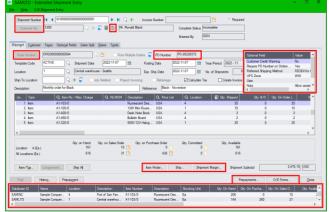
# **Extended Shipment Entry**

Extended Shipment Entry is an enhanced replacement for the Sage Shipment Entry screen. It provides you with more functionality for shipping orders, and fast access to order, customer, and item information. The following screens show some of the visible features provided by Extended Shipment Entry screen:

#### Sage Shipment Entry screen



### TaiRox Extended Shipment Entry screen



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

<u>SmartFinder – Shipments</u> Find shipments quickly for a customer from a name, number or address. <u>SmartFinder – Customers</u> Find a customer quickly from a name, phone number or address. <u>SmartFinder – Orders</u> Find an order quickly from a name, 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 Shipment 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>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.

<u>Calculate Expected Ship Date</u> Use the Business Days and Non-Business Days optional field in the Productivity Tools Options program to calculate expected ship dates in Extended Shipment Entry. <u>Customer Optional Fields</u> Display customer optional fields on the Extended Shipment Entry screen. <u>Require PO Number</u> Optionally require PO numbers on shipments for all or selected customers. <u>Display and Edit Optional Fields in the Shipment Entry Detail Grid</u> Optional fields appear as grid columns.

<u>Other Restictions 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.
- o Show unit of measure totals on the Extended Shipment Entry screen.
- o Include the discount percent set on shipment lines and for the shipment as a whole.
- Prevent 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 shipments.

<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>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>Item Quantities</u> Display quantities available at other locations or companies while entering an order.

<u>Quick Forms Printing (O/E Forms)</u> Print an order confirmation, picking slip, or invoice order – or email a packing slip – without posting the shipment 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.

<u>Prepayments</u> lets you view order prepayments entered in Order Entry, Shipment Entry, or in Accounts Receivable.

<u>Quick PJC Entry</u> Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

## SmartFinder – Shipments

Click the Shipment Number button to open the SmartFinder for searching shipments. Shipment Number

### Search:

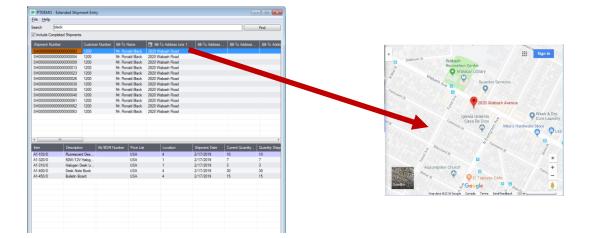
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can include completed shipments.
- Search displays shipments that contain the search string in any of the searched fields for example, one record may have "Royal" in the name, where another may 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 a shipment 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.

### Display:

- The top grid displays the shipments matching the search criteria. Double-click to select a shipment.
- The bottom grid displays the details of the shipment highlighted in the top grid.
- Click the Bill-To Address Line 1 column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the location of Ship-To addresses.
- Double-click email addresses (such as the Bill-To E-mail) to create new emails.



## SmartFinder – Customers

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

### Search:

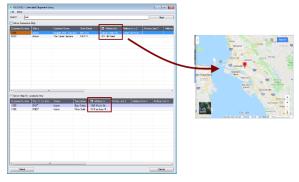
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can also filter for Active Customers only.
- Search displays customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have "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 "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 Customer Name field and "Blvd" is in the Address Line 1 field.)
- o Addresses (e.g. all fields in the customer address) are treated as a single field.

### Display:

- The top grid displays the customers matching the search criteria. In the screen below, two customers matched "oak": one for "Oakland" and one for "Roanoke".
- The bottom grid displays the ship-to locations that match the search criteria. Two ship-to locations contained "oak" in the addresses. Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor address. You can also check the locations of Ship-To and Bill-To addresses.



