

TaiRox Productivity Tools - Extended PO Receipt Entry User Guide

Extended PO Receipt Entry - Summary

[SmartFinder \(Receipts\)](#) Finds receipts quickly.

[SmartFinder \(Vendors\)](#) Find a vendor quickly from a name, description, phone number or an address.

[SmartFinder \(Items\)](#) Find an item quickly from partial words.

[Quantities Display](#) Show item quantities at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module.

[Item Quantities](#) Display quantities available at other locations or in other companies while entering a purchase order.

[Drop Ship](#) Drop ship dozens of purchase order detail lines in a single operation.

[Quick PJC Entry](#) Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

[Receive in Sorted Order](#) Receive items by item Number or several other selectable orders.

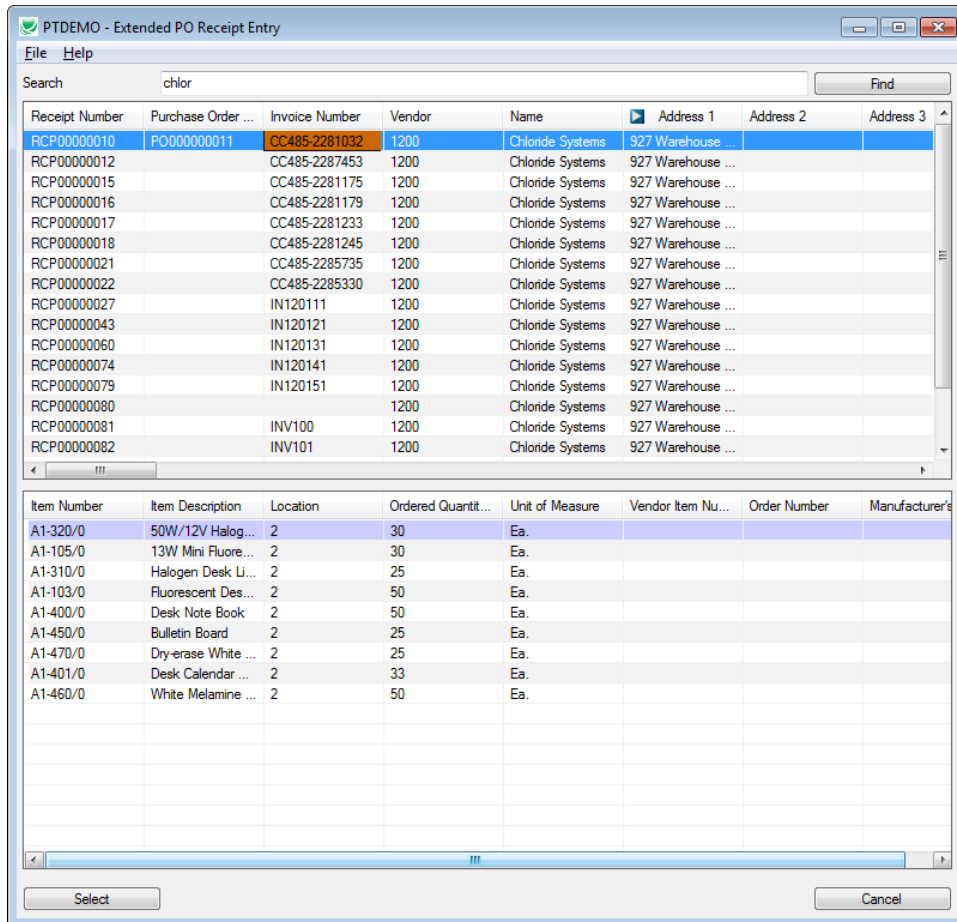
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SmartFinder (Receipts)

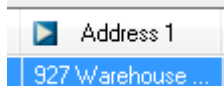
The SmartFinder is launched from the Receipt Number button.

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

Display: The top grid displays matches in the matching purchase orders. The bottom grid displays the details of the purchase order highlighted in the top grid.



