		Bulletin Board	ORD0000000032	1/4/2020		4	Ea.	
No	A1-900/B		Answering Mach				1	Ea.	
									•
		Qty. On Hand Qt	ty. On Sales Order (	aty. On Purchase Order	Qty. C	ommitted Qty	. Available		
ocation	(Ea.)	128	15 🔛	70	2	0 🔛	128		
Locat	ions (Ea.)	443	15 🛄	195	12	0 🔛	443		

- Select the range of item numbers, order numbers, order dates, PO numbers, or categories that you want to use as search criteria, then click the Load button.
- See the steps listed above for including items from history on the new order.

### Setting default descriptions, comments and instructions for included items

You can select the default settings for taking descriptions, comments and instructions from the original orders. You can also change the settings for each item as you select them.

• Select File > Settings from the Order From History screen.

PTDEMO - Extended Order Entry Settings	<b>—</b>
Use description from selected line for detail description     Include comments for each selected line     Include instructions for each selected line	
Save	Cancel

• Select the checkboxes if you want them to be included by default from the original sales orders.

## **Item Quantities**

The Item Quantities feature lets you display item quantities available at all inventory locations – including locations in other companies – while entering an order.

### To display quantities for multiple locations and companies:

• Select the **Extended Order Entry > File > Settings** menu choice to change the Item Quantities display settings.

(			_
PTDEMO - Extended Ord	der Entry Settings		3
Post Order and Print Picking	g Slip Directly		
Picking Slips			
Print Destination	Desktop Default	<ul> <li>Printer Setup</li> </ul>	
Use Slip	OEPICKSHIPMENT1.RPT	Browse	
Sort By	Picking Sequence	•	
Print Serial/Lot Numbers			
Require Shipping Labels			
Print Kit Component Items			
Print Bills Of Material Comp	oonent Items		
Display Item Quantites	Display on Entry Screen		
Save	Do Not Display	Cancel	
	Display on Entry Screen Display on Separate Screen	Cancer	

• **Do Not Display** – shows only total quantities and quantities for the current line item location – like the standard Order Entry screen.

Location 1 (Ea.)	Qty. on Hand 80	Qty. on Sales Order 20 🗳	Qty. on Purchase Order 20 🕒	Oty. Committed	Qty. Available 80	
All Locations (Ea.)	235	20 🛄	24 🛄	0 🖪	235	
Item/Tax Compo	nents Ship Al	Set Shi <u>p</u> Date	Set Location	Update Ship	Item Finder Line Finder	. Order Margin Order Subtotal 10.402.25 USD
Pogt Create PO	Delete	History Prepayment			Backorders Prepayments	Create Purchase Order Order from History O/E Forms Qose

• **Display on Entry Screen** – includes a grid at the bottom of the screen that displays quantities at all locations, in the current company and any associated companies.

Item/Tax	Components	Ship All	Set Ship Date		Set Location	Update	Ship It	em Finder	Line Finder	Order Margin	Order Subtotal		0.00 USD	
Pogt	Create PO	Delete Histo	ry Prepaymen	it			Back	orders Pre	epayments	Create Purchase On	der Order fro	om History	0/E Forms	Qlose
Database ID		Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha	Qty. On Sales O	Qty. Available	Qty. Committed	Qty. Available fo	Qty. On Hand (All)	Qty. On Purcha	Qty. On S ^
SAMINC	1	Central warehou	A1-105/0	13W Mini Fluore	Ea.	75	105	15	75	0	60	387	500,535	
	2	Portland Office	A1-105/0	13W Mini Fluore	Ea.	143	30	8	143	0	135	387	500,535	~
SAMINC														

 Display on Separate Screen – displays the item quantities at all locations in a separate window.

Location 1	(Ea.) Gty. on Hand		13 🦉	Qty. on Purchase Order 200		Qty. Committed 0	Qty. Av	181					
All Local	tions 574	•	13 🕒	833	<b>E</b>	0 🕒		574					
SAMLT ile Help	D - Item Quantities											-	
	Description	Item Number	Description				Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale			
1	Central warehouse - Seattle	A1-401/0	Desk Calendar	Ea.	181	200	0	181	0	181	574	833	
2	Portland Office	A1-401/0	Desk Calendar	Ea.	136	233	0	136	0	136	574	833	
3	Newark, New Jersey	A1-401/0	Desk Calendar	Ea.	170	200	0	170	0	170	574	833	
4	Port of San Fancisco	A1-401/0	Desk Calendar	Ea.	87	200	0	87	0	87	574	833	
1	Central warehouse - Seattle	A1-401/0	Desk Calendar	Ea.	181	200	13	181	0	168	574	833	
													Close

Click the All Locations button to move the Quantities in front of other windows (if hidden).