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

## Selection:

- Double-click a shipment in the top grid to select the shipment.
- Double-click a ship-to address in the bottom grid to add the customer and this ship-to address to the shipment.

## SmartFinder – Orders

Click the Order Number button to open the SmartFinder for searching orders. Order Number

- 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:

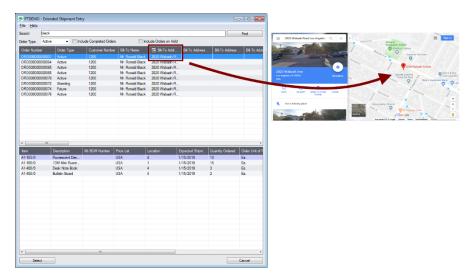
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by order type and include completed and on-hold orders.
- Search returns records which contain the search string in any of the searched fields for example, one record may have "Royal" 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 a PO where "Ross" is in the Vendor Name field and "Blvd" is in the Address 1 field.)
- o 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 – Items

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

Item Finder...

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 Shipment Entry						-	×
<u>File</u> <u>H</u> elp							
Items Manufacturer's Item Number							
Find Items By Search							
Location 1	Central warehou	ise - Seattle					
Price List							
Active Items Only							
🖾 Item Number Description	Price	Qty. Available	🖪 Qty. Available (All)	Status	Comment 1		

- The Item Finder appears with the "Search" 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 0 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 Shipment 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 warehous	se - 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 Enterprise 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 Shipment Entry		-	×
1	ile <u>H</u> elp			
F	Items Manufacturer's Item Number			
	Find Items By Search Show All Records Item Number Description Structure Code	Central warehouse - Seattle		
	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.
- 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 Shipment Entry	-	×
Eile Help		
Items Manufacturer's Item Number		
Find Items By		
tem Number V Starts with V		
Starts with		
tem 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.

Note that the "Search" choice automatically looks in all fields shown as columns in the grid.

- **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 to use 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 to use 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 to use 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 to use 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 *displayed* by the Item Finder.)
- 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.

😸 SAMLTD	- Extended Shipment Entry						-		×
Eile Help									
tems Manu	facturer's item Number								
Find Items B									
Search	~	desk lamp							
Location	1	Central warehouse	Seattle						
Price List									
Active Item	is Only								
Item Num					Cty. Availa	Status			
A1-103/0	Ruorescent Desk Lamp		59.99	161	616	Active	Comes with a		
A1-310/0	Halogen Desk Light		50.35	75	392	Active	Desk lamp w	th adjusta	ble re
									- 1
									_
									- 1
<									>
Customer Item	Numbers		_						
Customer's I		cription Custome	Mana	Unit of N	feasure Comme		Instructio		^
DESK LAMP		Mr. Bonz			neasure Comme	nks	Instructio	15	
DESKLAMP	UASE	Mr. Hona	IO BIBCK	Case					
L						_		_	¥
Find						Select		Cancel	

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

### Selection:

- Double-click an item in the top grid to select it on the shipment.
- Double-click a customer item number to enter the item number and the customer item number into the shipment form.

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

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

SAMLTD - Extended Shipment Entry	SAMLTD - Extended Shipment Entry Settings	×
File     Help       Close     Settings       Reset Defaults     Price List       Active Items Only     Item Num       Besoription     Flat103/0       A1-03/0     Flaorescert Desk Lamp       A1-310/0     Halogen Desk Light	Include ->     Include ->       Atternate item Set Number Date Last Minitarined Stocking Unit of Measure Unit Weight Commotify Number Degrated 12     Include ->       All ->     C: Exclude       All ->       Commotify Number Degrated 12       Segment 2       Segment 4       Segment 5       Segment 6       Segment 7       Segment 8       Segment 10       Segment 10	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 Item's Color and Qty. Available for Sale.