Google Maps is launched with the selected address when you click on the right-arrow icon:



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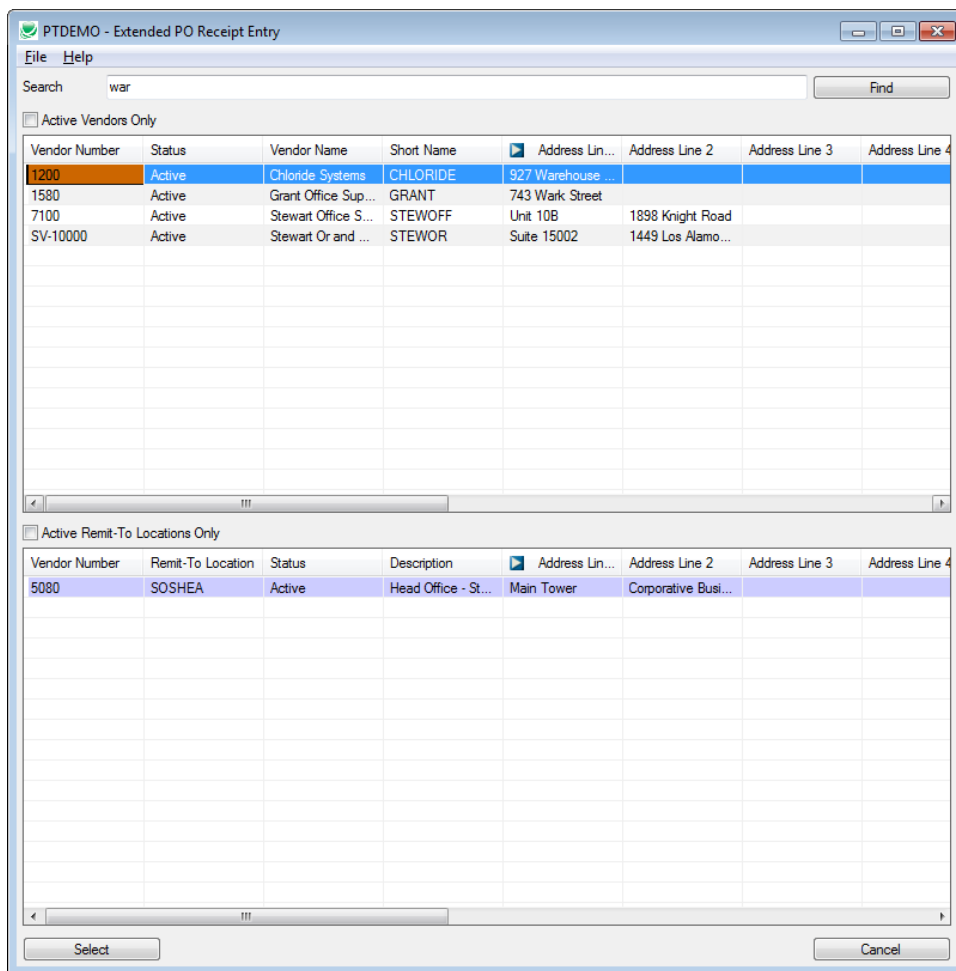
SmartFinder (Vendors)

The SmartFinder is launched from the Vendor Number button.

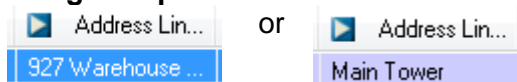
Searching: Enter a few word fragments in the entry field and the vendor and remit-to location tables will be searched. Many fields will be searched simultaneously. All of the word fragments must be present in one of the fields being searched.

Display: The top grid displays matches in the vendor table. The bottom grid displays matches in the remit-to location table.

Selection: Selecting from the top grid will enter the vendor number into the standard form. Selecting from the bottom grid will enter both the vendor number and the remit-to location into the standard form.