The All Locations button appears at the bottom of the Extended Order Entry screen if you choose to display quantities on a separate screen.

Item Quantities will be refreshed as you move to other detail lines.

### Selecting which companies and locations are displayed

An administrator must first set up the Sage 300 company databases and locations that are displayed in the Item Quantities grid.

• Go to TaiRox Productivity Tools > Options, and click the Item Quantities tab.

DTDEMO	- Options				– 🗆 🗙
<u>F</u> ile <u>H</u> elp					
Menu Item Qu	antities				
Database ID	Description	User ID	Password	Location	Test Connection
SAMLTD SAMINC	Sample Company Limited Sample Company Inc.	sa	page 1224	1	Move Up
SAMINC SAMLTD	Sample Company Inc. Sample Company Limited	sa sa	1000 (224) 1000 (224)	2	Move Down
PTDEMO 🖵	Productivity Tools Demo	sa			
CHKVAN CPYINC CPYLTD PTCOPY PTDEMO					

- Use the Insert and Delete keys to add or remove locations and companies from the Item Quantities grid and to change the order that locations appear.
- Note for Sage 2023 PU2 and higher: Item data will *NOT* appear unless the user ID and password have sufficient permissions to access the Sage 300 Vault database as well as the individual company DBs.

Each user can customize the item quantities grid by hiding and moving columns to suit their own needs.

For example:

- You can hide the Database ID and Name columns if all locations are in the same Sage 300 company.
- You can also hide the Item Description and Stocking Unit if these are the same at all locations. Hide and re-arrange columns by dragging and dropping.

<mark></mark>	/IO - Item Quant	ities								- 0	×
Location	Description	Item Number	Qty. On Hand	Qty. On Purchase	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available fo	Qty. On Hand (All)	Qty. On Purcha	Qty. 🔦
1	Central warehou	A1-103/0	137	160	10	137		127	657	286	Ξ
2	Portland Office	A1-103/0	262	0	9	262	0	253	657	286	
3	Newark, New Je	A1-103/0	42	126	0	42	0	42	657	286	1
4	Port of Vancouver	A1-103/0	206	0	11	206	0	195	657	286	-
•											•
<u>R</u> efree	sh									Glos	e
# BOM or Kit – Use as Default

Sage 300 Inventory Control has a "Use as Default" setting for BOMS and Kits, as shown here:

	/C Bills of Material		- 🗆 X
<u>F</u> ile <u>H</u> elp			
Bills of Material	< ▶ ▶ ♀ +		
A2(IMAGE-1500	Master Item Number A2(IM	AGE-1500)G Image 1500 Series Desk Accessories	
A1-103	BOM Number 1	Q 📑 🔽 Use As Default	
A1-655	Description		
A1-656	Fixed Cost	0.00 Build Quantity 1	
A1-756	Variable Cost	10.00 per Build Quantity Unit of Measure Ea.	
A1-757	Start Date / /	End Date / /      Inactive	
A1-759	Comments Image	-1500 Series Desk Accessories	
A1-760,			
A1-778	Q Component Item Nurr	ber Description Q Component's BOM Number	🔂 Compor 📤
	F3(HUNTS-2500)T	Hunts 2500 Series Filing Cabinet 1	Yes
	A1-103/0	Fluorescent Desk Lamp	No
	A1-655/0	Pen	No
	A1-656/0	Pencil	No
	A1-750/G	Stapler - Image-1500 Series	No 👻
	•	III	P.
< <u> </u>			
	Hide Tree >> Save	Delete	Glose

In Extended Order Entry, this setting causes the BOM number to be defaulted when the BOM item is added to an order.

(By contrast, in Sage 300 Order Entry, this setting *does <u>not</u>* cause the BOM number to be defaulted.)

## Backorders

The Backorders feature lets you display all items on backorder for the current customer – while entering an order.

## To display backordered items on multiple prior orders:

• Click the Backorders button at the bottom of the screen:

tem/Tgx Components Ship All Set Shig Date	Set Location	Update	Ship	Item Finder	Line Finder	Order Margin 0	rder Subtotal	10,402.25 USI	D
Pogt Create PO Delete History Prepayment				Backorders	Prepayments	Create Purchase Order	Order from History	O/E Forms	Qose

The Customer Backorders popup appears, and defaults to orders for the current customer number and a full range of order dates.