Defaults:				
SAMLTD - Extended Shipn	nent Entry Settings		×	
Urformatted kern Number         ▲           Atternate kern Set Number         Date Last Maintained         ▲           Account's 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 10         ✓         ✓	All -> Cate       <- Exclude	Available Available (All) is ment 1 ture Code gory k Item ult Pricking Sequence ult Prick List Code	Up Down	
The maximum number of columns		ОК	Cancel	
Additional Inclusion Op Comment 2 Comment 3 Comment 4 Allow Item in Web Store Kitting Item Dptional Fields Default Kit Number Weight Unit of Measure Unformatted Alternate Item 1 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 Cod Default Serial Warranty Cod Serial is on Warr. When Rec Serial is on Warr. When Rec Serial is on Warr. When Rec Lot Number Wask Next Lot Number Use Lots Days to Expire Lots Days to Expire Lots Days to Expire 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 Receir Lot is on War. When Sold Serial Numbers in Use Serial Mask. Description Unformatted Serial Number Serial Number Auto-gen Serial Number Number of Serials to Genera Number of Serials to Genera Number of Serials not Genera Tirst Generated Serial Lot Number Sin Use Lot Mask Structure Lot Mask Description Unformatted Lot Number Auto-gen Lot Number	Price Item Procurement Item Size	New Item     Price     Item Procurement     Item Size     Item Volume     Waranty     Waranty Period     Qty. On Hand     Qty. On Order     Qty. On Sales Order     Qty. Arailabet for Sale     Qty. Available for Sale     Qty. The sale for Sale     Qty. Available for Sale     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 Shipment Entry		×
<u>F</u> ile <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Search V		
Manufacturer's Item Number		
Manufacturer's Item Description		
Search		
A Manufacturer's Item Number   Manufacturer's Item Description   4 Item Number   Description Price   Qty.	Available	🗳 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 Shipment Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Manufacturer's Item Number V Starts with V		
Starts with		
Contains 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 the manufacturer's item number and the manufacturer's item description fields.

## **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.

Shipment Number	••• NEW ••••	► ► Q +	Invoice Number	* Required
Customer No. 12	200	🔍 🕂 🥫 🗟 Mr. Ronald	i Black Co	mplete Status Incomplete
<u>F</u> ile <u>H</u> elp A/R	ttended Custom Customer Inquiry	er Inquiry	- Amounts In Customer Currer	
		iustments   Pe <u>n</u> ding   <u>O</u> EOrders   <u>O</u> EIn atus   Co <u>m</u> ments   Optional F <u>i</u> ds.   <u>S</u> hip-1		
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 for Shipments

The Extended Shipment Entry program will automatically calculate the expected ship date on the header and details of each shipment, 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.

Sage 300 - Sample Company Limit	ed				Administrator		×
Home							
TaiRox Productivity Tools     Accounts Payable Tools	TaiRox Pro	ductivity Too	ls (General L	edger Tool	s)		
Accounts Receivable Tools Administrative Services Tools	Licensed to:	Don Thomson, TAIROX S FaiRox Software, Inc		5	,		
General Ledger Tools Inventory Control Tools	CC:	Don					
Multi-Company Tools		_	-	-	-	-	
Order Entry Tools Payroll Tools	General Ledger Tools	Order Entry Tools	Purchase Order Tools	Inventory Control Tools	Accounts Receivable Tools	Accounts Payable Tools	
Purchase Order Tools		_				_	
US Payroll     Visual Process Flows     A/P Transactions	Payroll Tools	Multi-Company Tools	License Information	Options	Convert Contacts	Administrative Services Tools	
Soge For Help, press F1					Sessio	n Date: 2024-03-25	<u>à</u>

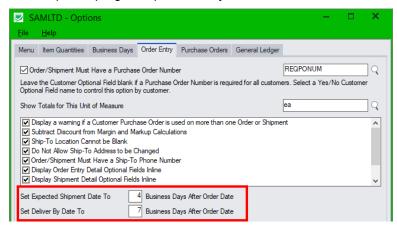
• Set your company's regular business days and additional non-business days on the Business Days tab in the Options program.

