

Extended Remit-To Location

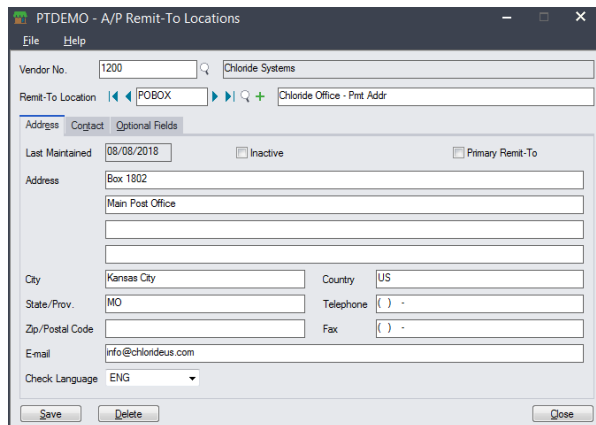
Extended Remit-To Location is an enhanced replacement for the Sage A/P Remit-To Locations form. It provides you with more features while adding or editing a remit-to location and fast access to vendor information.

Extended Remit-To Location window lets you:

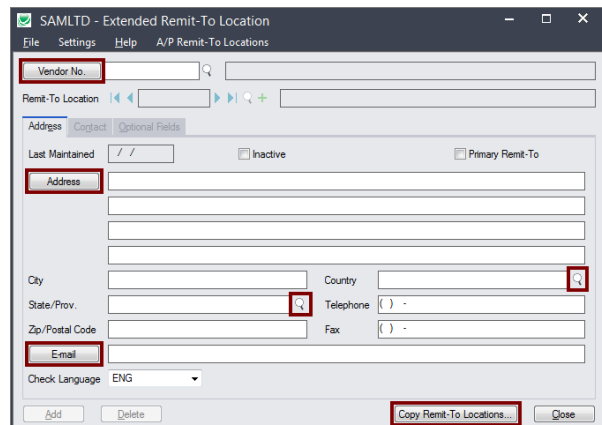
- Use a “SmartFinder” to look up vendors and existing remit-to addresses.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes. This option also provides Finders for looking up country, state and province codes.
- Display vendor addresses in Google maps.
- Create new emails for the Vendor and Contact email addresses.
- Maintain remit-to locations for vendors across multiple Sage 300 companies using the Copy Remit-To Locations functionality.

The following pictures show the extra buttons on the Extended Remit-To Location screen:

Sage A/P Remit-To Locations screen

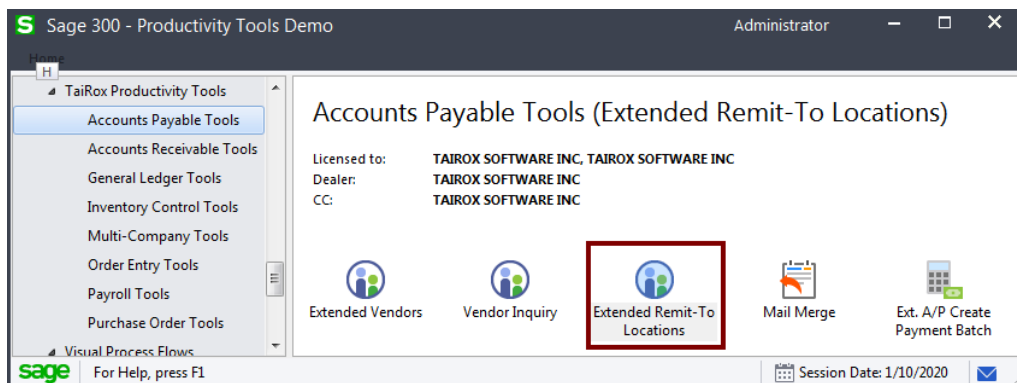


TaiRox Extended Remit-To Location screen

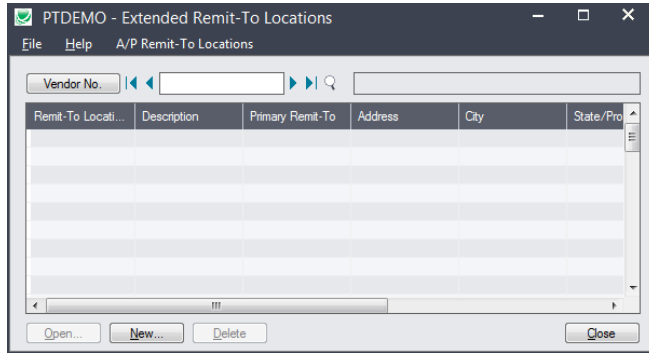


Using Extended Remit-To Location

You get to the Extended Remit-To Location window by first opening Extended Remit-To Locations under **TaiRox Productivity Tools > Accounts Payable Tools** on the Sage 300 desktop.



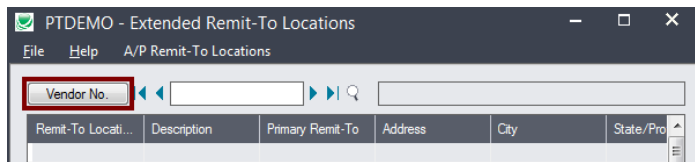
- The Extended Remit-To Locations window appears as follows:



- Click the New button to add a new remit-to location.
- Click the Vendor No. button to select a vendor using the SmartFinder and display existing remit-to locations.
 - Double-click a remit-to location to edit the existing information, or click New to a add a new location.

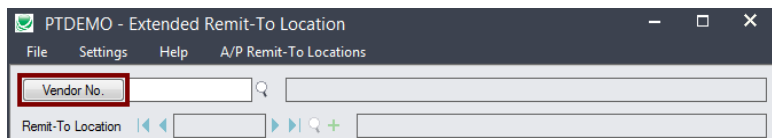
Look up vendors and remit-to addresses using the Vendor Number SmartFinder

- Click the Vendor No. button at the top of the Extended Remit-To Locations form.



Or

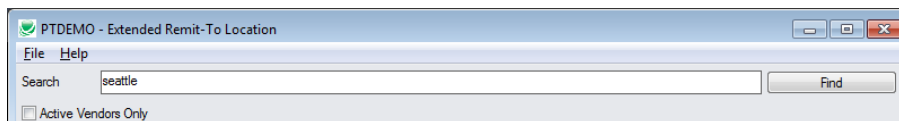
- Click the New button on the Extended Remit-To Locations form.
- Then click the Vendor No. button at the top of the Extended Remit-To Location form.



The SmartFinder search form will appear for vendors and remit-to locations.

How to use Search:

- Enter one or more words or word fragments in the search entry field to search multiple tables and fields.



- You can also filter for Active vendors.
- Search returns vendors and remit-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 "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 a vendor where "Ross" is in the Vendor Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

What's displayed in the Search form:

- The top grid displays the vendors matching the search criteria.
- The bottom grid displays the remit-to locations that match the search criteria.

Note that the remit-to locations *may not* be related to the vendor records displayed in the top part of the screen. The screen below displays remit-to locations for two different vendors.

- Click the Address Line 1 column heading or double-click the address to launch **Google Maps** with the vendor address.

| Vendor Number | Status | Vendor Name | Short Name | Address Line 1 | Address Line 2 | Address Line 3 | Address Line 4 |
|---------------|--------|------------------|------------|-----------------|----------------|----------------|----------------|
| 6010 | Active | J. D. Garner Ent | J. D. Garn | 5509 Commercial | | | |

| Vendor Number | Remit-To Locati... | Status | Description | Address Line 1 | Address Line 2 | Address Line 3 | Address Line 4 |
|---------------|--------------------|--------|----------------|----------------|----------------|----------------|----------------|
| 1200 | SEATAC | Active | Seattle Tacoma | PO Box 13233 | Tacoma Bay | | |
| 6010 | SEATAC | Active | Seattle Tacoma | PO Box 13790 | Tacoma Bay | | |