Google Maps is launched with the selected address when you click on the right-arrow icon:



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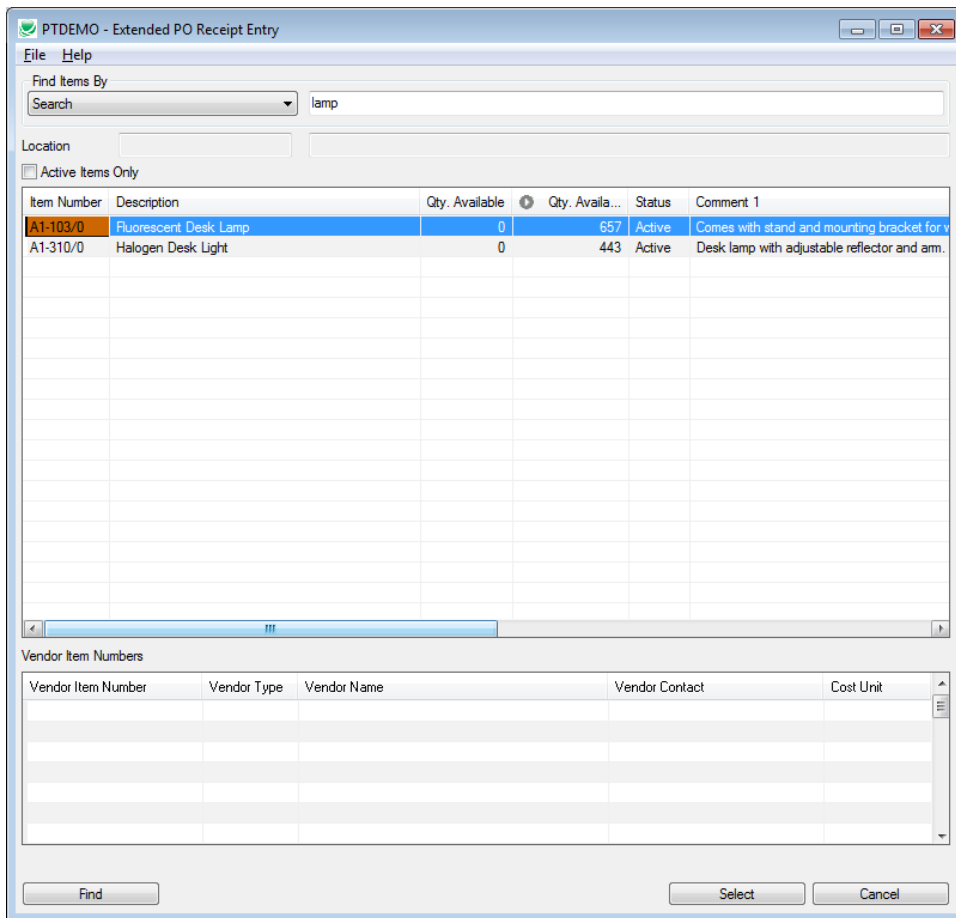
SmartFinder (Items)

The SmartFinder is launched from the Item Finder button.

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

Display: When you click on a row in the top grid, the bottom grid will display all of the vendor item numbers that are in use by that item.

Selection: Selecting from the top grid will enter the item number into the standard form. Selecting from the bottom grid will enter both the item number and the vendor item number into the standard form.



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Quantities Display

Item quantities for the selected location and item are shown at the bottom of the standard PO entry window. Drill-down links are provided. Note that this is for the single location displayed in the grid. The Item Quantities feature enables the display of item quantities for multiple locations.

The screenshot shows the PTDEMO - Extended PO Receipt Entry window. The main form contains fields for Receipt Number (RCP00000085), Vendor Number (1400), and various other details like Receipt Date (02/05/2020) and Posting Date (02/05/2020). Below the form is a table with the following data:

Lin...	Completes PO	Item Number	Item Description	Location	Drop-Ship	Quantity Received	Unit of Measure
1	No	A1-753/B	Paper Clip Dispenser - Ki...	2	No	10	Ea.

