

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:

[SmartFinder – Shipments](#) Find shipments quickly for a customer from a name, number or address.

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

[SmartFinder – Orders](#) Find an order quickly from a name, phone number or address.

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

SmartFinders provide fast, browser-like search capabilities to lookups on the Order Entry screen.

The SmartFinder searches more fields than the Finder and searches in all text fields at once.

For example, search for “Seattle” if you think that the vendor or contact is in Seattle.

[Customer Inquiry](#) (button left of the Customer Name field) provides complete customer data, including receipts, refunds, order, invoices, IC contract pricing, ship-to addresses, etc. using the TaiRox Extended Customer Inquiry window instead of the Sage Customer Inquiry screen.

[Customer Optional Fields](#) Display customer optional fields on the Extended Shipment Entry screen.

[Require PO Number](#) Optionally require PO numbers on shipments for all or selected customers.

[Warn for Duplicate PO Numbers on Shipments](#) Optionally warn users during shipment entry if a customer purchase order has been used on a previous order or shipment.

[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.

[Ship by Picking Sequence and Filter Items](#) 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.

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

[Quick Forms Printing \(O/E Forms\)](#) Print an order confirmation, picking slip, or invoice order – or email a packing slip – without posting the shipment or navigating to another window.

[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.

[Prepayments](#) lets you view order prepayments entered in Order Entry, Shipment Entry, or in Accounts Receivable.

[Quick PJC Entry](#) 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:

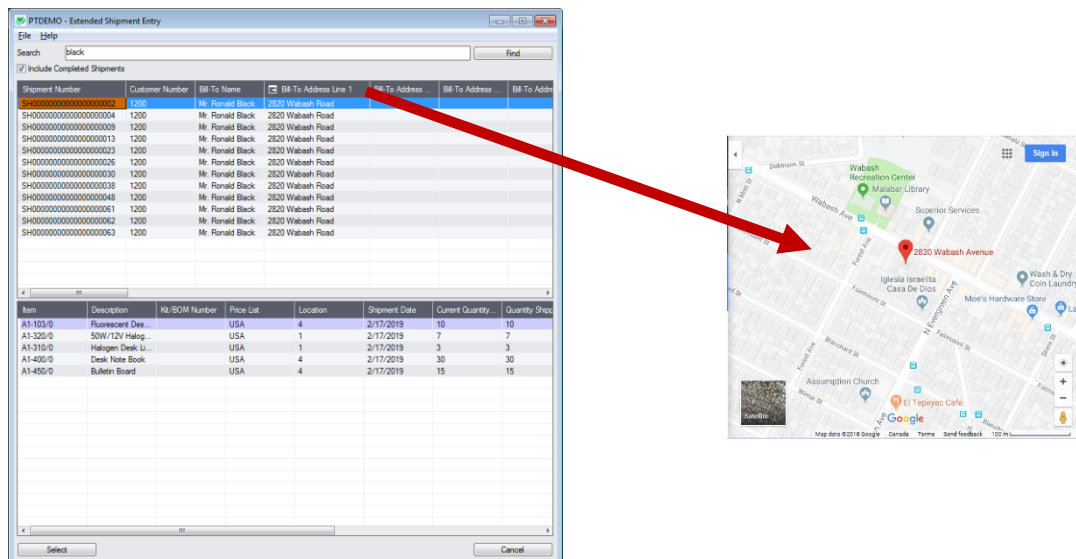
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can include completed shipments.
- Search displays shipments that contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may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

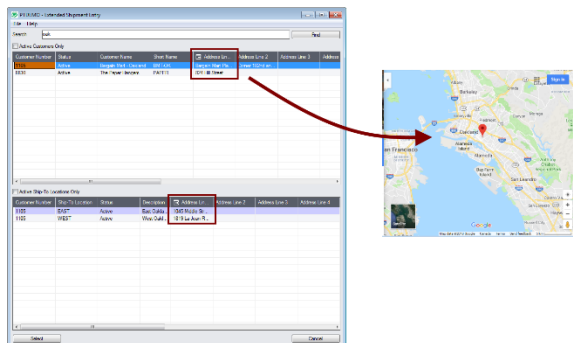
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can also filter for Active Customers only.
- Search displays customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have “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.)
- 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:

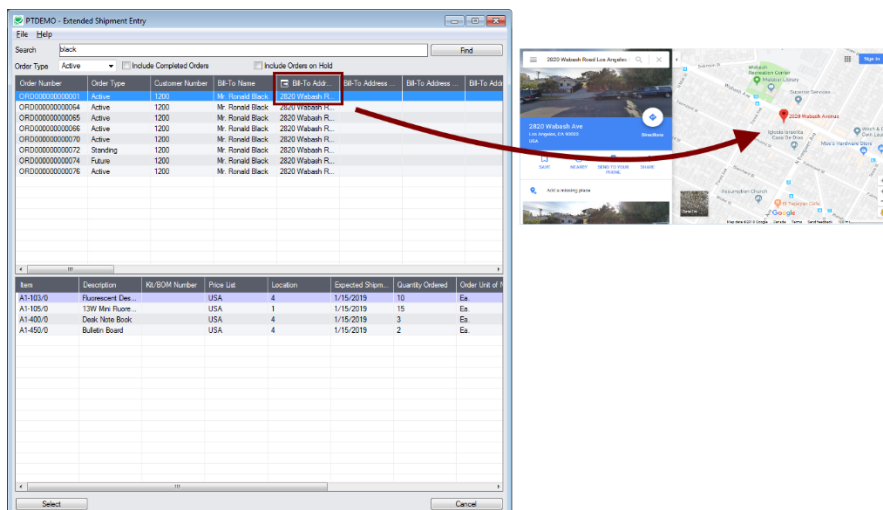
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by order type and include completed and on-hold orders.
- Search returns records which contain the search string in any of the searched fields – for example, one record may have “Royal” 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.)
- 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.

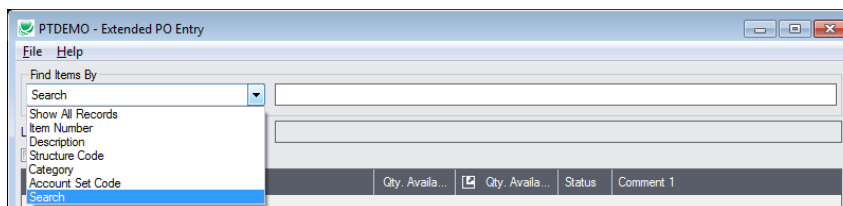
Item Finder...

The Item Finder provides 7 search options:

- **Search** – to search for words or word fragments in item text fields (item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the Shipment 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.
- **Description** – to select items 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 using 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 using 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 using 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 using more item fields.

The Search option (most common choice):

- Select Find Items by Search.



- Enter one or more words or word fragments in the next field to search multiple tables and fields.
- You can filter for Active items only.
- Search returns items and vendor 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.
 - **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:

- If using the Search option, all of the word fragments must be present in one of the fields being searched. (For example, if you searched 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.)

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.

Display:

- The top grid displays the items matching the search criteria.
- The bottom grid displays the customer’s item number for the item selected in the top grid.

The screenshot shows the PTDEMO - Extended Shipment Entry window. The search criteria are set to 'desk lamp'. The top grid displays two items:

Item Num...	Description	Price	Qty. Availa...	Qty. Availa...	Status	Comment 1
A1-103/0	Fluorescent Desk Lamp	59.99	137	657	Active	Comes with stand and mount
A1-310/0	Halogen Desk Light	50.35	128	443	Active	Desk lamp with adjustable re

The bottom grid displays the customer's item numbers for the selected item (A1-103/0):

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 include Find, Select, and Cancel.

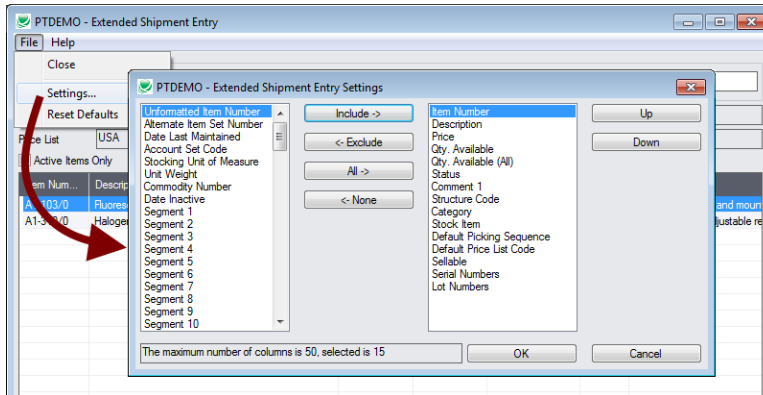
- Click the Qty. Available column to see the location details, with the quantities on hand, on purchase orders and on sales orders. You can drill down further on these quantities.