SAMLTD - Customer Backorders	-	×
EileHelp		
Order Range Customer Number 1200 Mr. Ronald Black		
Order Date To 99999-12-31 III Load		

• Click the Load button to display all orders for the current customer with backordered items.

Or

- Click the Customer Number button to look up a different customer using the SmartFinder.
- Specify the range of order dates that you want to search.
- Click the Load button to display orders with backordered items.

The program displays all orders with backordered items for the customer within the range of order dates.

Eile Help Order Range Customer Number Order Date	Customer Backo 1200 From 2023-01-01  #	C Mr. To	Ronald Black		Load		- • ×	Data         Status         Status <th></th>	
CRD000000008	Order Date 7 2023-07-14	Order Descrij August 2023		Order Referer	nce Purchase Order Nu 2023-00004831	Bil-To Name Mr. Ronald Black	Order Completed		An and a second
	<b>↓</b>	_							
< [2] Item	Description	Kt/BOM Number	Price List	Location	Original Quantity Ord	Quantity Shinoed to date	Ouantity Backordered	Caractic Security Learning The security of USER (1997) (1997) The security	- D X
🗳 item	Description Wastebasket	Kit/BOM Number		Location	Original Quantity Ord	Quantity Shipped-to-date	Quantity Backordered	In the Characteristic State	- C X
A1-800/0 C1-250/R	Wastebasket Krugg 250 Arm		Price List USA USA	Location	Original Quantity Ord 10 6	9	Quantity Backordered	In the Characteristic State	These is a second se
Item A1-800/0 C1-250/R	Wastebasket		USA	1	10	9	Quantity Backordered	In the Characteristic State	- 5 jijini jijini jijini jijini jijini jijini jijini jijini

- Highlight an order in the top grid to view the backordered item details in the bottom grid.
- Double-click the order number or click the Order Number column heading to drill down to the order using the Extended Order Entry program.
- Double-click the item number in the bottom grid or click the Item column heading to drill down to the item details using the Extended Inventory Items program.

## Using the SmartFinder to Look Up Customer Numbers:

• Click the Customer Number button to look up a different customer using the SmartFinder.

SAMLTD - Customer Backorders		-	×
<u>F</u> ile <u>H</u> elp			
Order Range Customer Number 1200			
Order Date	To 9999-12-31 IIII Load		

• Enter part of a name or address (or contact phone or email address) and click the Find button.

SAMLTD - Custon	ner Backorders				—	
<u>F</u> ile <u>H</u> elp						
Search ron						Find
Active Customers Onl	у					
Customer Number	Status	Customer Name	Short Name	🖪 Address Line 1	City	State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles	CA
1400	Active	Coastal Electric Company	COAST	586 Tanner Road	Toronto	Ontario
1970	Active	Mr. Ronald English	ENGLI	2375 Hudson Avenue	Fairbanks	AK
7200	Active	CanAm Industries	CANAM	1898 King George Street	Toronto	Ontario

In this example:

- We entered "ron" in the Search field and pressed the Enter key to search for Ronald Black.
- The program got 4 results, 2 with "**Ron**ald" in the Customer Number field, and 2 with "To**ron**to" in the city field.

See <u>SmartFinder – Customers</u> for more information on using the customer SmartFinder.

## Update Order

The Update Order functionality lets you make multi-faceted changes to an order – affecting multiple detail lines and order quantities.

• Open the order that you want to change, then click the "Update..." button to display the Update Lines window for updating orders.

