

TaiRox Productivity Tools - Extended Shipment Entry User Guide

[SmartFinder \(Shipments\)](#) Find shipments quickly for a customer.

[SmartFinder \(Customers\)](#) Find a customer quickly from a phone number or address.

[SmartFinder \(Items\)](#) Find an item quickly from partial words. Show additional item columns such as price, quantity and comments.

[Ship by Picking Sequence](#) Enter quantities picked for a large number of items in picking sequence order.

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

[Print Picking Slips Fast](#) 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.

[Margin and Recent Cost Columns](#) Add 4 margin and markup columns to the item display grid. Click on a button to display margin and markup for the whole order.

TaiRox Productivity Tools - Extended Shipment Entry User Guide

SmartFinder (Shipments)

SmartFinder will search multiple columns in multiple tables and display all matches - just like a modern search engine. Click on the Shipment Number button as shown:

The screenshot shows the 'PTDEMO - Extended Shipment Entry' application window. The 'Shipment Number' button is highlighted with a red box. The interface includes various input fields and buttons for managing shipment data.

Buttons: Shipment Number, Customer No., Invoice Number, Complete Status, Entered By, Order Number, From Multiple Orders, PO Number, Template Code, Shipment Date, Posting Date, Year/Period, Location, Central warehouse - Seattle, Exp. Ship Date, No. of Shipments, Ship-To Location, Job Related, Project Invoicing, Retainage, Calculate Tax, Create Invoice, Description, Reference, Item/Tax..., Components..., Item Finder..., Ship..., Shipment Subtotal, Post, History..., Prepayment..., O/E Forms..., Close.

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Shipped

	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

Shipment Subtotal: 0.00 USD

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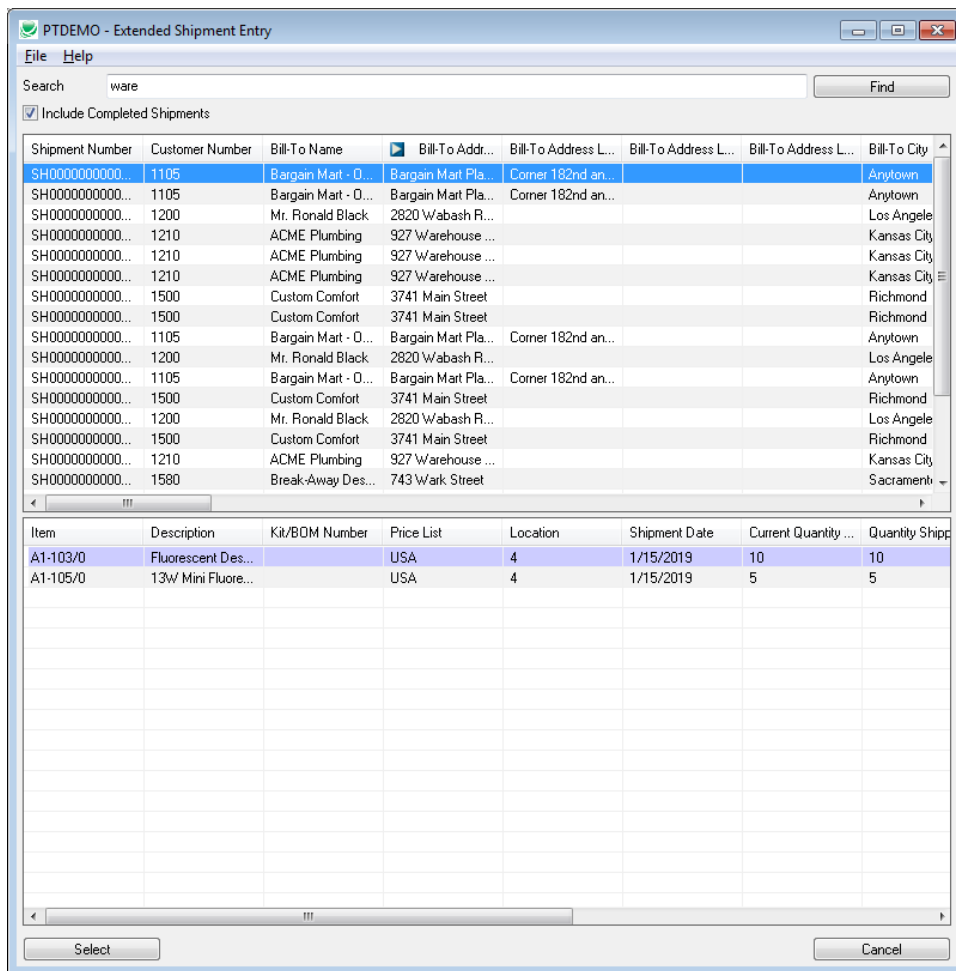
SmartFinder (Shipments)

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.

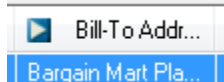
Display: The top grid displays matches in the matching shipments. The bottom grid displays the details of the shipment highlighted in the top grid.

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 entries "(451) 555-8991" as well as "(408) 451-8991".