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.

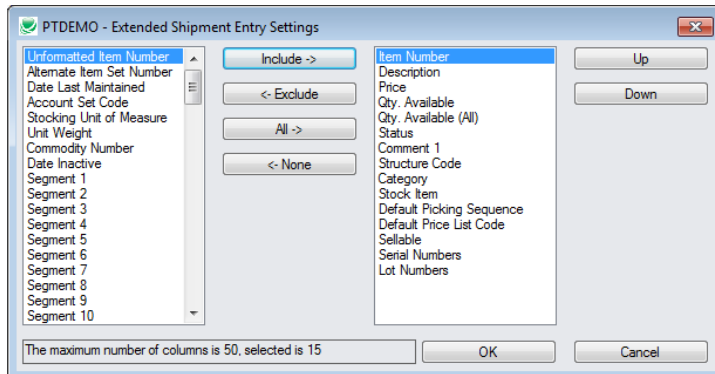
Selecting columns to display in the Item Finder

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



- 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.

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.

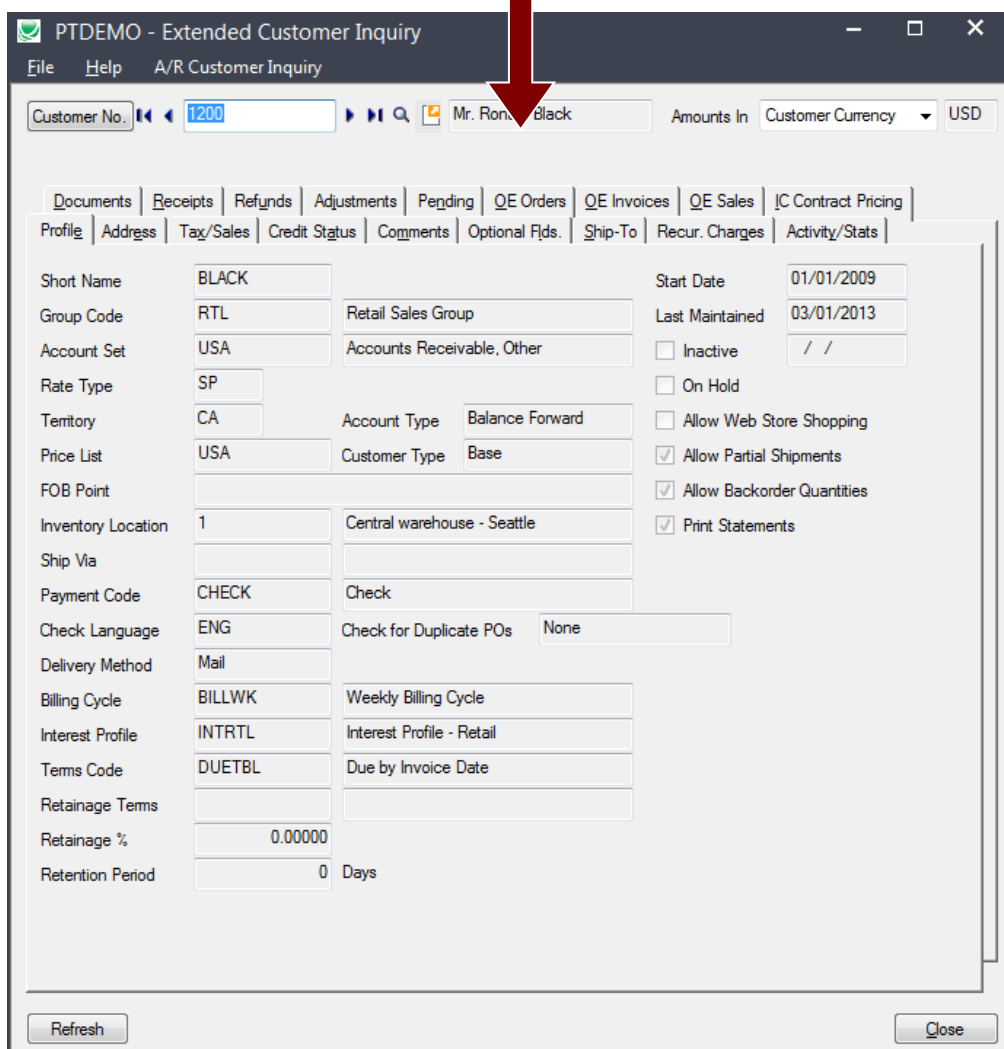
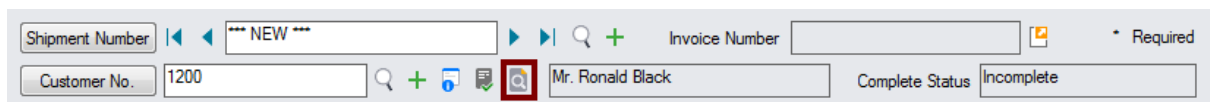