Ek Edip O/E Order Entry =	X     SPT0N0-Updetines     He Hop
Deter Tile         4         Buddemanning         3         3         3         4         S         4         Buddemanning         S         4         S         5         S         <	Udder Oder Binz Teol Ruck Hands Richan Nander Oder & Nander Fanz
Temple Cole         CTITIE         Q         Point         Base Point         Description         Description <td>Pice Approved lip Personst</td>	Pice Approved lip Personst
Oder Type         Adaw         From Nulliple Juntes         Add Peters         Means Oder Reset         Means Oder Reset           Strap To Location         C         +         -	
Delwer for         201/0222         10         500 delwer         201/0222         10         100 delwer         100 delwer <td< td=""><td></td></td<>	
Term         Charling         QL BB/RK         Developed         QL Forstar         QL costan         Other State         Dev         Developed         Developed         QL Forstar         QL costan         Developed         Develop	
2 Juni (*11935) timp unit (*1. k. c) 1 2.0.0022 2.0.0022 Ex. Ex. Carming Ex. 3 Juni A10025 Carming Far, 503A 2.0.00222 Ex. Ex. Carming Ex. 4 Juni A17028 Carming Far, 70, 55A 3.0.00222 5.0.00222 Ex. 5 Juni 0.1110 Executive (*1. 7. 2.16A 2.0.00222 Ex. 5 Juni 0.1110 Executive (*1. 2.16A 2.0.0022 Ex. 5 Juni 0.1110 Ex. 5 Juni 0.1110 Executive (*1.16A 2.0.0022 Ex. 5 Juni 0.1110 Ex	
e	
Op on New         Op on Select Oper         Op on Performance         Op on Performance         Op on Select Operation         Operation         Op on Select Operation         Op on Select Operation         Op on Select Operation         Operation <thoperation< td="" th<=""><td>Process Com</td></thoperation<>	Process Com
ten Typ., Corgovern. 9 p. N. Set Pig Data Set Licogen Update. 9 p., ten Finder., Oder Rays., Lice Finder., Oder Satiste 600 (200	

The Update Lines screen lets you select from twelve different update procedures:

ſ		SAMLTD - Update Lines	
	E	ile <u>H</u> elp	
	Г	Update Order	
		Update Order Kit Number	-
	Γ	Update Order Kit Number Update Order BOM Number Update Item Expected Ship Date Update Item Prices Substitute Items Update Addresses Update Item Deliver By Date Commit Quantities Uncommit Quantities Change Salesperson Code Zero Quantity Ordered For Items Not In Stock Change Item Location	

Each choice has appropriate options.

When you click the Process button, the program displays all changes in the window as it processes the order lines. It will also display a message if no changes are made.

## Updating an Order Kit Number

Update Order	
Update Order Kit N	Number 🗸
Kit Item Number	#OFFICE KIT Q Office Furniture Kit
	Order Kit Number From 1 Q To 2
Price Approved By	Password
Updating Line Nu	der Number ORD0000000066 mber 1 00000000066 updated.

- Select Update Order Kit Number from the dropdown list.
- Use the Finder to select the Kit Item Number.
- Select the current "From" kit number and the new "To" kit number.

• Click the Process button and select Yes when the confirmation message appears.



Depending on your permissions, you may need to have price changes for a different kit number approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

**Note:** To change kit details, Update Order deletes the kit detail line from the posted order and then adds a new kit line with the appropriate changes – because Sage 300 does not allow it to change the details on a posted kit line.

However, *if an order has been partially shipped*, the kit order lines cannot be deleted – this is also a restriction imposed by Sage 300 business logic – and the program will display an error message.

To change kit details on a partially shipped order:

- 1. Change the Qty. Ordered for the kit item line to 0.
- 2. Insert a new order line, and specify the new kit number.

#### **Updating an Order BOM Number**

Update Order
Update Order BOM Number
Master Item Number A2(IMAGE-1500)G Q Image 1500 Series Desk Accessories
Order BOM Number From 1 Q To 2
Price Approved By
Updating BOMs for Order Number ORD000000000000000000000000000000000000

- Select Update Order BOM Number from the dropdown list.
- Use the Finder to select the BOM Item Number.
- Select the current "From" BOM mnumber and the new "To" BOM number.
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry
Are you sure you want to update this order?
<u>Y</u> es <u>N</u> o

Depending on your permissions, you may need to have price changes for a different BOM number approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

## **Updating Item Expected Ship Date**

Update Order				
Update Item Experi	cted Ship Date	•	Specific Item     The second sec	
Item Number	A1-310/0 Q Expected Ship Date	Halogen Desk Light	nt	
Update Order E	xpected Ship Date Also			
-				

- Select Update Item Expected Ship date from the dropdown list.
- Specify if this change is for a specific item, a range of items, or all items.

Specific Item	-
Specific Item List Of Items All Items	

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

🗵 РТС	EMO - Update Lines			
File H	Help			
Updat	e Order			
Updat	e Item Expected Ship Date		<ul> <li>List Of Items</li> </ul>	- 6
	PTDEMO - Extended Ord	ler Entry		
V Up	Q, Item Number	Item Description		
		_		

Use the Finder to look up items. Use the Insert key to add new empty lines.

• To Import a list of items from a spreadsheet, click the Import button.