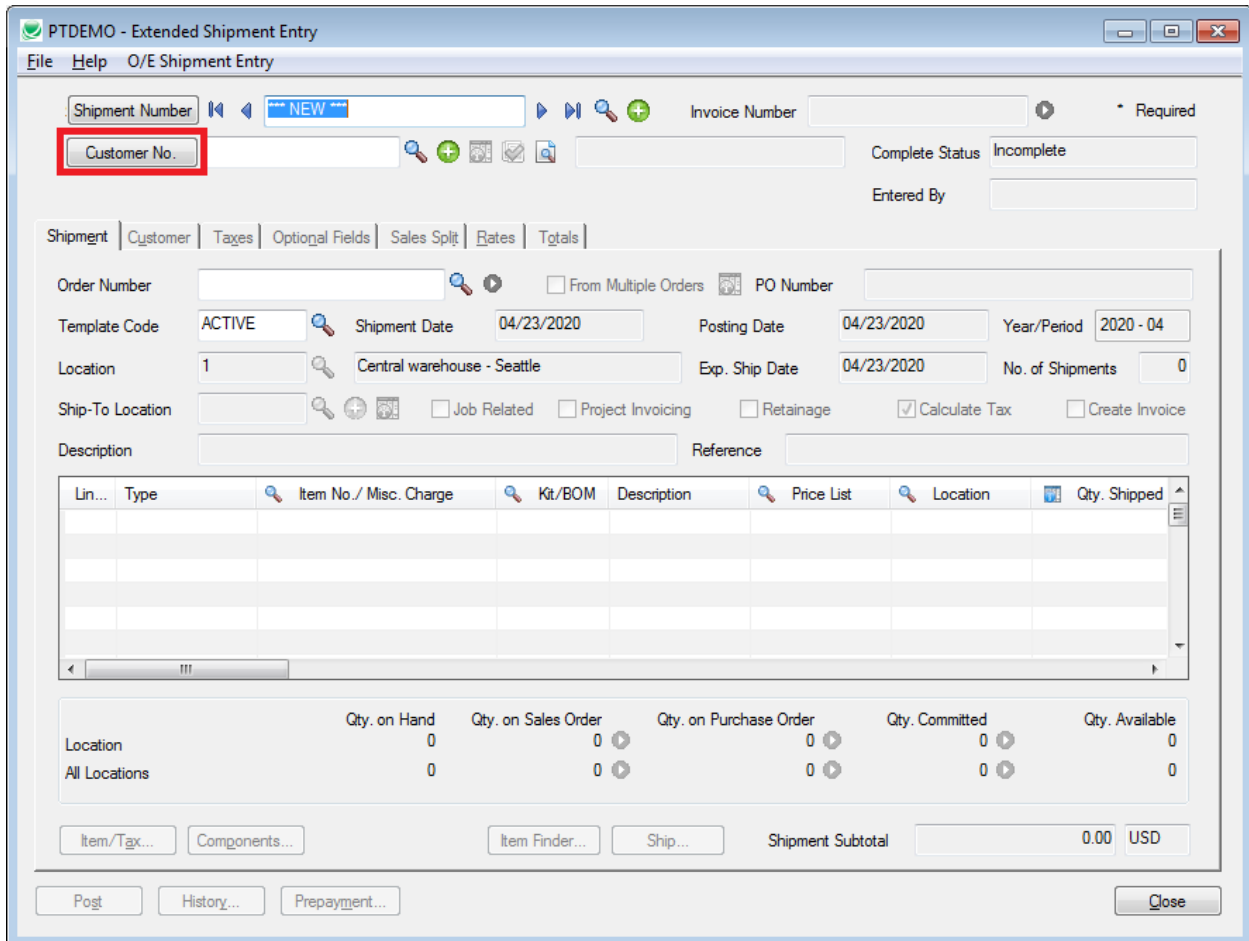
Google Maps is launched with the selected address when you click on the right-arrow icon:



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SmartFinder (Customers)

SmartFinder will search multiple columns in both customer and ship-to tables and display all matches - just like a modern search engine. Click on the Customer No. button as shown:



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SmartFinder (Customers)

The SmartFinder form pops-up. Suppose you remember that this customer has something to do with a warehouse. Enter "ware" and click on the Find button. A/R customer rows are shown in the top grid and A/R shipment locations are shown on the bottom grid. You can see that many columns in the database tables are searched simultaneously.

Select a row in the customer grid and that customer will be selected and you will be returned to the main entry form. Select a row in the ship-to grid and that customer and that ship-to location will be selected and you will be returned to the main entry form.

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 entries "(451) 555-8991" as well as "(408) 451-8991".

Customer Number	Status	Customer Name	Short Name	Address Lin...	Address Line 2	Address Line 3	Address Line 4
1210	Active	ACME Plumbing	ACME	927 Warehouse ...			

Customer Number	Ship-To Location	Status	Description	Address Lin...	Address Line 2	Address Line 3	Address Line 4
1105	EAST	Active	East Oakland W...	1045 Middle Str...			
1105	WEST	Active	West Oakland ...	1819 La Jean R...			
1200	WAREHS	Active	Warehouse	Receiving Dock...	Wabash Industri...		
1210	A	Active	Receiving Dock A	ACME Receivin...	927 Warehouse ...		
1210	B	Active	Receiving Dock B	ACME Receivin...	927 Warehouse ...		
1210	C	Active	Receiving Dock C	ACME Receivin...	927 Warehouse ...		
1500	MID	Active	Mid-way wareho...	#2211 Mid-way ...	150 Tasmanian ...		
1500	YAM	Active	Yamate Wareho...	#3388 Yamate ...	3741A Main Street		
1580	EAST	Active	Break Away - Ea...	1802 West Boul...			
1580	WEST	Active	Break Away - W...	9754 Nigel Road			

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

▶ Address Lin... OR ▶ Address Lin...