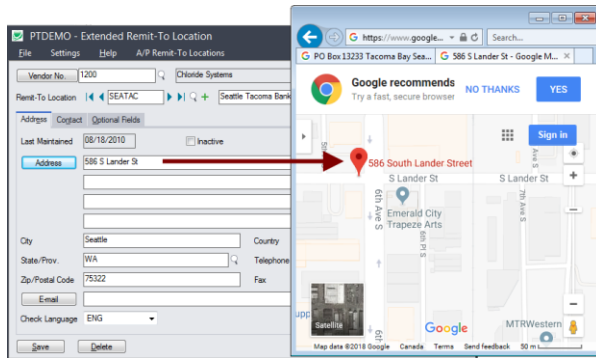
- Double-click email addresses (such as the Contact E-mail) to create new emails.

How to select:

- Double-click a vendor in the top grid to select and enter the vendor on the Extended Remit-To Location form.
- Double-click a remit-to location in the bottom grid to enter the vendor (and remit-to address if looking up the location on the Extended Remit-To Location form).

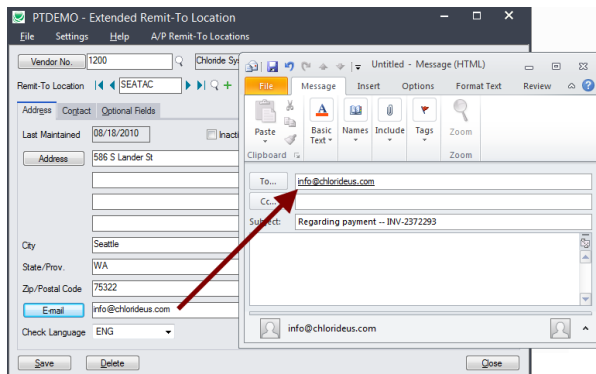
Look up addresses in Google Maps

- Click the Address button on the Extended Remit-To Location screen to confirm the address.



Launch emails for vendors and vendor contact email addresses

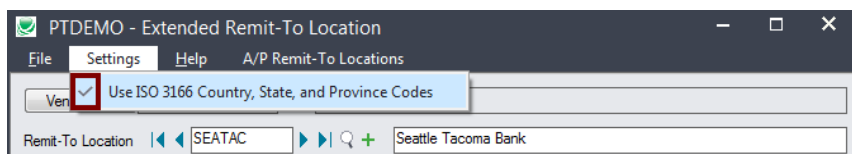
- Click the E-mail button on the Address or Contact tabs to quickly create a new email.



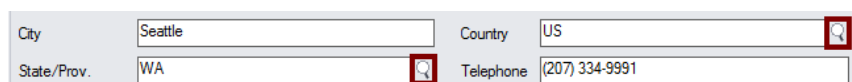
Enforce ISO 3166 country codes

Use this option to force country, state and province codes to match ISO 3166 codes, and to use Finders to select country, state, and province codes. (Useful if your Sage 300 addresses are feeding into shipping software.)

- This setting can only be changed by the Sage 300 ADMIN.
- Choose Settings from the Extended Remit-To Location menu.



- If you want to use this option, make sure it displays the checkmark.
- The program will also display new Finder buttons to let you select ISO country, state, and province codes from Finder lists.



- An error message will appear when you click Save if the codes are not valid. You must fix them before you can save the remit-to location record.