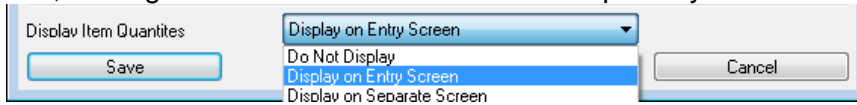
At the bottom of the window, there is a summary table for quantities, which is highlighted with a red box in the image:

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	10	0	0	0	10
All Locations (Ea.)	69	0	0	0	69

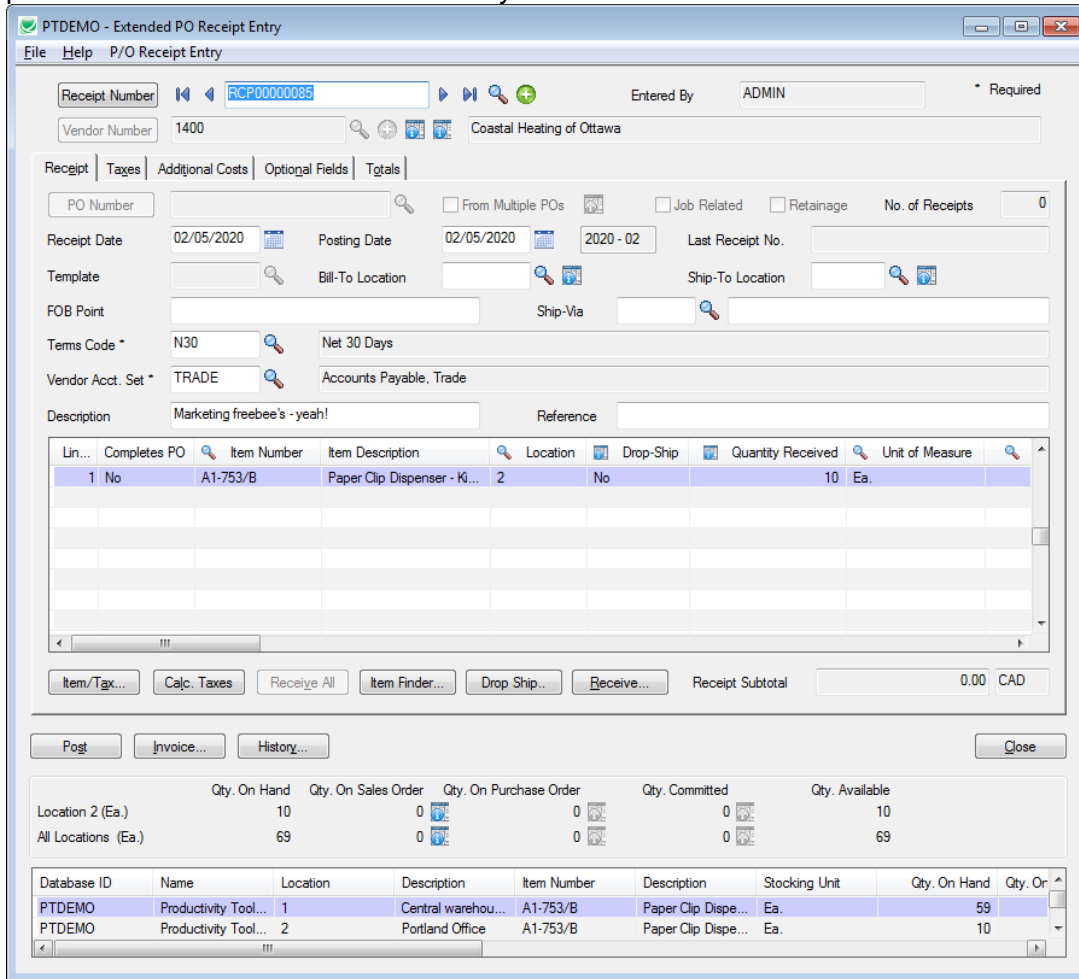
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Item Quantities

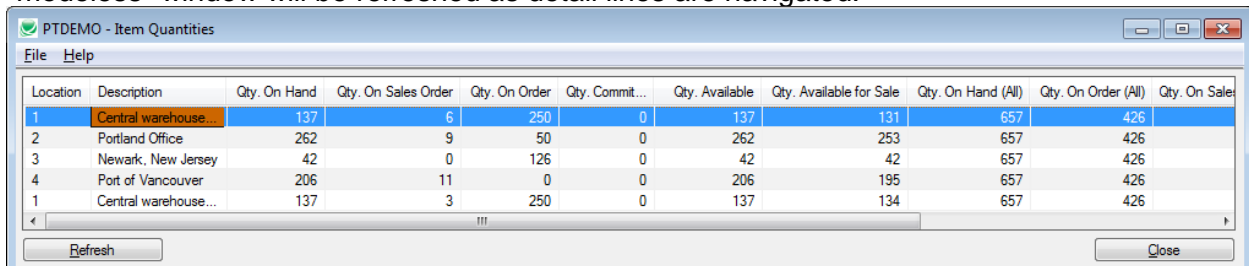
The Item Quantities feature will display quantities available at other locations, including in other companies while entering an order. Three settings control this feature and are available from the File, Settings menu in the Extended PO Receipt Entry window:



The Display on Entry Screen choice will cause a scrolling area showing 2 lines at a time to be placed at the bottom of the Order Entry window as shown here:



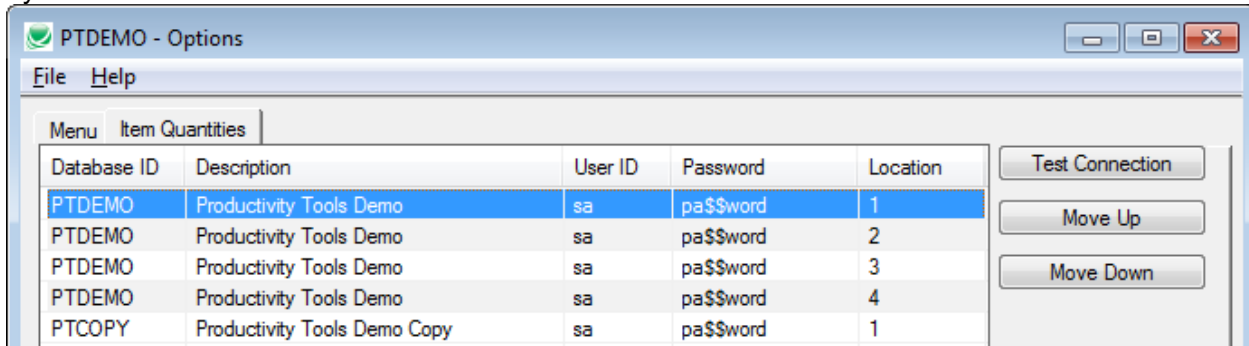
The Display on Separate Screen choice will show quantities in a separate window. This "modeless" window will be refreshed as detail lines are navigated.



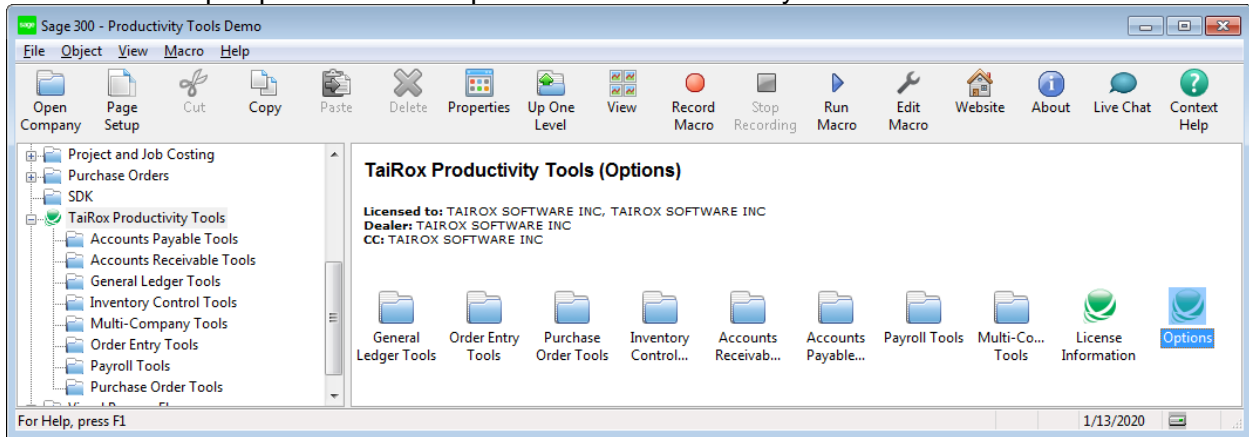
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Item Quantities