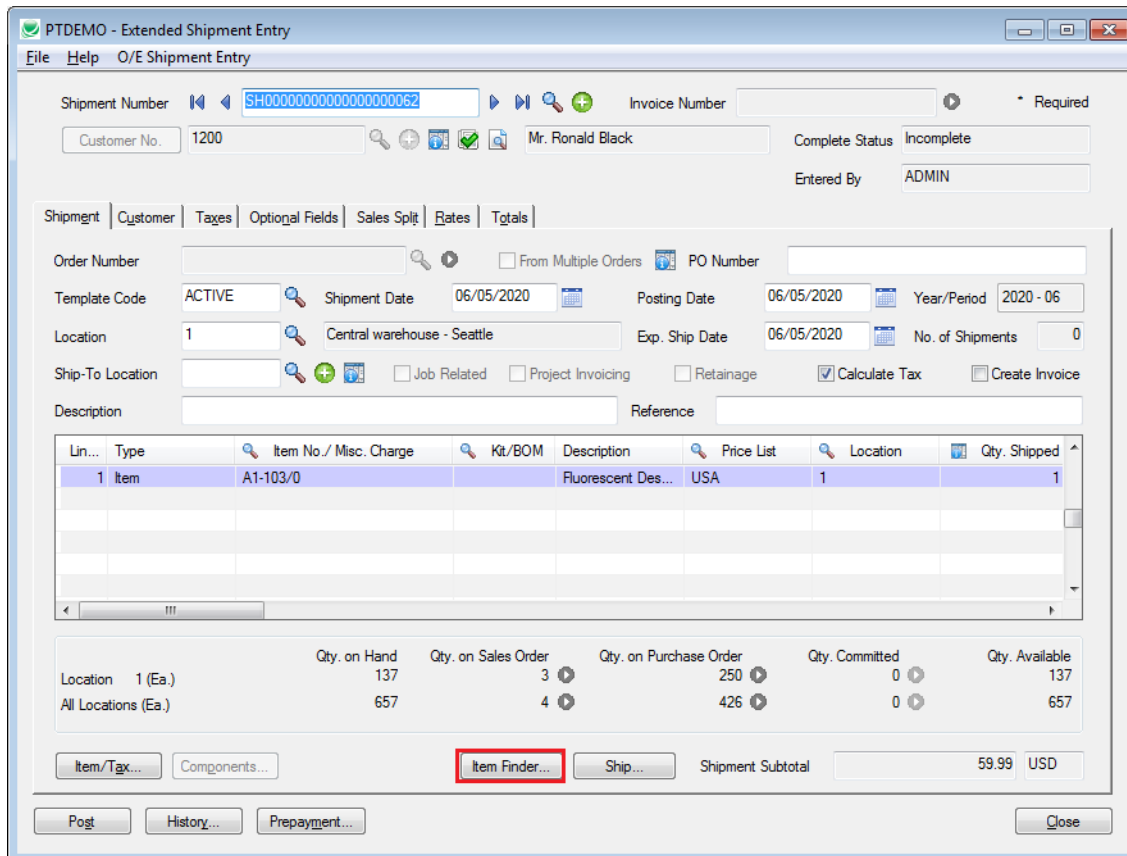
927 Warehouse ... 1045 Middle Str...

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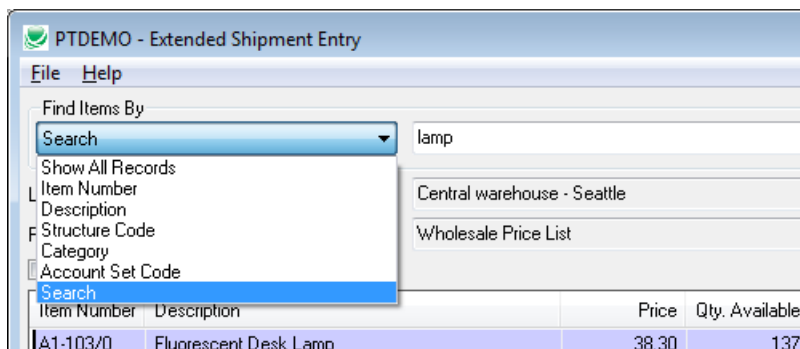
SmartFinder (Items)

The Item Finder provides a selection grid with columns such as price, quantity (current location), quantity (all locations) and comments. It is often desirable to select between similar items based on these columns. The normal finder columns are also displayed. The price is the quantity zero price for that customer. Selecting an item inserts a new row into the shipment entry grid. Columns are added or hidden as determined by user editable settings (File, Settings). Finder columns are added or hidden as determined by user editable settings (File, Settings).

The Item Finder is launched by clicking on the Item Finder button:



There are several search options available. The default option "Search" is a SmartFinder.



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SmartFinder (Items)

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 customer 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 customer item number into the standard form.

The screenshot shows the PTDEMO - Extended Shipment Entry application window. The search criteria are: Find Items By: Search, lamp. Location: 1, Central warehouse - Seattle. Price List: USA, US Price List. The search results table is as follows:

Item Number	Description	Price	Qty. Available	Qty. Available (All)	Status	Comment 1
A1-103/0	Fluorescent Desk Lamp	59.99	137	657	Active	Comes with stand and moun
A1-310/0	Halogen Desk Light	50.35	128	443	Active	Desk lamp with adjustable re

Below the search results is a section for Customer Item Numbers:

Customer's Item Number	Customer's Item Description	Customer Name	Unit of Measure	Comments	Instructions
DESK LAMP CASE		Mr. Ronald Black	Case		

Buttons at the bottom: Find, Select, Cancel.

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SmartFinder (Items)

Select filter ranges and press Find. The default finder columns will appear as shown. Quantities will be from the location shown and for all locations.

PTDEMO - Extended Shipment Entry

File Help

Find Items By
Show All Records

Item Range
Select Items By From To
(None) (None) (None) (None)
Additional Criteria... Reset Defaults