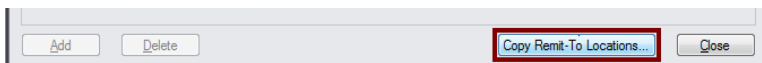
Copy Remit-To Locations to other Sage 300 companies

IMPORTANT:

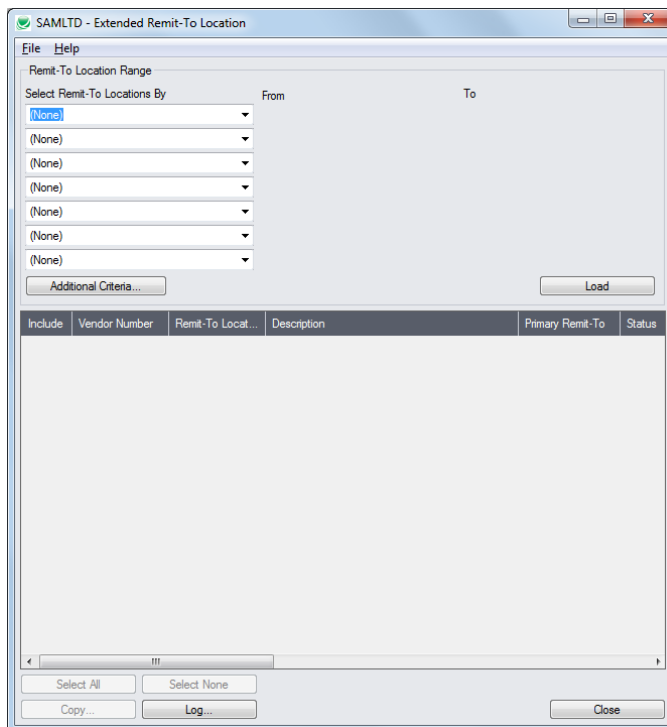
You must enter a User ID and Password to copy remit-to locations. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new remit-to locations in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the remit-to locations that you want to copy.
 - Copy Remit-To Locations operates from within an existing "source" company, and lets you copy remit-to information to other Sage 300 company databases.
- Open the Extended Remit-To Location form, and click the Copy Remit-To Locations button at the bottom of the screen.



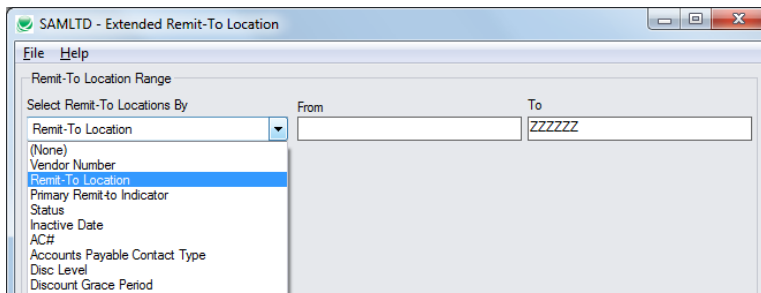
When you click the Copy Remit-To Locations button, a window will pop up for selecting the remit-to locations in the source company.



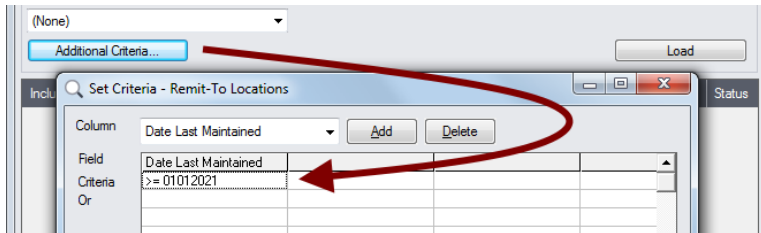
Note: By default, the grid at the bottom of the form will display any new remit-to locations that were added in this session. This allows you to bypass the selection process and copy these new remit-to locations directly to other Sage company databases.

Specify a range of remit-to locations for copying:

You can specify ranges for up to seven remit-to location fields to use for location selection – including the vendor number, remit-to location code, primary remit-to indicator, status, inactive date, or any of the optional fields that you use for remit-to locations.