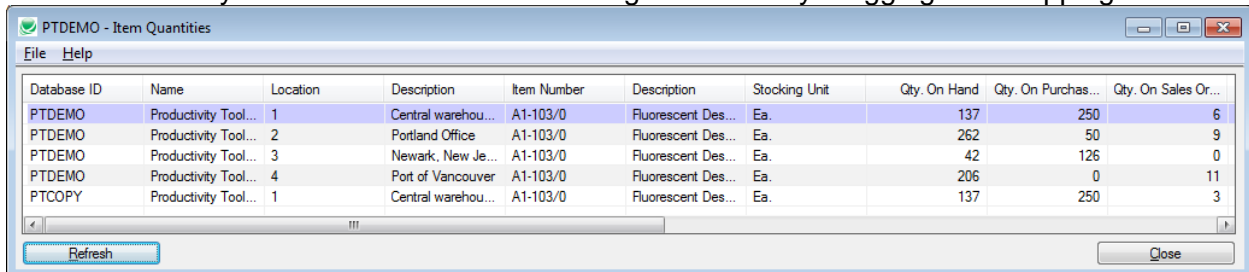
An administrator will set up the Sage 300 company databases and locations that are displayed by Item Quantities:



Access to set up is provided from top level of the Productivity Tools menu:



The default Item Quantity display will show many columns that will be hidden in most situations. For example, the Database ID and Name would be hidden if all locations are in the same Sage 300 company. For example, the Item Description and Stocking Unit for an item would be hidden if these are always the same. Hide and re-arrange columns by dragging and dropping.



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Drop Ship

The Drop Ship pop up window is shown here. The top portion is the same as in the standard form. The bottom grid show detail lines. Pick a shipment address and then select which lines are to be drop shipped to that address by using the Include column. Clicking on Drop Ship will then update the main PO entry window and allow you to drop-ship other lines to a different shipment address. Press Cancel when done to return to the main PO entry window.

The screenshot shows a window titled "PTDEMO - Drop Ship" with a menu bar containing "File" and "Help". Below the menu bar is a section for setting the drop shipment address, including a dropdown menu set to "Customer Address" and a "Customer Number" field with the value "1200".

The main form area contains several fields for address and contact information:

- Description: Mr. Ronald Black
- Address: 2820 Wabash Road
- City: Los Angeles
- State: CA
- Zip/Postal Code: 90048
- Country: USA
- Phone Number: (213) 555-0274
- Fax Number: (213) 555-7234
- Location E-mail: (empty)
- Contact: Mr. Black
- Contact Phone: () -
- Contact Fax: () -
- Contact E-mail: ronaldblack99@hotmail.com

At the bottom of the form is a table with the following data:

Include	Line ...	Item Number	Item Description	Location	Drop-Ship	Ordered Quantity ...
No	1	A1-753/B	Paper Clip Dispenser - K...	2	No	0

At the bottom of the window are four buttons: "Select All", "Select None", "Drop Ship", and "Cancel".

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Quick PJC Entry

When entering Sage 300 Project and Job Costing entries in a PO and when multiple lines use the same selections for Contract, Project and Category, Extended PO Receipt Entry will default inserted lines to the previous entry's selections to speed up data entry. The following form shows how the order form appears immediately after pressing the Insert key:

PTDEMO - Extended PO Receipt Entry

File Help P/O Receipt Entry

Receipt Number: NEW Entered By: * Required

Vendor Number: 1200 Chloride Systems

Receipt | Taxes | Additional Costs | Optional Fields | Rates | Totals

PO Number: From Multiple POs: Job Related: Retainage: No. of Receipts: 0

Receipt Date: 01/13/2020 Posting Date: 01/13/2020 2020 - 01 Last Receipt No.:

Template: Bill-To Location: Ship-To Location:

FOB Point: Ship-Via:

Terms Code * : DUETBL Due by Invoice Date:

Vendor Acct. Set * : USA Accounts payable, Other:

Description: Reference:

Lin...	Completes PO	Contract	Project	Category	Cost Class	Item Number	Item Description
1	No	120-1200-10	1001	MGTLABOR	Labor	100010	Cervantez, Freddy Daniel
2	No	120-1200-10	1001	MGTLABOR	Labor		

Item/Tax... Calc. Taxes Receive All Item Finder... Drop Ship... Receive... Receipt Subtotal: 0.00 USD

Post Invoice... History... Close

Location	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0

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Receive in Sorted Order

Receive in Sorted Order functionality is most useful when a large PO is being received and the packing slip is not sorted by PO line number.