Comment 2 Comment 3 Comment 4 Allow Item in Web Store Kitting Item Optional Fields Default Kit Number Weight Unit of Measure Unformatted Alternate Item Alternate Item Number Alternate Item Description Costing Method Process Command Weight Conversion Factor Is Item a BOM Component Serial Number Mask Next 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 Sol Serial is on Warr. When Reg Lot Number Mask Next Lot Number Use Lots Days to Expire Lots Days to Expire Use Lots Days on Quarantine 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 Genera First Generated Lot Last Generated Lot SIA Preferred Vendor Type Default BOM Number Seasonal? Qty. on Hand Qty. on Purchase Order Qty. on Sales Order Qty. Available Qty. Committed Preferred Vendor Preferred Vendor Item Item's Color Dangerous Item Extended Warranty Available Item Type	Item Lead Time Manufacturer Manufacturer Number New Item Price Item Procurement Item Size Item Volume Warranty Warranty Period Qty. On Hand Qty. On Purchase Order Qty. On Sales Order Qty. On Hand (All) Qty. On Purchase Order (All) Qty. On Sales Order (All) Stocking Unit of Measure Qty. Committed	Qty. Committed (All) Qty. Available for Sale Qty. Available for Sale (All) Base Price (CAD) Pricing Unit
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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.



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.

Optional Field	Value
Accounts Receiv...	Finance
Note	Allow greater vol...
Requires Purchase...	Yes

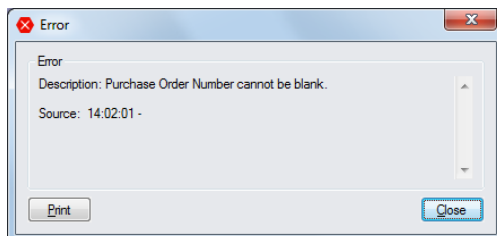
This lets you view notes concerning the account during data entry, and also view shipment requirements – in this example, one of the fields is “Require Purchase Order No.”

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

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.

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.



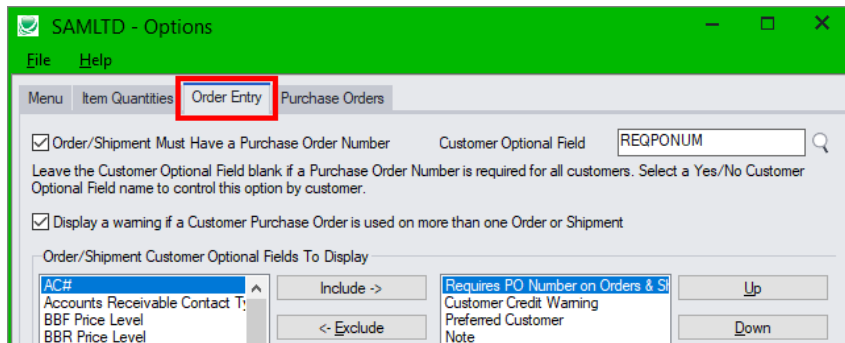
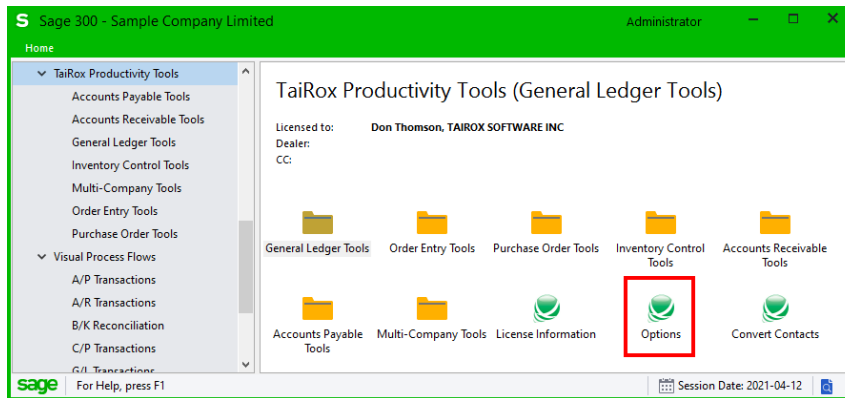
Notes:

- 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.

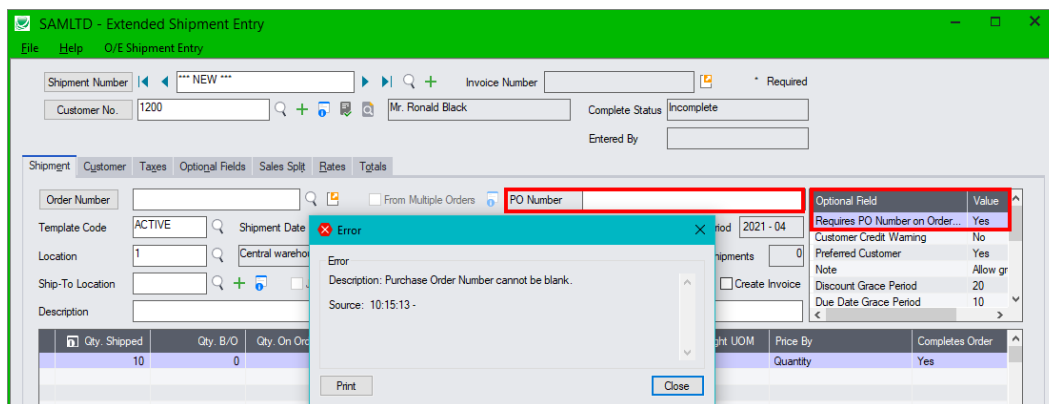
Setting Up the Option to Require PO Numbers on Shipments

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:



- 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.



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

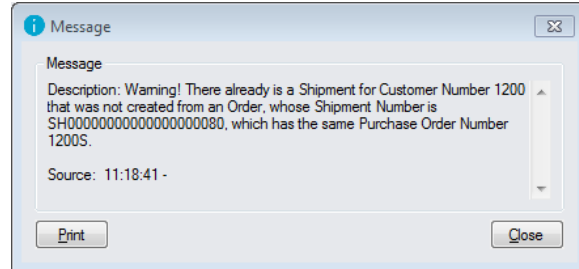
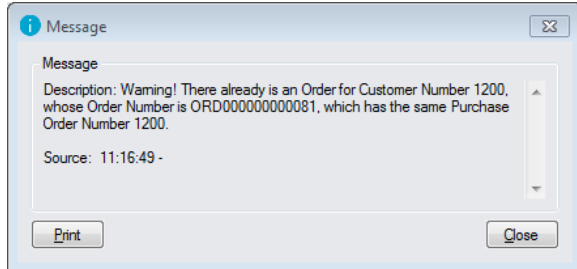
Note that the field appears if:

- 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).

Warn for Duplicate PO Numbers on Shipments

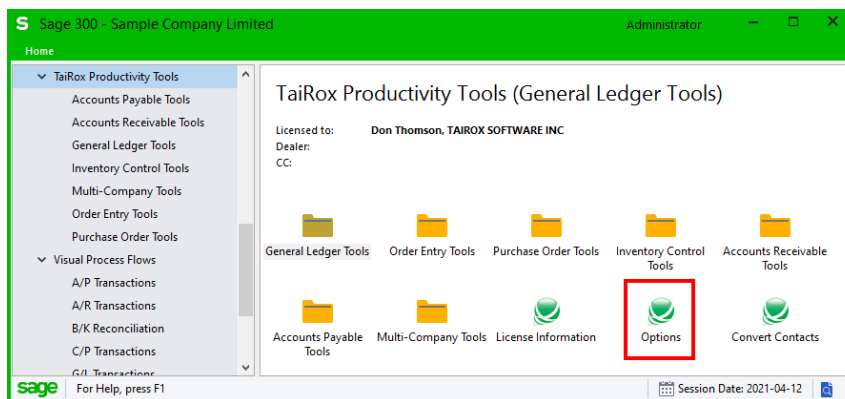
Extended Shipment Entry includes an option to warn users during shipment entry if the customer purchase order has been used on a previous order or standalone shipment. You select this option in the Productivity Tools Options program.