🗾 S/	AMLTD - Opti	ions				-		×
<u>F</u> ile	<u>H</u> elp							
Menu	Item Quantities	Business Days	Order Entry	Purchase Orders	General Ledger			
	iiness Days Sunday Thursday	☑ Monday ☑ Friday	⊡ Tue	. –	Vednesday			
Non-E	Business Days Opt	ional Field				NONBUSD	AYS	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 Shipment Entry program for the new dates to be in effect.

• Set the number of days from the shipment date to the expected ship date on the Order Entry tab in the Options program. (Productivity Tools uses the same number of business days for orders.)



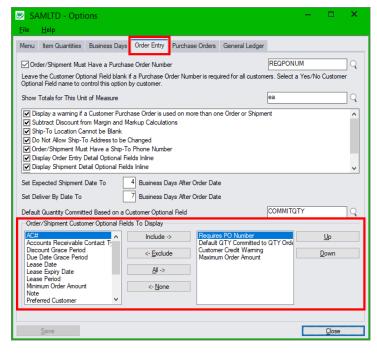
## **Customer Optional Fields**

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 Shipment Entry screen.

	nded Shipment Entry hipment Entry		- ¤ ×
Customer No.	I         4         \$F00000000000003         ▶         ▶         Q. +         Invoice Number         If         * Required           1200         Q. +         Image: Back         Complete Status [Incomplete         Complete Status [Incomplete           Entered By         ADMIN         Entered By         ADMIN         Image: Back         Image: Back <td< th=""><th></th><th></th></td<>		
Shipment Cystomer	Tages Optiogal Reids Sales Split Bates Tgtals		
Order Number	🔍 🖆 📄 From Multiple Orders 👼 PO Number PON-0009223	Optional Field Value	
Template Code	ACTIVE	Accounts Receiv Finan Note Allow	ce greater vol
Location	1 Q Central warehouse - Seattle Exp. Ship Date 12/02/2020 🛍 No. of Shipments 0	Requires Purcha Yes	
Ship-To Location	Q         + <ul> <li>Job Related</li> <li>Project Invoicing</li> <li>Retainage</li> <li>Invoice</li> <li>Create Invoice</li> </ul>		
Description	Order - Black - December 2020 Reference PON-0009223		

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

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



## Require Purchase Order Number on Shipments

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

SAMLTD - Extended ile <u>H</u> elp O/E Shipmen		- 0
Shipment Number I 4 Customer No. 1200	SH000000000000000000000000000000000000	
Shipment Customer Taxes	Optogal Fields Sales Spit: Bates Totals           Q100gal Fields         Sales Spit: Bates         Totals           Q2         From Multiple Orders         PO Number         PONH0002223         Optional Field         Value	e
Template Code ACTIVE Location 1		nce v greater vol

If you use the option to force PO numbers on shipments, but post a shipment that's missing the PO number, the following message appears.

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Notes:

- The program lets you require PO numbers for all customer shipments, or only for customers with a "Yes" value for a specific optional field. For example, the Shipment 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 a shipment.

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

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 on the Sage 300 Desktop:

SAMLTD - Options		×						
<u>File</u>								
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 shipments – and the customer record includes the control field with a "Yes" value – the following message appears when you try to post a shipment that's missing the PO number.

SAMLTD - Extended Shipment Entry Ele Help O/E Shipment Entry	- 🗆 X
Shipment Number     I     Image: Weight of the state of the s	Complete Status Incomplete Entered By
Shipment         Customer         Tages         Optional Fields         Sales Split         Bates         Tgtals           Order Number         Q         Q         Pon Multiple Orders         PO Number           Template Code         ACTIVE         Q         Shipment Date         Stipment Date	Optional Field Value   Kod 2021 - 04 Value 100 Value 2021 - 04 Value 100 Val
Location 1 Q Central wareho Ship-To Location Q + 0 Description Source: 10:15:13 -	k.
In:         City. Shipped         City. B/O         City. On Orc           10         0         Print	completes Order Quantity Yes

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

Note that the field appears 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 Shipment Grid

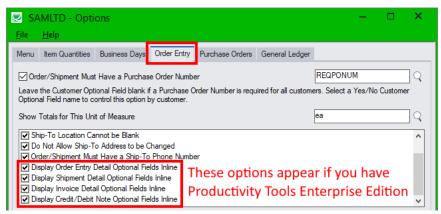
If you have the Enterprise version of TaiRox Productivity Tools, you can display and edit optional fields for order details *inline* in the Extended Shipment Entry detail grid.