When the Receive button is pressed a window pops up that displays items in a number of different orders. Three levels of sort order are provided. Received items can be entered on this form using a time-saving “enter-tab-enter-tab-...” sequence.

When launched, Extended PO Receipt Entry displays a receipt entry screen with additional buttons, including “Receive”.

PTDEMO - Extended PO Receipt Entry

File Help P/O Receipt Entry

Receipt Number RCP00000085 Entered By ADMIN * Required

Vendor Number 1400 Coastal Heating of Ottawa

Receipt Taxes Additional Costs Optional Fields Totals

PO Number From Multiple POs Job Related Retainage No. of Receipts 0

Receipt Date 02/05/2020 Posting Date 02/05/2020 2020 - 02 Last Receipt No.

Template Bill-To Location Ship-To Location

FOB Point Ship-Via

Terms Code * N30 Net 30 Days

Vendor Acct. Set * TRADE Accounts Payable, Trade

Description Marketing freebee's - yeah! Reference

Lin...	Completes PO	Item Number	Item Description	Location	Drop-Ship	Quantity Received	Unit of Measure
1	No	A1-753/B	Paper Clip Dispenser - K...	2	No	10	Ea.

Item/Tax... Calc. Taxes Receive All Item Finder... Drop Ship... Receive... Receipt Subtotal 0.00 CAD

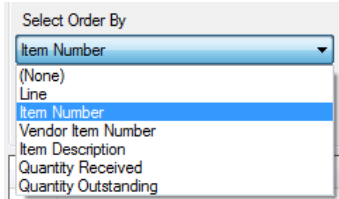
Post Invoice... History... Close

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	10	0	0	0	10
All Locations (Ea.)	69	0	0	0	69

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Receive in Sorted Order

When the Receive button is pressed a window pops up that displays items in a number of different orders. Three levels of sort order are provided. The grid is cleared when you change the sort order, click on Load to redisplay the items in the new order.



Data can be entered on only one column of the grid: Quantity Received. This enables you to enter the received entries quickly (“enter-tab-enter-tab-...”).

A screenshot of the "PTDEMO - Receive" window. The window has a menu bar with "File" and "Help". Below the menu bar, there is a section for "Order By" with three dropdown menus: "Select Order By" (set to "Item Number"), "Received to Date" (set to "(None)"), and another dropdown menu (set to "(None)"). A "Load" button is located to the right of these dropdowns. Below this section is a data grid with the following columns: "Line", "Item Number", "Item Description", "Vendor Item Number", "Location", "Quantity Received", "Unit of Measure", "Received to Date", and "Quantity Outstanding". The grid contains two rows of data:

Line	Item Number	Item Description	Vendor Item Number	Location	Quantity Received	Unit of Measure	Received to Date	Quantity Outstanding
2	A1-103/0	Fluorescent Desk Lamp		2	5	Ea.	0	0
1	A1-753/B	Paper Clip Dispenser ...		2	10	Ea.	0	0

Below the grid is a summary section with the following columns: "Qty. On Hand", "Qty. On Sales Order", "Qty. On Purchase Order", "Qty. Committed", and "Qty. Available". The summary data is as follows:

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	262	9	50	0	262
All Locations (Ea.)	657	25	426	0	657

A "Close" button is located at the bottom right of the window.

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Receive in Sorted Order

Note: If you change the quantity received for an item with a serial number, the Sage 300 logic will kick-in and you may see pop-up Sage 300 windows like the following, which are dealt with using standard Sage 300 techniques.

Serial Number	

Unit of Measure	Ea.	
Serial Nos. Required		1
Generated		0
Remaining		1

Once the Receive window is closed, the Quantity Received numbers in the PO Receipt form will be updated.