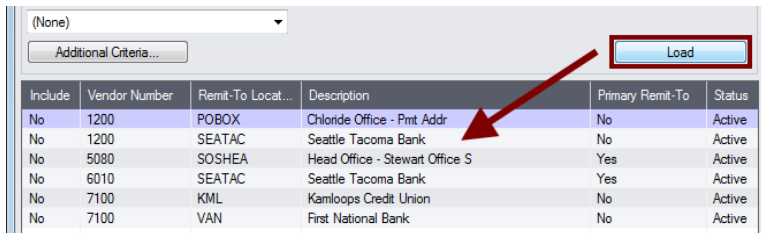


Choose additional criteria:



- Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting locations that were last maintained after Jan 1, 2021. Click OK to save.

Load the list of locations and choose which ones to copy:



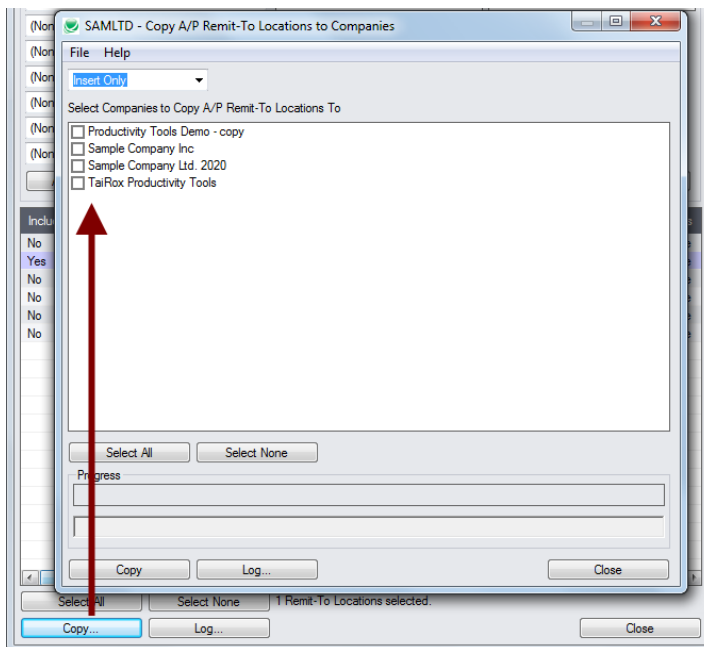
- Click the Load button to display the list of remit-to locations.
When the Load button is pressed, the program will display the remit-to locations in the range and with the additional criteria you specified.
 - You can adjust the remit-to location range or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the remit-to locations loaded in the grid.



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

| Include | Vendor Number | Remit-To Locat... | Description | Primary Remit-To | Status |
|---------|---------------|-------------------|--------------------------------|------------------|--------|
| No | 1200 | POBOX | Chloride Office - Pmt Addr | No | Active |
| Yes | 1200 | SEATAC | Seattle Tacoma Bank | No | Active |
| No | 5080 | SOSHEA | Head Office - Stewart Office S | Yes | Active |
| No | 6010 | SEATAC | Seattle Tacoma Bank | Yes | Active |
| No | 7100 | KML | Kamloops Credit Union | No | Active |
| No | 7100 | VAN | First National Bank | No | Active |

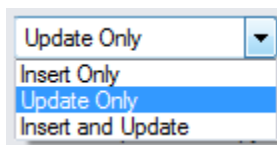
Click the Copy button to display the “To Companies” screen:



Select whether to insert new codes or update existing ones in target companies:

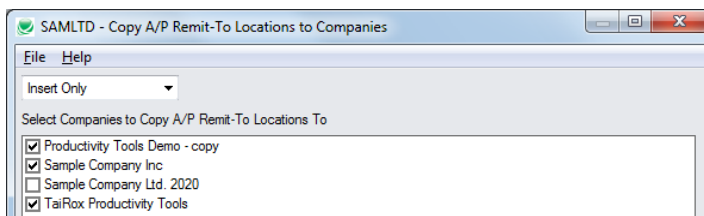
Before proceeding, you must decide whether to add or update locations in the target companies.