If you try to post a shipment where the PO number has been previously used on an order or shipment, you will see a message similar to the following.

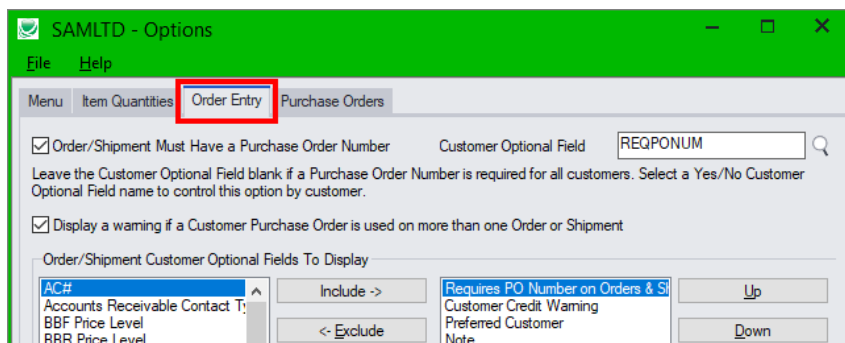


Setting Up the Option to Warn for Duplicate PO Numbers on Shipments

- Select the Productivity Tools Options program.



- Choose Order tab and then choose the option for displaying a warning for duplicate PO numbers.



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.

Item margin and cost information in the order grid

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.

Item Finder... Ship... **Shipment Margin...**

PTDEMO - Extended Shipment Entry

File Help O/E Shipment Entry

Shipment Number: SH0000000000000000046 Invoice Number: IN000000000000046

Customer No.: 1580 Break-Away Designs Complete Status: Complete Entered By: ADMIN

Shipment Customer Taxes Optional Fields Sales Split Rates Tgals

Order Number: ORD0000000000048 From Multiple Orders: PO Number:

Template Code: ACTIVE Shipment Date: 05/10/2020 Posting Date: 05/10/2020 Year/Period: 2020 - 05

Location: 4 Port of Vancouver Exp. Ship Date: 05/10/2020 No. of Shipments: 0

Ship-To Location: EAST Job Related: Project Invoicing: Retainage: Calculate Tax: Create Invoice:

Description: Overnight shipment please Reference: Ref #1005-1-1

Q	Non-Stk. Cr.	Order No.	Optional Fiel.	Margin Percent	Markup Percent	Margin Amount	Most Recent Unit C...
		ORD0000000000...	Yes	24.88662	33.13208	35.12	146.682800
		ORD0000000000...	Yes	0.35346	0.35472	0.94	366.707000
		ORD0000000000...	Yes	51.09249	104.46758	186.58	247.154060
		ORD0000000000...	Yes	26.55672	36.15949	56.50	215.892173

Location: 3 (Ea.) Qty. on Hand: 284 Qty. on Sales Order: 0 Qty. on Purchase: 1

All Locations (Ea.): 302

Item/Tax... Components... Item Finder... Ship... **Shipment Margin...**

Post History... Prepayment... O/E Forms... Close

Database ID Name Location Description Item Number Description Stocking Unit Qty. On Hand Qty.

PTDEMO	Productivity Tool...	1	Central warehou...	A2(IMAGE-1500)G	Image 1500 Seri...	Ea.	18	
PTDEMO	Productivity Tool...	2	Portland Office	A2(IMAGE-1500)G	Image 1500 Seri...	Ea.	0	

PTDEMO - Shipment Margin

File Help

Margin Percent: 30.93202

Markup Percent: 44.78489

Margin Amount: 1,381.92

Close

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.