Location 1 Central warehouse - Seattle
Price List USA US Price List

Item Number	Description	Price	Qty. Available	Qty. Available (All)	Status	Comment 1
A1-103/0	Fluorescent Desk Lamp	59.99	137	657	Active	Comes with stand and m
A1-105/0	13W Mini Fluorescent Bulb	7.10	70	378	Active	Replacement bulb.
A1-310/0	Halogen Desk Light	50.35	128	443	Active	Desk lamp with adjustabl
A1-320/0	50W/12V Halogen Bulb	6.39	80	135	Active	Replacement bulb.
A1-400/0	Desk Note Book	24.95	190	542	Active	One day per page.
A1-401/0	Desk Calendar Pad	15.99	184	579	Active	One month per sheet.
A1-450/0	Bulletin Board	17.70	234	731	Active	Aluminum frame with squ.
A1-460/0	White Melamine Board	34.75	17	58	Active	Aluminum frame and whit
A1-470/0	Dry-erase White Board Markers	11.32	234	835	Active	Set of 8.
A1-500/0	Hanging File Folder	6.49	50	50	Active	Available in red, blue, yel
A1-600/0	Letter Figuring Pads	0.57	30	30	Active	96 sheets per pad.
A1-650/0	Highlighter	0.64	1000	2500	Active	Available in a choice of fl
A1-655/0	Pen	1.20	1000	2500	Active	Available in blue, black, c
A1-656/0	Pencil	0.16	500	500	Active	Available in four grades: i
A1-700/0	Calculator	51.06	40	40	Active	10-digit print display.
A1-750/G	Stapler - Image-1500 Series	28.36	50	50	Active	Lightweight durable plast
A1-751/B	Stapler - Kings-5000 Series	35.43	0	0	Active	Lightweight durable plast
A1-752/B	Letter Tray - Kings-5000 Series	12.95	0	0	Active	Stacking two-pack letter
A1-753/B	Paper Clip Dispenser - Kings-5000 Series	8.62	59	69	Active	Holds business cards.
A1-754/B	Tape Dispenser - Kings-5000 Series	31.60	0	0	Active	Black only.
A1-755/G	Letter Tray - Image-1500 Series	11.34	0	0	Active	Stacking two-pack letter

Find Select Cancel

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SmartFinder (Items)

To control the columns displayed in the Item Finder, click on File, Settings. The default settings are show here, with all possible inclusion columns. Note that optional and calculated fields are available for inclusion, for example Item's Color and Qty. Available for Sale.

Defaults:

TaiRox Software Inc. - Extended Order Entry Settings

Unformatted Item Number
Alternate Item Set Number
Date Last Maintained
Account Set Code
Stocking Unit of Measure
Unit Weight
Commodity Number
Date Inactive
Segment 1
Segment 2
Segment 3
Segment 4
Segment 5
Segment 6
Segment 7
Segment 8
Segment 9
Segment 10

Include ->
<- Exclude
All ->
<- None

Item Number
Description
Price
Qty. Available
Qty. Available (All)
Status
Comment 1
Structure Code
Category
Stock Item
Default Picking Sequence
Default Price List Code
Sellable
Serial Numbers
Lot Numbers

Up
Down

The maximum number of columns is 50, selected is 15

OK Cancel

Additional Inclusion Options:

- Comment 2
Comment 3
Comment 4
Allow Item in Web Store
Kitting Item
Optional Fields
Default Kit Number
Weight Unit of Measure
Unformatted Alternate Item
Alternate Item Number
Alternate Item Description
Costing Method
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 Code
Default Serial Contract Code
Serial is on Cont. When Rec
Serial is on Warr. When Sold
Serial is on Warr. When Rec
Lot Number Mask
Next Lot Number
Use Lots Days to Expire
Lots Days to Expire
Use Lots Days on Quarantin
Lots Days on Quarantine
Allow Different Lot Qty
Lots Optional Fields
Default Lot Warranty Code
Default Lot Contract Code
- Lot is on Cont. When Receiv
Lot is on Warr. When Sold
Serial Numbers in Use
Serial Mask Structure
Serial Mask Description
Unformatted Serial Number
Serial Number
Auto-gen Serial Number
Number of Serials to Genera
Number of Serials not Gener
First Generated Serial
Last Generated Serial
Lot Numbers in Use
Lot Mask Structure
Lot Mask Description
Unformatted Lot Number
Lot Number
Auto-gen Lot Number
- Number of Lots to Generate
Number of Lots not Generat
First Generated Lot
Last Generated Lot
SIA Preferred Vendor Type
Default BOM Number
Item's Color
Dangerous Item
Extended Warranty Availabl
Item Type
Item Lead Time
Manufacturer
Manufacturer Number
New Item
Price
Item Procurement
Item Size
Item Volume
- New Item
Price
Item Procurement
Item Size
Item Volume
Warranty
Warranty Period
Qty. On Hand
Qty. On Order
Qty. On Sales Order
Qty. On Hand (All)
Qty. On Order
Qty. On Sales Order (All)
Stocking Unit of Measure
Qty. Committed
Qty. Committed (All)
Qty. Available for Sale
Qty. Available for Sale (All)

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Ship by Picking Sequence

Ship by Picking Sequence functionality is most useful when a large shipment has been picked and now the picked items are to be recorded as shipped. The picking slip is in picking sequence order with quantities marked. The shipment entry form is displayed in line number order. Matching and recording the entries can be time-consuming. Ship by Picking Sequence addresses these problems.

When the Ship button is pressed a window pops up that displays items in a number of different orders, most particularly by Picking Sequence order or by Location, by Picking Sequence order. Three levels of sort order are provided. Picked entries can be entered on this form using a time-saving “enter-tab-enter-tab-...” sequence.

Lin...	Type	Item No./ Misc. Charge	Kit/BOM	Description	Price List	Location	Deliver By	Exp. Ship Date
1	Item	A1-103/0		Fluorescent Des...	USA	2	6/30/2020	6/30/2020
2	Item	A1-105/0		13W Mini Fluore...	USA	2	6/30/2020	6/30/2020
3	Item	A1-900/B		Answering Mach...	USA	2	6/30/2020	6/30/2020

	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	23	426	0	657

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Ship by Picking Sequence

When the Ship button is pressed a window pops up that displays items in a number of different orders, most particularly by Picking Sequence order or by Location, by Picking Sequence order. 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: Qty. Shipped. This enables you to enter the picked entries quickly (“enter-tab-enter-tab-...”).