For example, choose Update Only to update information for all existing remit-to locations in the target companies – but add no new codes.



- Choose whether to insert, insert and update, or just update remit-to locations.
 - Insert Only will only add codes if the code does not already exist.
 - Update Only will only update codes that already exist.
 - Insert and Update will perform both of these operations.

Select target Sage 300 companies:

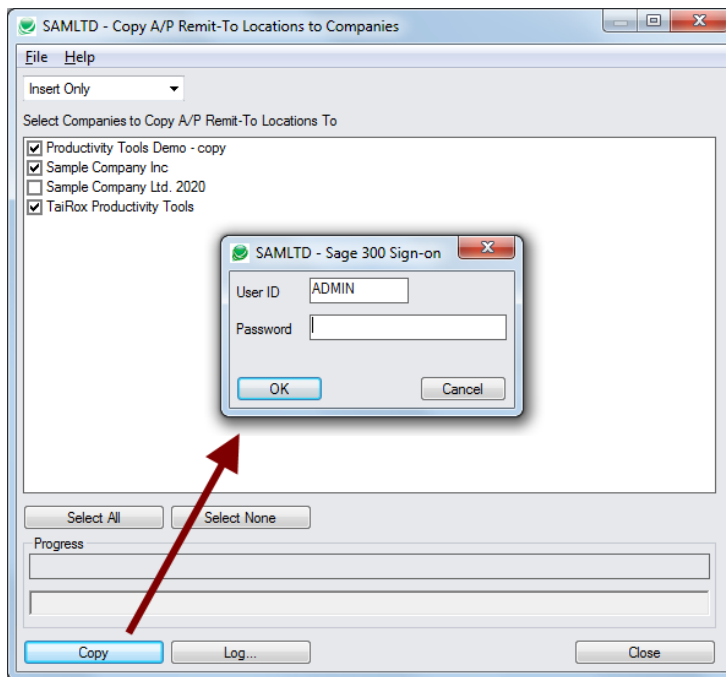


- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy remit-to locations:



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

Note: You MUST have sufficient permissions to update remit-to locations in the target companies for copying to proceed.
- The program will copy the remit-to locations to the target companies.
- If no changes are required for a selected location, the record will not be updated – so the audit stamp will be preserved.

Click the Log button to confirm which remit-to locations were processed:

```

4/14/2021 4:07:37 PM Copy A/P Remit-To Locations to Companies started.
4/14/2021 4:07:37 PM
4/14/2021 4:07:37 PM Performed by user: ADMIN
4/14/2021 4:07:37 PM
4/14/2021 4:07:37 PM Insert Only
4/14/2021 4:07:37 PM Copy A/P Remit-To Locations to Companies: Productivity Tools Demo - copy
4/14/2021 4:07:37 PM                                     Sample Company Inc
4/14/2021 4:07:37 PM                                     TaiRox Productivity Tools
4/14/2021 4:07:37 PM
4/14/2021 4:07:37 PM Copying remit-to locations from Sample Company Limited to Productivity
Tools Demo - copy started.
4/14/2021 4:07:37 PM     Logging in to Productivity Tools Demo - copy...
4/14/2021 4:07:37 PM     Remit-To location 1200-SEATAC already exists. Remit-To location not
inserted.
4/14/2021 4:07:37 PM     Logging off of Productivity Tools Demo - copy...
4/14/2021 4:07:37 PM
4/14/2021 4:07:37 PM     There was 1 remit-to location not inserted.
4/14/2021 4:07:37 PM Copying remit-to locations from Sample Company Limited to Productivity
Tools Demo - copy complete.
=====
    
```

The Log lists:

- The user and the type of operation performed.
- Each remit-to location that was processed and whether the records were updated.