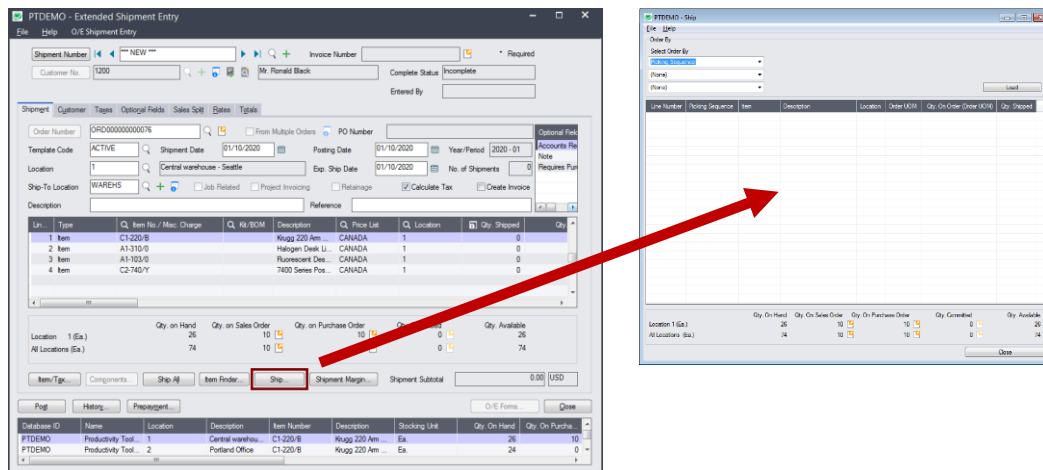
For example, the following screens show items ordered by Picking Sequence and selected by Ship-Via code.

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.

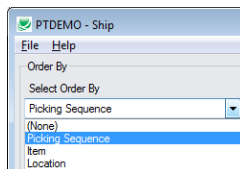
Matching and recording the entries from the picking slip is far easier when you list the items in picking sequence order.

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.



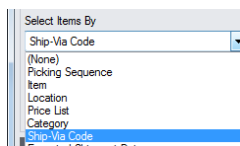
To use the Ship button to enter quantities:

- Click the Ship button to display the Ship form.
- Select the primary order for listing items.



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.



Extended Shipment Entry Shipping Quantities by Picking Sequence and Filtering Items

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).

Line Number	Picking Sequence	Item	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped	Pts
1	0010	C1-220/B	Krugg 220 Arm Tilter-Brown	1	Ea.	10	0	US
4	0023	C2-740/Y	7400 Series Posture Chair	1	Ea.	25	0	US
3	0040	A1-103/0	Fluorescent Desk Lamp	1	Ea.	8	0	US
2	0041	A1-310/0	Halogen Desk Light	1	Ea.	15	0	US

- 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.

Line Number	Picking Sequence	Item	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped
1	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	0	71
All Locations (Ea.)	231	15	4	0	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.

Serial Numbers Allocation

Item Number: A1-900/B Location: 1 Stock Date: 07/01/2020

Serials

Auto-Allocate From: Auto-Alloc

Serial Number: April-00199

Clear All

Unit of Measure: Ea.

Serial Nos. Required: Allocated: Remaining:

Finder - Inventory Serial Numbers

Find By: Show all records End Now Set Criteria

☒ Auto Search

Serial Number	Unformatted It...	Location	Status	Stock Date
April-00199	A1900B	1	Available	7/1/2020
April-00199	A1900B	1	Available	7/1/2020
April-00200	A1900B	1	Available	7/1/2020

Help Select Cancel

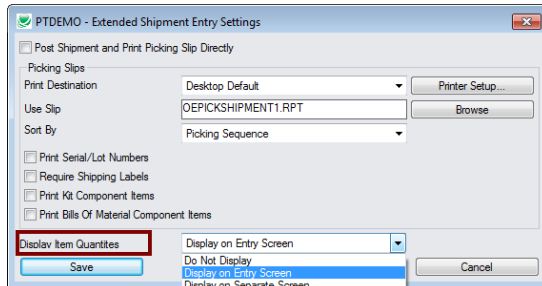
Close

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.