Import... Reset Defaults Close

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

- Enter the new Expected Ship Date.
- Click the Update Order Exptected Ship Date Also if this also changes the order date.
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry	83
Are you sure you want to update this order?	
<u>Y</u> es <u>N</u> o	

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

#### **Updating Item Prices**

Update Order		
Update Item I	Prices	✓ Specific Item ✓
Item Number		
Price List	USA	

• Select Update Item Prices from the dropdown list.

• Specify if this change is for a specific item, a range of items, or all items.

Specific Item	-
Specific Item List Of Items All Items	

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

S PTD	EMO - Update Lines			
File H	Help			
Updat	e Order			
Updat	te Item Expected Ship Date		<ul> <li>List Of Items</li> </ul>	- 5
ſ	PTDEMO - Extended	Order Entry		- • 🖂
🔽 Up	Q, Item Number	Item Description		
V OP		,		
	· · ·			

Use the Finder to look up items. Use the Insert key to add new empty lines.

o To Import a list of items from a spreadsheet, click the Import button.

Import	Reset Defaults	Close

See Details for importing a list of items or item substitutions for spreadsheet format details.

- Choose the price list that you are using for the updates.
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry	83
Are you sure you want to update this order?	
<u>Y</u> es <u>N</u> o	

The program updates prices for the items you specified to the prices on the price list.

#### Substituting Items

Update Order	
Substitute Items	✓ List Of Items
Only Substitute Items On This Order That Have Not Been Shipp	ped
Retain Existing Line Item Unit Price	
Price Approved By Password	

- Select Substitute Items from the dropdown list.
- To specify the substitute items list, click the Zoom button beside the dropdown, and add "From" items (or kits/BOMs) and "To" items (or kits/BOMs) to the list in the form that appears.

	PTDEMO - Update	: Lines			- • •	
	Update Order Substitute items		<ul> <li>List Of Items</li> </ul>			
	-	is On This Order That Has Never Been St Item Unit Price				
S PTDEMO - E	tended Order Entry					
_	tended Order Entry umber Q From Kit/BOM	Item Description	Q. To Item Number	Q. To Ke/Br A	tem Description	- • 💌
_		kem Description 2300 Series Posture Chair	Q. To Item Number C2-230/Y	Q To KR/BC A		
Q. From Item N				Q To Ke/BF.4	Item Description	
Q. From Item N				Q To Ke/87.4	Item Description	
Q. From Item N				Q. To K2/8/J	Item Description	

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• To Import a list of items from a spreadsheet, click the Import button.

Import... Reset Defaults Close

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

- Choose whether to "Only Substitute Items On This Order That Have Not Been Shipped." If this option is selected, a line that is partially shipped will not be touched.
- Choose whether you want to "Retain Existing Line Item Unit Price."
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry	
Are you sure you want to update this order?	
<u>Y</u> es <u>N</u> o	

Depending on your permissions, you may need to have price changes for items approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished.

#### **Updating Customer Addresses**

•

- Select Update Addresses from the dropdown list.
- Choose which addresses you want to update customer bill-to address or ship-to address.
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry	J
Are you sure you want to update this order?	
<u>Y</u> es <u>N</u> o	

The program updates the address from the customer record.

#### Updating the Item Deliver-By Date

Update Order				
Update Item Deliv	ver By Date	✓ Specific Item		
Item Number	A1-105/0	13W Mini Fluorescent Bulb 01/10/2020		
Update Order I	Deliver By Date Also			

• Select Update Update Deliver By Date from the dropdown list.

• Specify if this change is for a specific item, a range of items, or all items.

Specific Item	-
Specific Item List Of Items All Items	

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

	te Order te item Deliver By Date		List Of Items	• •
	PTDEMO - Extended Ord	er Entry		
V Up	Q Item Number	Item Description		
	K			

Use the Finder to look up items. Use the Insert key to add new empty lines.

 $\circ$  To Import a list of items from a spreadsheet, click the Import button.

l			
I	Import	Reset Defaults	Close

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

- Enter the new Deliver By Date.
- Click the Update Order Deliver By Date Also if this also changes the date for the order.
- Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry
Are you sure you want to update this order?
<u>Y</u> es <u>N</u> o

The program will display progress messages as it updates lines and tell you when it is finished.

## **Committing Quantities**

Update Order			
Commit Quantitites		✓ Specific Item	
Item Number	A1-105/0 Q	13W Mini Fluorescent Bulb	]
<ul> <li>Specify if</li> </ul>	this change is for	a specific item, a range of items, or all items.	