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 Shipment 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

Extended Shipment Entry also includes other options 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 Shipment Entry screen.
- 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.

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

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

SAMLTD - Options	– 🗆 ×								
<u>File H</u> elp									
Menu Item Quantities Business Days Order Entry Purchase Orders General Ledger	L								
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 Shipment  Subtract Discount from Margin and Markup Calculations									
Ship-To Location Cannot be Blank									
☑ Do Not 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 Options									
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 <u>Productivity Tools Options User Guide</u> 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 Shipment Entry saves you time by displaying margin and cost data on the shipment entry screen.

Extended Shipment Entry's line detail grid includes 4 additional columns for margins and costs:

- 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.

#### Order margin information

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

_
>

## 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 shipment fields.

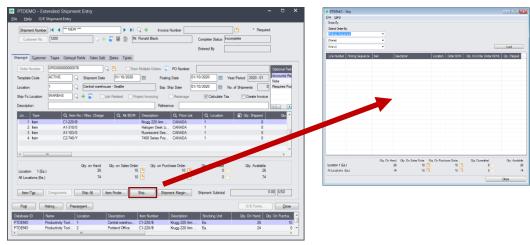
For example, the following screens show items ordered by Picking Sequence and selected by Ship-Via code.

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 shipment 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.



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
Item
Location

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

- Choose the next sorting levels if you want 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	
Evnected Shinment Date	

.....

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

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

SAMLTD - Ship								x
Eile <u>H</u> elp								
Order By								
Select Order By								
Picking Sequence		-						
Location		-						
(None)		-						
Select Items By		F	rom	То				
Ship-Via Code 👻			CT	् сст		Q		
(None)		•						
(None)		-						
							Load	
Line Number Pick	king Sequence	ltem	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped	1
1 001	0	C1-220/B	Krugg 220 Arm Tilter-Brown	1	Ea.	10	0	
4 002	3	C2-740/Y	7400 Series Posture Chair	1	Ea.	25	0	
3 004	0	A1-103/0	Fluorescent Desk Lamp	1	Ea.	8	0	l
2 004		A1-310/0	Halogen Desk Light	1	Ea.	15	0	U

- 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.

		1	1	1	1		
Line Number	Picking Sequence	ltem	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped
	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

- 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.
- 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	0	S 0 🖸	71
All Locations (Ea.)	231	15	4 [	E 0 E	231
Ship All					Close

#### 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.

m Number A1-90	)0/B			Location	1	Stock Date	07/01/2020	
<u>S</u> erials								
Auto-Allocate From							Autos	۵JIc
🔍 Serial Number								-
April-00199		٩,						
		Q Finder - Invent	ory Serial Numbers					
		<u>File K</u> ey Se <u>t</u> tir	gs <u>G</u> lobal Settings					
		Find By: Show a	I records	v F	ind Now Set Cr	iteria		
					Auto Search			
		_	1	1	1			
		Serial Number	Unformatted Ite	Location	Status	Stock Date		
Clear All		April-00198 April-00199	A1900B	1	Available Available	7/1/2020		
		April-00105	A1900B	1	Available	7/1/2020	-	
Unit of Measure	Ea.	4					- F	
Serial Nos. Required								
Allocated		Help				<u>Select</u>	incel	
Remaining								

## **Item Quantities**

The Item Quantities feature lets you display items quantities available at all inventory locations – including locations in other companies – while entering a shipment.