The screenshot shows a software window titled "PTDEMO - Ship". It 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 "Picking Sequence"), "Location", and "Item". A "Load" button is located to the right of these dropdowns. The main area is a grid with the following data:

Line Number	Picking Sequence	Item	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped
1	0040	A1-103/0	Fluorescent Desk Lamp	2	Ea.	9	2
2	0046	A1-105/0	13W Mini Fluorescent Bulb	2	Ea.	8	0
3	0900	A1-900/B	Answering Machine	2	Ea.	1	0

At the bottom of the window, there is a summary table:

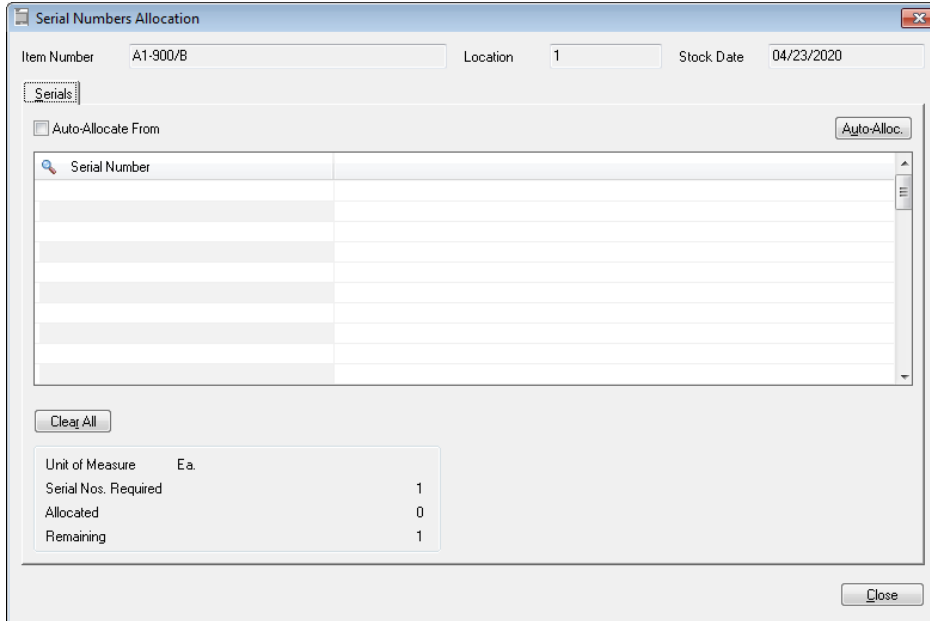
	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	262	9	50	0	262
All Locations (Ea.)	657	23	426	0	657

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

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Ship by Picking Sequence

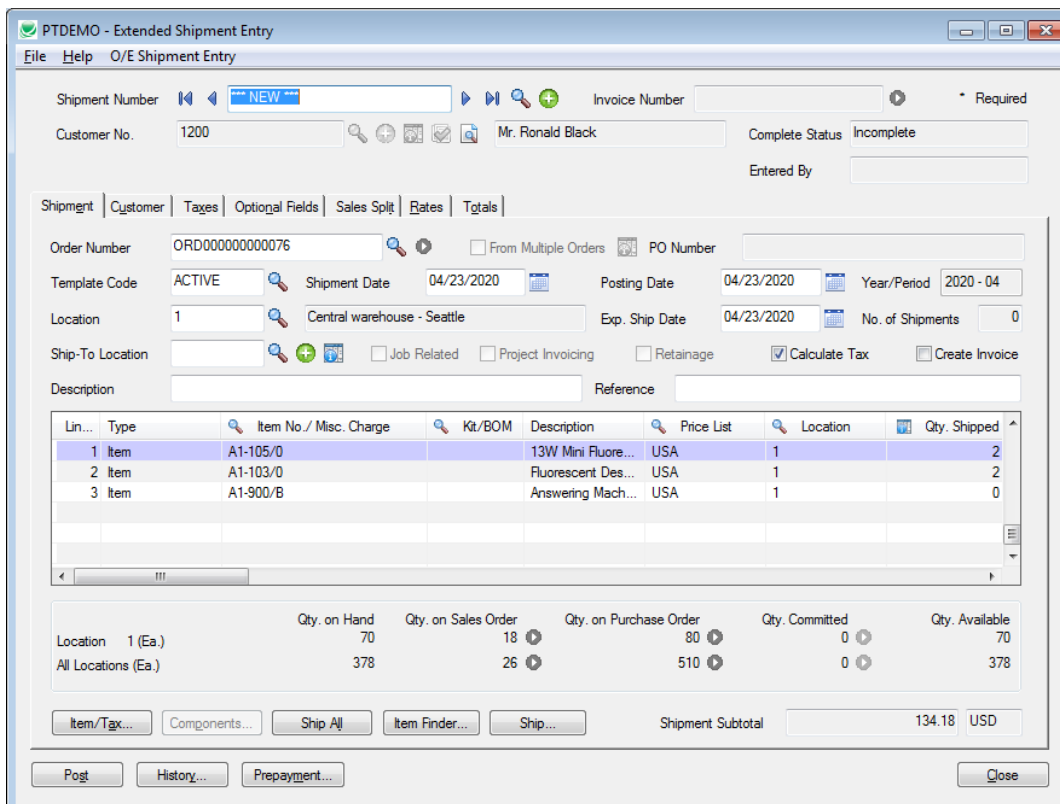
Note: If you change the quantity shipped for an item with a serial number, the Sage 300 logic will kick-in and you may see pop-up Sage 300 windows like the following, which are dealt with using standard Sage 300 techniques.



The 'Serial Numbers Allocation' window is used to manage serial numbers for a specific item. It includes fields for Item Number (A1-900/B), Location (1), and Stock Date (04/23/2020). A 'Serials' table is present, along with an 'Auto-Allocate From' checkbox and an 'Auto-Alloc.' button. A 'Clear All' button is also available. At the bottom, a summary table shows the following data:

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

Once the Ship window is closed, the Qty. Shipped numbers in the shipment entry form will be updated as shown here.