Specific Item	-
Specific Item	
List Of Items	
All Items	

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



• To Import a list of items from a spreadsheet, click the Import button.

 Import...
 Reset Defaults

 Close
 Close

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

• Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry
Are you sure you want to update this order?
Yes No

The program will display progress messages as it updates lines and tell you when it is finished.

## **Uncommitting Quantities**

Update Order				
Uncommit Quantitites	<ul> <li>Specific Item</li> </ul>	-		
Item Number A1-105/0	Q 13W Mini Fluorescent Bulb			

• Specify if this change is for a specific item, a range of items, or all items.

Specific Item	-
Specific Item List Of Items All Items	

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

Update Order Uncommit Quantitites		✓ List Of Items	• 5
PTDEMO - Extended Ord	er Entry		
Q, Item Number	Item Description		

Use the Finder to look up items. Use the Insert key to add new empty lines.

 $\circ$  To Import a list of items from a spreadsheet, click the Import button.

Import... Reset Defaults Close

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

• Click the Process button and select Yes when the confirmation message appears.



The program will display progress messages as it updates lines and tell you when it is finished.

#### **Changing Salesperson Code**

Update Order
Change Salesperson Code
From Salesperson Code
To Salesperson Code

• Specify the From and To salesperson codes.

From Sales	person Code	BB	Q	Bill Bhaisson	
To Salespe	erson Code	SP	Q	Susan Prommer	

- Use the Finder to look up salespeople.
- Click the Process button at the bottom of the form and select Yes when the confirmation message appears.

Extended Order Entry	23
Are you sure you want to update th	is order?
<u>Y</u> es	<u>N</u> o

The program will display the following messages when it performs the update.

Updating salesperson codes for Order Number ORD00000000069	
Order Number ORD00000000069 updated.	

## Zeroing Quantity Ordered For Items Not In Stock

Update Order					
Zero Quantity Order	ed For Items Not In Stock	✓ Specific Item	•		
Item Number	F2-102/0	File Folder Labels			

**Note:** This choice reduces quantities to zero on orders where the items have zero quantity on hand at the location specified on the detail line.

• Specify if this change is for a specific item, a range of items, or all items.



- $\circ$   $\,$  For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



• To Import a list of items from a spreadsheet, click the Import button.

Import	Reset Defaults	Close
--------	----------------	-------

See <u>Details for importing a list of items or item substitutions</u> for spreadsheet format details.

Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry	23
Are you sure you want to update this order?	
<u>Y</u> es <u>N</u> o	

The program will display progress messages as it updates lines and tell you when it is finished.

## **Changing Item Location**

Update Order		
Change Item Locati	ion	✓ Specific Item
Item Number	<u>ू</u>	
From Location	<u>्</u>	
To Location	Q [	

This choice lets you change the item location for fulfilling orders. Note that the location can only be changed on order lines where the quantity ordered is greater than 0, and the quantity committed or quantity shipped is 0.

• Specify if this change is for a specific item, a range of items, or all items.



- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

commit Quantitites		ems 🗣
DTDEMO - Extended	Order Entry	
Q Item Number	Item Description	
	K	

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o To Import a list of items from a spreadsheet, click the Import button.

Import... Reset Defaults Close

See Details for importing a list of items or item substitutions for spreadsheet format details.

Specify the "From Location" that you want to replace, and the new "To Location".

From Location	2	Q	Portland Office
To Location	1	Q	Central warehouse - Seattle

• Click the Process button and select Yes when the confirmation message appears.

Extended Order Entry
Are you sure you want to update this order?
<u>Y</u> es <u>N</u> o

The program selects orders with the specified From Location on item lines.

#### Details for importing a list of items or item substitutions

- Click the Import button at the bottom of the item list popup form and select the spreadsheet containing the item list. The imported list will replace the current list of items.
- Use the Insert key to add more rows to the list.
- Use the Delete key to remove items from the imported list.
- Click the Reset Defaults button to delete all items from the list.

#### Import format:

You can find sample import files in directory \Sage300\XL61A\Documentation.

**Note:** The Excel Spreadsheet for an item list (Items.xlsx) is a single column with "ITEMNO" as the column heading in the first row.



The Excel Spreadsheet for an item substitution list (ItemSubstitutes.xlsx) must have at least these four columns. The program will ignore any other column names.

	Α	В	С	D
1	ITEMNOFROM	DTLNOFROM	ITEMNOTO	DTLNOTO
2	C1220B		C1220T	
3	#OFFICE SPL KIT	1	#OFFICE SPL KIT	2

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.