

Extended Ship-To Location

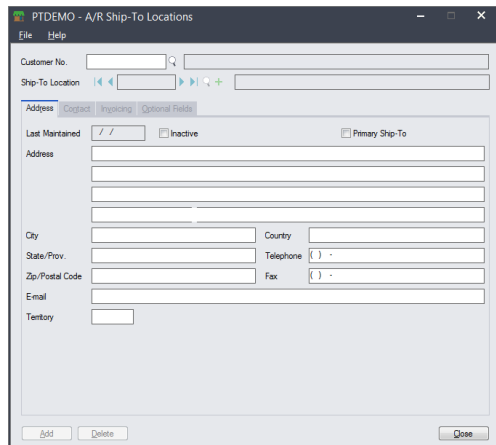
Extended Ship-To Location is an enhanced replacement for the Sage A/R Ship-To Locations form. It provides you with more features while adding or editing a ship-to location and fast access to customer information.

The Extended Ship-To Location window lets you:

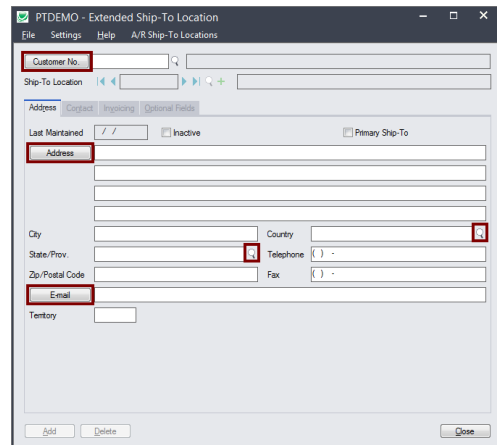
- Use a “SmartFinder” to look up customers and existing ship-to addresses.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes. This option also provides Finders for looking up country, state and province codes.
- Display customer addresses in Google maps.
- Create new emails for the Customer and Contact email addresses.

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

Sage A/R Ship-To Locations screen

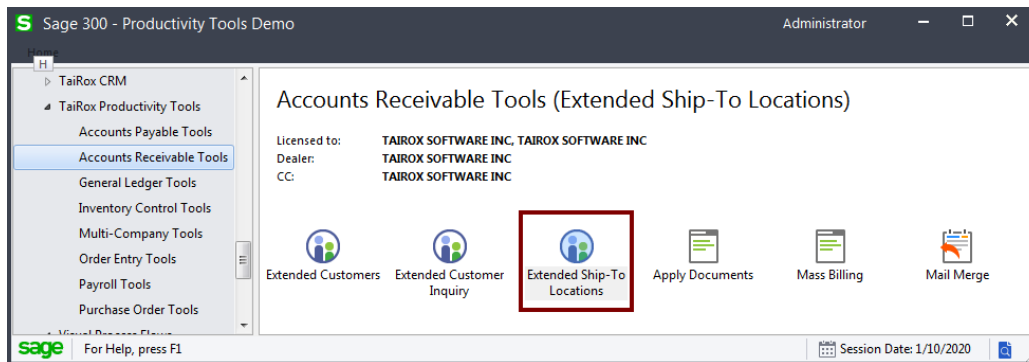


TaiRox Extended Ship-To Location screen

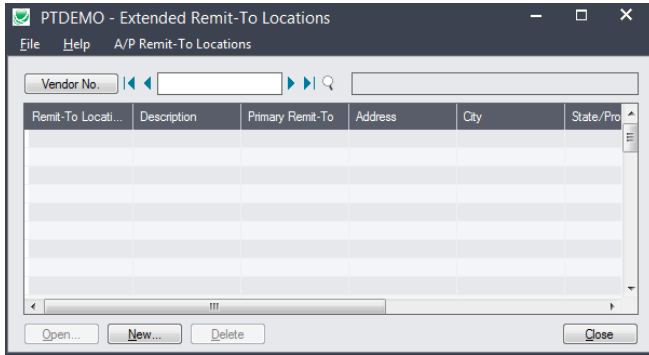


Using Extended Ship-To Location

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



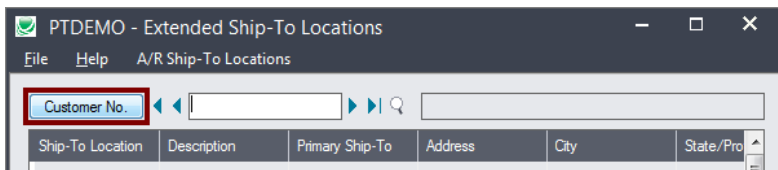
- The Extended Ship-To Locations window appears as follows:



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

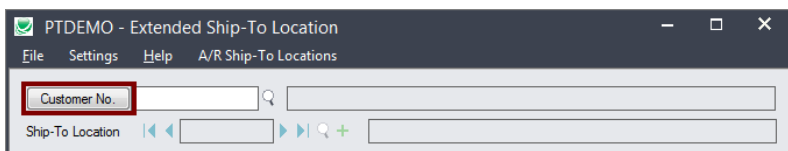
Look up customers and ship-to addresses using the Customer Number SmartFinder

- Click the Customer No. button at the top of the Extended Ship-To Locations form.