The 'PTDEMO - Extended Shipment Entry' window displays a comprehensive view of a shipment. It includes fields for Shipment Number (NEW), Invoice Number, Customer No. (1200), and Customer Name (Mr. Ronald Black). The 'Complete Status' is 'Incomplete'. The 'Shipment' tab is active, showing details like Order Number (ORD00000000076), Template Code (ACTIVE), Shipment Date (04/23/2020), Posting Date (04/23/2020), Location (1), and Exp. Ship Date (04/23/2020). A table lists the items in the shipment:

Lin...	Type	Item No. / Misc. Charge	Kit/BOM	Description	Price List	Location	Qty. Shipped
1	Item	A1-105/0		13W Mini Fluore...	USA	1	2
2	Item	A1-103/0		Fluorescent Des...	USA	1	2
3	Item	A1-900/B		Answering Mach...	USA	1	0

At the bottom, a summary table shows the following data:

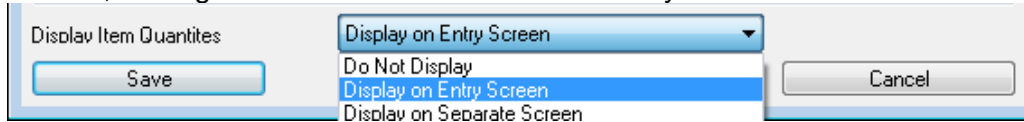
	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	70	18	80	0	70
All Locations (Ea.)	378	26	510	0	378

The 'Shipment Subtotal' is 134.18 USD. Buttons for 'Item/Tax...', 'Components...', 'Ship All', 'Item Finder...', 'Ship...', 'Post', 'History...', 'Prepayment...', and 'Close' are visible at the bottom.

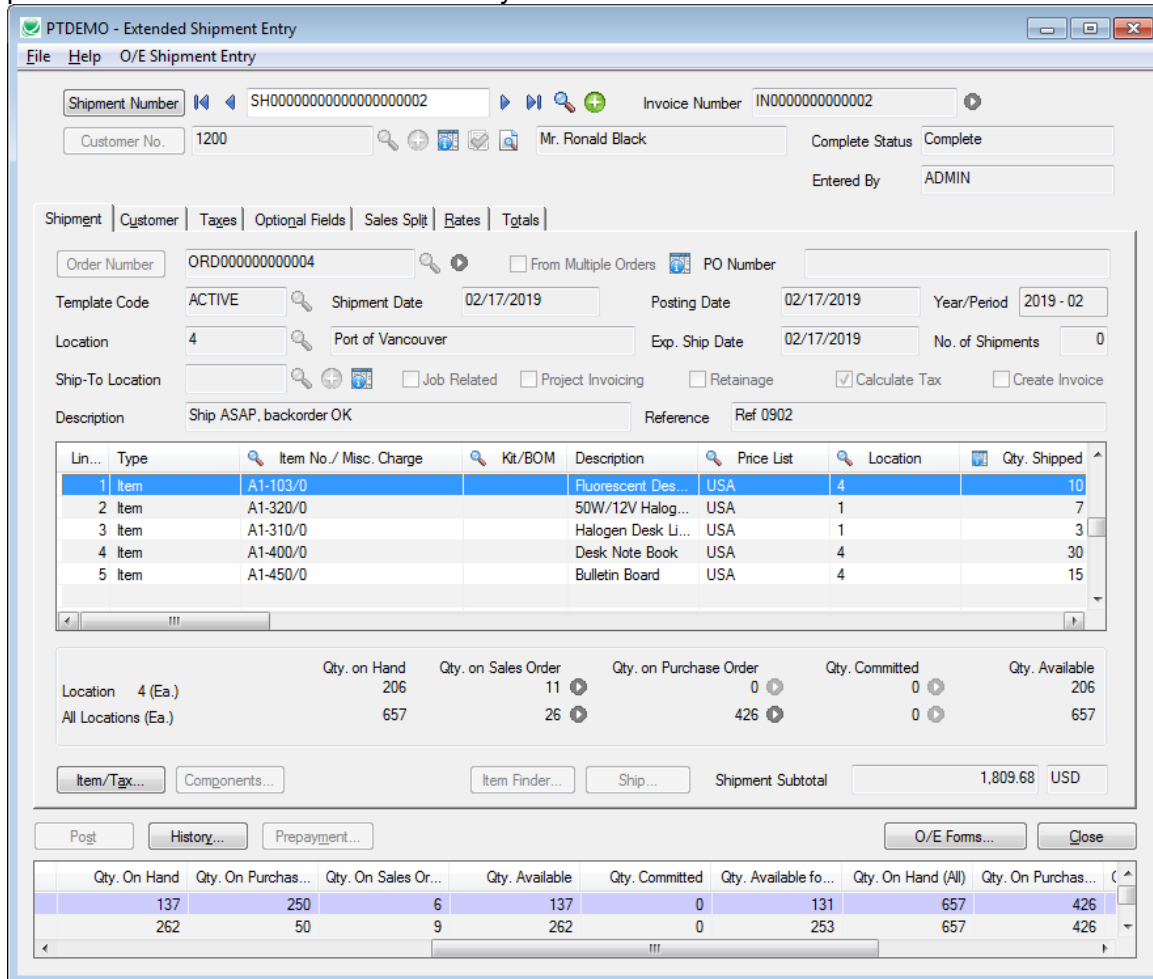
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Item Quantities