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

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

Post Shipment and Print P	icking Slip Directly		
Picking Slips			
Print Destination	Desktop Default	-	Printer Setup
Use Slip	OEPICKSHIPMENT1.RPT		Browse
Sort By	Picking Sequence	•	
Print Serial/Lot Numbers			
Require Shipping Labels			
	5		
Print Kit Component Item			
Print Kit Component Item:	iponent Items		
Print Bills Of Material Com	nponent Items Display on Entry Screen	-	
		•	Cancel

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

( Location 4 (Ea.) All Locations (Ea.)	Qty. on Hand 167 731	Qty. on Sales Order 2 4 2 4	Qty. on Purchase Order 200 🗳 800 🗳	Qty. Committed 0 🗳 0 🎽	Qty. Available 167 731
tem/Tax Components	l	tem Finder Ship	Shipment Margin	Shipment Subtotal	324.78 USD
Post History Prepaym	ent				O/E Forms Qlose

• **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.

Location 1 (Ea.)	Qty. on Han 2	d Qty. on Sales 0 6	Order Qty.or 10 📴	Purchase Order 10 🕒	Qty. Committed 0	Qty. Availabl 2	
All Locations (Ea.)	7	4	10 🔛	10 🔛	0 🔛	7	4
Item/Tax Compone	ents Ship All	Item Finder	Ship	Shipment Margin	Shipment Subtotal		0.00 USD
Item/Tax Compone Post History	ents Ship Al	Item Finder	Ship	Shipment Margin	Shipment Subtotal	O/E Forms	
		Description	Ship	Shipment Margin	Shipment Subtotal Stocking Unit	O/E Forms Qty. On Hand	
Po <u>st</u> History Patabase ID Name	Prepayment		Item Number		Stocking Unit		

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

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qtv. On Hand	Qtv. On Purcha	Qtv. On Sales O	Qtv. Available
PTDEMO	Productivity Tool	1	Central warehou	A1-103/0	Fluorescent Des	Ea.	137	160	10	137
PTDEMO	Productivity Tool	2	Portland Office	A1-103/0	Fluorescent Des	Ea.	262	0	9	262
PTDEMO	Productivity Tool	3	Newark, New Je	A1-103/0	Fluorescent Des	Ea.	42	126	0	42
PTDEMO	Productivity Tool	4	Port of Vancouver	A1-103/0	Fluorescent Des	Ea.	206	0	11	206

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 Shipment 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.

PTDEMO	- Options				– 🗆 ×
<u>F</u> ile <u>H</u> elp					
Menu Item Qu	antities				
Database ID	Description	User ID	Password	Location	Test Connection
SAMLTD	Sample Company Limited	sa	pass1234	1	Move Up
SAMINC	Sample Company Inc.	sa	pass1234	1	Move op
SAMINC	Sample Company Inc.	sa	pass1234	2	Move Down
SAMLTD	Sample Company Limited	sa	pass1234	2	
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.

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.

፼ PTDEI <u>F</u> ile <u>H</u> el	MO - Item Quan Ip	tities								- 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	
4	Port of Vancouver	A1-103/0	206	0	11	206	0	195	657	286	-
•											•
<u>R</u> efre	sh									Glose	

## 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 a shipment or navigating to another window.

The OE Forms popup also appears automatically when you post shipments, letting you print order confirmations, picking slips, and invoices – or email packing slips to customers – immediately after posting shipments.

**Note:** The form will not appear automatically if you choose "Post Shipment and Print Picking Slip Directly" from Extended Shipment Entry Settings. (Select **File > Settings** from the menu.) See the next section – <u>Print Picking Slips Fast</u> – for details on printing picking slips directly.