Or

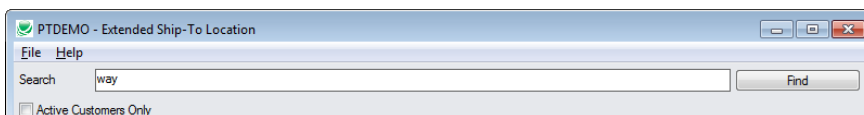
- Click the New button on the Extended Ship-To Locations form.
- Then click the Customer No. button at the top of the Extended Ship-To Location form.



The SmartFinder search form will appear for customers and ship-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 customers.
- 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 “way” 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 customer where "Ross" is in the Customer Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the customer address) are treated as a single field.

What's displayed in the Search form:

- The top grid displays the customers matching the search criteria.
- The bottom grid displays the ship-to locations that match the search criteria. You can also filter by Active Ship-To Locations.

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

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

The screenshot shows a software window titled "PTDEMO - Extended Ship-To Location". At the top, there is a search bar containing the text "way" and a "Find" button. Below the search bar are two data grids. The top grid is titled "Active Customers Only" and has columns: Customer Number, Status, Customer Name, Short Name, Address Line 1, Address Line 2, Address Line 3, and Address Line 4. The bottom grid is titled "Active Ship-To Locations Only" and has columns: Customer Number, Ship-To Location, Status, Description, Address Line 1, Address Line 2, Address Line 3, and Address Line 4. In both grids, the "Address Line 1" column header and the first row of data are highlighted with a red box. At the bottom of the window, there are "Select" and "Cancel" buttons.

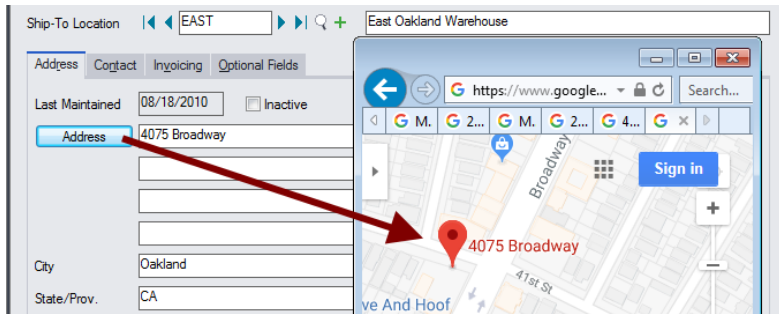
- Double-click email addresses (such as the Contact E-mail) to create new emails.

How to select:

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

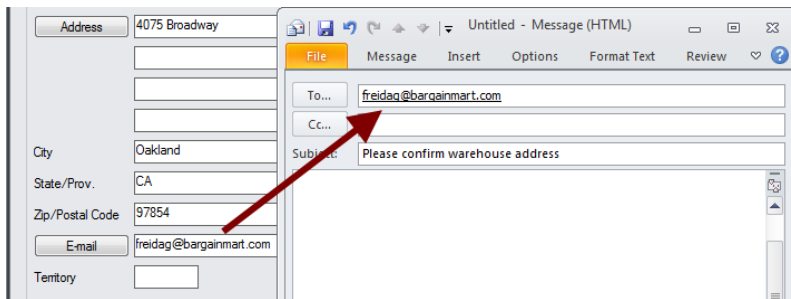
Look up addresses in Google Maps

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



Launch emails for customers and customer contact email addresses

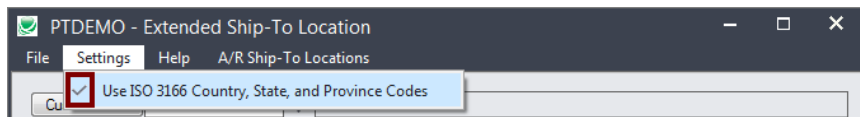
- Click the E-mail button on the Address or Contact tabs to quickly create a new email.



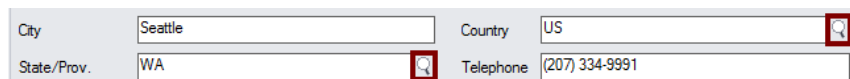
Enforce ISO 3166 country codes

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 Ship-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 ship-to location record.