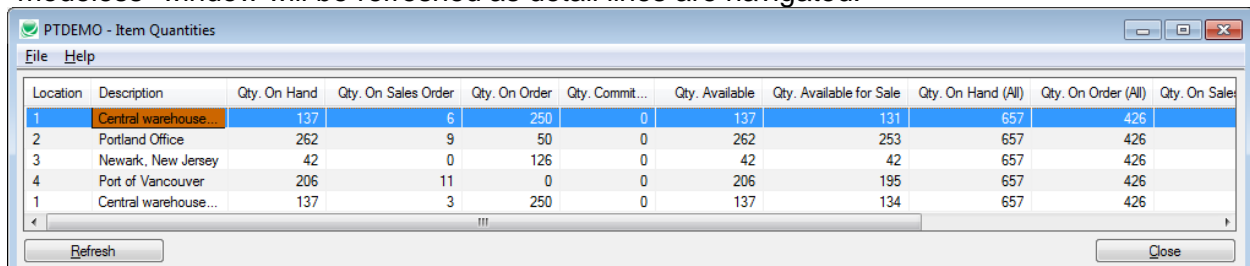
The Item Quantities feature will display quantities available at other locations, including in other companies while entering a shipment. Three settings control this feature and are available from the File, Settings menu in the Extended Order Entry window:



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:



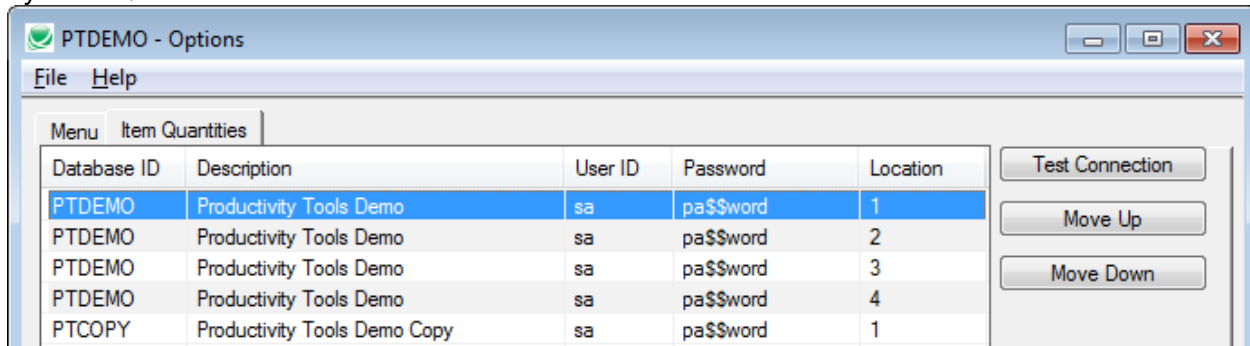
The Display on Separate Screen choice will show quantities in a separate window. This "modeless" window will be refreshed as detail lines are navigated.



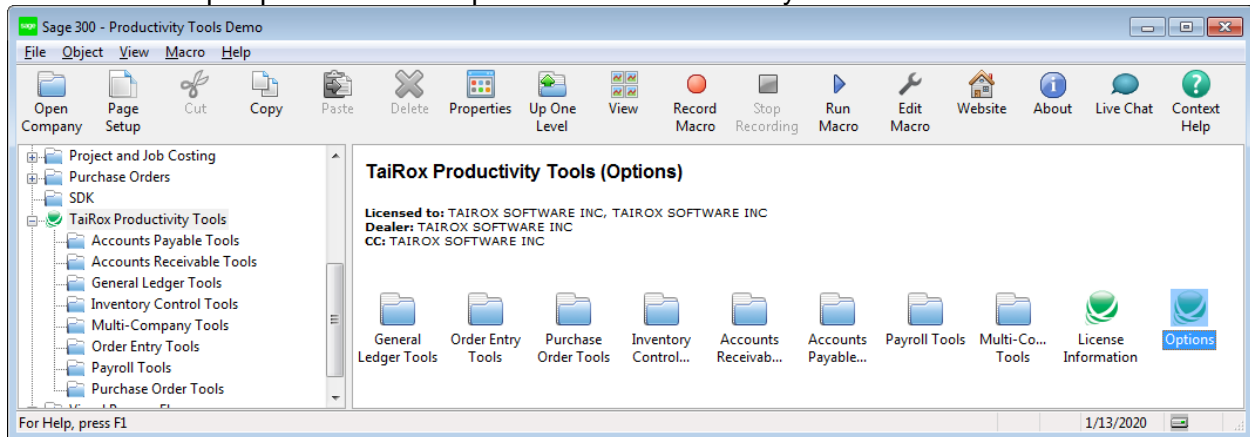
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Item Quantities

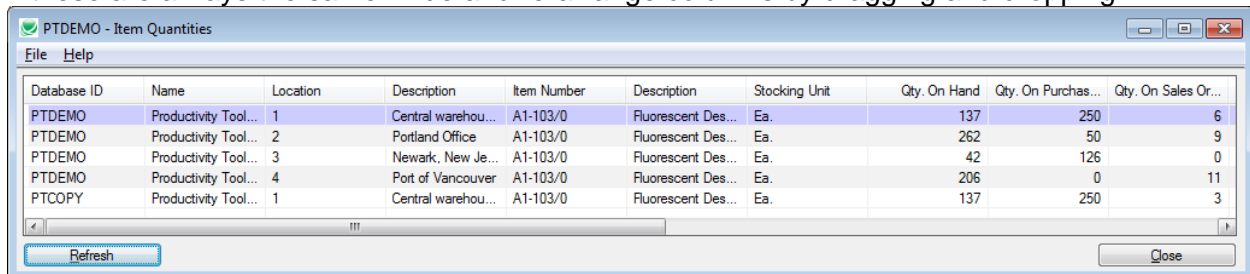
An administrator will set up the Sage 300 company databases and locations that are displayed by Item Quantities:



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



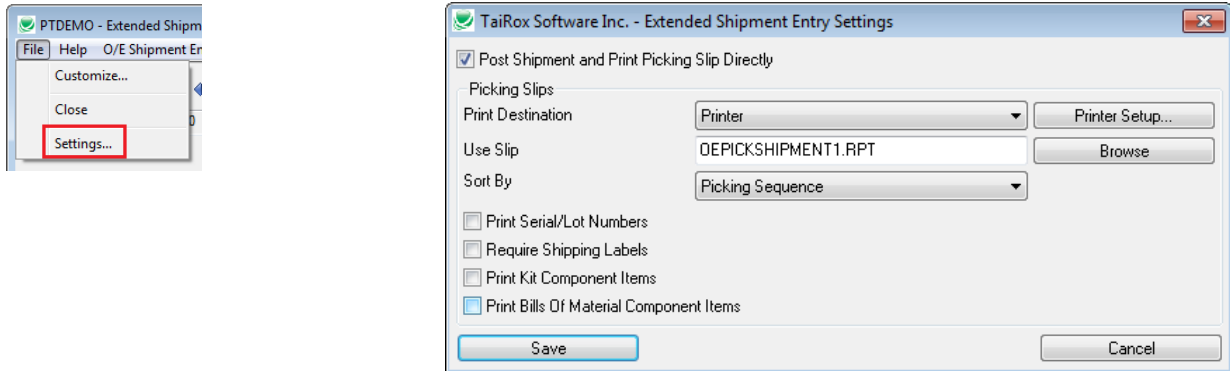
The default Item Quantity display will show many columns that will be hidden in most situations. For example, the Database ID and Name would be hidden if all locations are in the same Sage 300 company. For example, the Item Description and Stocking Unit for an item would be hidden if these are always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



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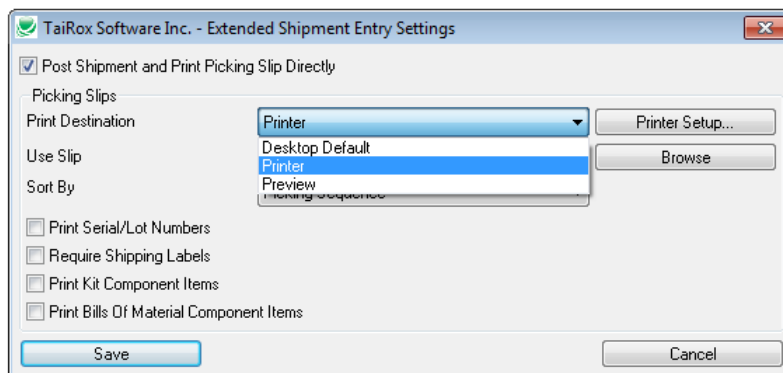
Print Picking Slips Fast

Extended Shipment Entry provides a means to streamline the printing of picking slips, in situations where large numbers of these are to be printed as quickly as possible. The settings functions are accessible from the File menu, rather than forcing the user to answer the setup questions in a pop-up dialog box:



Unless the checkbox at the top is selected, the printing behavior will be unchanged.

There are 3 settings options for the Print Destination. Every one of these avoids the setup and print picking sequence dialogs. The Printer choice will print directly on the printer, over-riding the Desktop settings. A Preview setting provides a way to do a final preview before printing:



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Quick PJC Entry

When entering Sage 300 Project and Job Costing entries in a shipment and when multiple lines use the same selections for Contract, Project and Category, Extended Shipment 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:

The screenshot shows the 'PTDEMO - Extended Shipment Entry' window. The form includes the following fields and sections:

- Shipment Number:** SH00000000000000000064
- Invoice Number:** (Required)
- Customer No.:** 1200
- Mr. Ronald Black** (Customer Name)
- Complete Status:** Incomplete
- Entered By:** ADMIN
- Order Number:** ORD0000000000076
- Template Code:** ACTIVE
- Shipment Date:** 04/23/2020
- Posting Date:** 04/23/2020
- Year/Period:** 2020 - 04
- Location:** 1
- Central warehouse - Seattle** (Location Name)
- Exp. Ship Date:** 04/23/2020
- No. of Shipments:** 0
- Ship-To Location:** (Empty)
- Job Related:**
- Project Invoicing:**
- Retainage:**
- Calculate Tax:**
- Create Invoice:**

Lin...	Type	Contract	Project	Category	Cost Class	Item No.
1	Item	120-1200-10	1002	PRCHWHTBRD	Material	A1-460/0
2	Miscellaneous	120-1200-10	1002	INSTLABOR	Labor	200310
3	Miscellaneous	120-1200-10	1002	INSTLABOR	Labor	

Inventory Summary:

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

Buttons: Item/Tax..., Components..., Ship All, Item Finder..., Ship..., Shipment Subtotal: 140.00 USD, Post, History..., Prepayment..., Close

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Margin and Recent Cost Columns

Extended Shipment Entry's line detail grid now includes 4 additional columns to display: Margin Percent, Markup Percent, Margin Amount and Most Recent Unit Cost (based on P/O receipts). Click on the Shipment Margin button at any time to see the margin on the order as a whole.

Time is saved when margins may be constrained contractually or when the most recent cost may be used rather than a price list.

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

The screenshot displays the PTDEMO - Extended Shipment Entry application. The main window shows shipment details for SH00000000000000000001, Invoice Number IN0000000000000001, Customer No. 1520, and Mr. Stephen Kershaw. A popup window titled "PTDEMO - Shipment Margin" is open, showing the following data:

Margin Percent	27.90042
Markup Percent	38.69707
Margin Amount	90.62

The main grid below the popup shows two lines with the following data:

Non-Stk. Cl...	Order No.	Optional Fi...	Margin Percent	Markup Percent	Margin Amount	Most Recent Unit Cost
	ORD0000000000...	Yes	34.00791	51.53331	6.02	15.421835
	ORD0000000000...	Yes	26.70671	36.43814	3.02	10.954294

At the bottom of the main window, a summary table shows inventory levels:

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	167	2	200	0	167
All Locations (Ea.)	731	2	825	0	731

The Shipment Subtotal is 324.78 USD. Buttons for "Post", "History...", "Prepayment...", "O/E Forms...", and "Close" are visible at the bottom.