	SH000000000000000000000000000000000000	Invoid	e Number IN00000000	0002				
Customer No.	1200 🔍 🕂	🏹 🔋 👩 Mr. Ronald Black	Com	plete Status Complete		]		
			Ente	red By ADMIN		1		
			Line			]		
ipment Customer	Taxes Optional Fields Sales Split	<u>R</u> ates T <u>o</u> tals						
Order Number	DRD00000000004	From Multiple Orders	PO Number			Optional Field		Value
emplate Code	ACTIVE Shipment Date	2019-02-17 Post	ing Date 2019-02-	17 Year/Period	2019-02	Preferred Custome	er	Yes
empiate Code	G Snipment Date	Fos	ing Date	rear/renou	2013-02	Order/Shipment F	Requires PO Number	Yes
ocation 4	Port of Vancouve	r Exp.	Ship Date 2019-02-	17 No. of Shipmer	nts 0	Note		Allow g
			· ·			UPS Zone		WHI
Ship-To Location	Q 🕂 🔂 🗔 Job	b Related Project Invoicing	Retainage	🗸 Calculate Tax 📃 C	reate Invoice	Customer Credit V	Vaming	No
Description S	Ship ASAP, backorder OK	Refer	ence Ref 0902			<		>
Lin Type	Q Item No./ Misc. Charge	Q Kit/BOM Description	Q Price List	Q Location	Shipped	Qtv. B/O	Qtv. On Order (	Shipped ^
1 Item	A1-103/0	Fluorescent Des.	USA	1	10	0	10	
2 Item	A1-320/0	50W/12V Halog		1	7	0	7	_
3 Item	A1-310/0	Halogen Desk Li		1	3	0	3	
4 Item	A1-400/0	Desk Note Book		4	30	0	30	
5 Item	A1-450/0	Bulletin Board	USA	4	15	0	15	
								~
<								>
				y. Committed Qt	y. Available 206			
Leasting ((Es.)		20 🔼						
Location 4 (Ea.) All Locations (Ea.)	uty. on Hand 206 650	20 🕒 51 🎴	5 🛄	0 19	650			

## 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.

💆 O/E Forms			×
<u>F</u> ile <u>H</u> elp			
Order Number	ORD0000000004	Q	Print Order Confirmation
Shipment Number	SH000000000000000002	Q	Print Picking Slip
Invoice Number	IN00000000002	Q	Print Invoice
Shipment Number	SH000000000000000000000000000000000000	Q	Email Packing Slip
			Close

- You must select a shipment number for the Print Picking Slip and Email Packing Slip functions. By default, the current shipment number will be used unless you change it.
- Selecting the Email Packing Slip choice

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

🗾 SAMLTD - Email Pao	:king 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 Q
Print Serial/Lot Numbers	
Print Kit Component Items	
Print Bills Of Material Compon	ent Items
Email To	Email Address Entered 🗸
Email	ronaldblack99@hotmail.com; receiving@rblack.com
Progress	
Send	Close

- Select the Crystal report form for packing slips.
- o Confirm the shipment number. By default, this is the Last Shipment Number for the order.
- 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 Shipment Entry lets you streamline the printing of picking slips when you need to print large numbers of them as quickly as possible.

**Note:** The O/E Forms popup will not appear automatically after posting if you choose the "Post Shipment and Print Picking Slip Directly" option. However, you will still be able to print forms by clicking the O/E Forms button at the bottom of the screen.

Use the Settings choice on the Extended Shipment 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 Shipment Entry	👳 PTDEMO - Extended Shipme	ent Entry Settings	<b>—</b>
<u>File H</u> elp O/E Shipment Entry	Post Shipment and Print Picking	Slip Directly	
Customize	Picking Slips		
Settings	Print Destination	Desktop Default	Printer Setup
	Use Slip	OEPICKSHIPMENT1.RPT	Browse
Close	Sort By	Picking Sequence	•
Shipment Customer Taxes Optional Fields Sales	Print Serial/Lot Numbers		
	Require Shipping Labels		
	Print Kit Component Items		
	Print Bills Of Material Compone	nt Items	
	Dis <mark>olav I</mark> tem Quantites	Do Not Display	•
	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 Sip	Desktop Default Printer	
Sort By	Preview	_

## **View Order and Shipment Prepayments**

Although Sage 300 lets you add prepayments on the Order Entry and Shipment Entry screens, it doesn't let you view prepayments that have been entered for orders or shipments.

The Prepayments button on the right side of the Extended Shipment Entry screen lets you view all prepayments entered using the Order Entry screen, Shipment Entry screen, or the Accounts Receivable Receipt Entry screen that apply to the original order to the current shipment.

#### To view order and shipment prepayments:

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

Po <u>s</u> t	History Pre	pay <u>m</u> ent						Prepayments	O/E Forms	Close
Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha	Qty. On Sales O	Qty. Availa
SAMINC	Sample Compan	4	Port of San Fan	A1-103/0	Fluorescent Des	Ea.	206	0	10	;
SAMLTD	Sample Compan	1	Central warehou	A1-103/0	Fluorescent Des	Ea.	144	260	21	1
<										>

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

芝 Prepayn	nents								- 🗆 ×	
Prepayment	5									
Customer Nu	mber [	1200		Mr. Ronald Black						
Order Number ORD0000000085										
							Load			
Apply To	🕑 Document Numbe	er Payment Date	Posting Date	Customer Currency Code	Payer	Payment in Customer Curr	ency Amount Remaini	ng 🛛 🖪 Batch Number	Entry Number	
Order No.	ORD00000000085	2022-12-06	2022-12-06	USD	Mr. Ronald Black	3,85	90.45 3,890	45 66	2.	
<					1					
							Total	Total 3. Amount Remaining 3.		
							Amount Rema			
									Close	

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

- Click the Document Number column heading to drill down to the original document.
- Click the Batch Number or Batch Entry column heading to drill down to the receipt entry in Accounts Receivable.

🖾 SAMLTD - A/R R	eceipt Entry						×
<u>F</u> ile Settings <u>H</u> elp	)						
Batch Number		Q 🕞	Prepayments				
Batch Date	2020-08-30 No	o. of Entries	2 Tota	I Amount 5,00	0.000		
Bank	CCB CB	fault Currency	CAD Caposit Nu	mber 53 Q	Deposit Date	2020-08-30	
Entry Number		Q 🖪			Entered By	ADMIN	
Transaction Type	Prepayment		Receipt Date 2022-12-06	Posting Date 2022-12-06		2022 - 12	
Customer Number	1200	Q	Mr. Ronald Black		Currency	USD	
Reference					Account Set	USA	9
Payment Code	MASTER			Check/Receipt No. 564564			
Document Number	PP000000000000000000000000000000000000	Q				Job Related	
Receipt Amount	5,000.00 CA	AD Q	Customer Amount	3,890.45 USD		Optional Fields	•
Apply By	Order Number		Apply To	ORD0000000085			

## Quick PJC Entry

To speed up data entry, Extended Shipment 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 shipment 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):

SAMLTD - Extended Shipment Entry <u>F</u> ile <u>H</u> elp O/E Shipment Entry	- □	1 <b>X</b>						
Shipment Number       Image: Customer No.       1200       Image: How								
Order Number       Q       C       From Multiple Orders       PO Number       Option         Template Code       ACTIVE       Q       Shipment Date       12/02/2020       Posting Date       12/02/2020       Year/Period       2020 - 12       Accound Note         Location       1       Q       Central warehouse - Seattle       Exp. Ship Date       12/02/2020       Mote       Require         Ship-To Location       Q       +       Image: Im	ial Field nts Receiv ies Purcha	Valı Fina Allo Yes						
Description       Reference         Type       Q. Contract       Q. Project       Q. Category       Cost Class       Q. Item No.       Q. Misc. Charge         Item       120-1200-10       1009       PRCHDESK       Material       D2-513/B         Item       120-1200-10       1009       PRCHDESK       Material								
City. on Hand       City. on Sales Order       City. on Purchase Order       City. Committed       City. Available         Location       0								
< ١١		•						