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

Location	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	800	0	731

Buttons: Item/Tax..., Components..., Item Finder..., Ship..., Shipment Margin..., Shipment Subtotal: 324.78 USD, Post, History..., Prepayment..., O/E Forms..., Close

- 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	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	26	10	10	0	26
All Locations (Ea.)	74	10	10	0	74

Buttons: Item/Tax..., Components..., Ship All, Item Finder..., Ship..., Shipment Margin..., Shipment Subtotal: 0.00 USD, Post, History..., Prepayment..., O/E Forms..., Close

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha...
PTDEMO	Productivity Tool...	1	Central warehou...	C1-220/B	Krugg 220 Am ...	Ea.	26	10
PTDEMO	Productivity Tool...	2	Portland Office	C1-220/B	Krugg 220 Am ...	Ea.	24	0

- 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	Qty. On Hand	Qty. On Purcha...	Qty. On Sales O...	Qty. 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

Buttons: Refresh, Close

Click the All Locations button to move the Quantities in front of other windows (if hidden).

All Locations

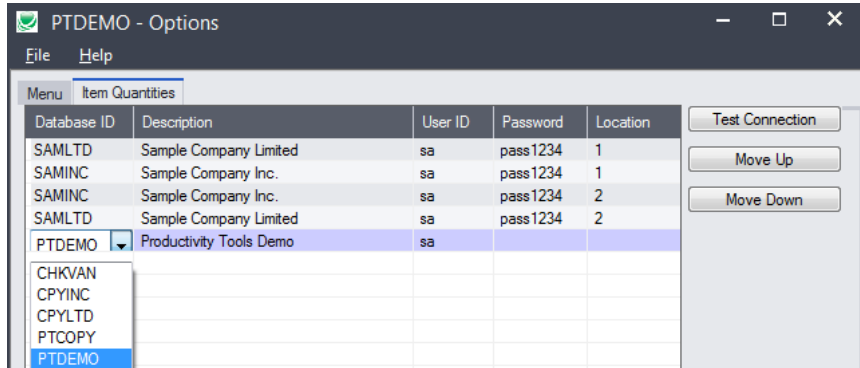
The All Locations button appears at the bottom of the Extended Shipment Entry screen if you choose to display quantities on a separate screen.

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.

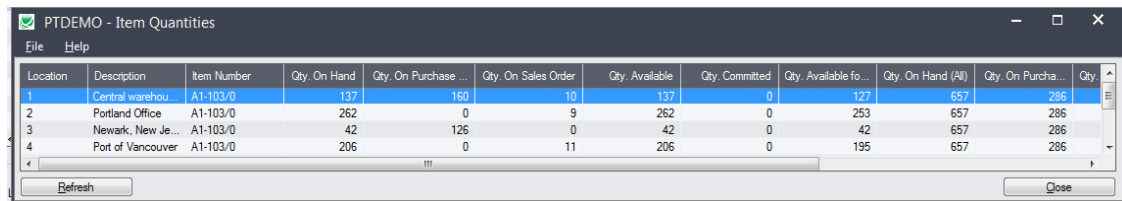


- Use the Insert and Delete keys to add or remove locations and companies from the Item Quantities grid and to change the order that locations appear.

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.



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 – [Print Picking Slips Fast](#) – for details on printing picking slips directly.

The screenshot shows the 'SAMLTD - Extended Shipment Entry' window. It contains fields for Shipment Number (SH00000000000000000002), Invoice Number (IN0000000000000002), Customer No. (1200), and Mr. Ronald Black. There are tabs for Shipment, Customer, Taxes, Optional Fields, Sales Split, Rates, and Totals. A table lists items with columns: Lin., Type, Item No./Mac. Charge, K/BOM, Description, Price List, Location, Qty. Shipped, Qty. B/O, Qty. On Order, and Shipped. At the bottom right, the 'O/E Forms...' button is highlighted with a red box.

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.

The screenshot shows the 'O/E Forms' popup window. It has fields for Order Number, Shipment Number, Invoice Number, and Shipment Number. On the right, there are buttons for 'Print Order Confirmation...', 'Print Picking Slip...', 'Print Invoice...', 'Email Packing Slip...', and '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 Packing Slips

File Help

Use Slip: OEPAKSHIPMENT1.RPT [Browse]

Sort By: Line Number

From Shipment Number: SH00000000000000000085

To Shipment Number: SH00000000000000000085

Message ID: PACKING

☐ Print Serial/Lot Numbers

☐ Print Kit Component Items

☐ Print Bills Of Material Component Items

Email To: Email Address Entered

Email: ronalblack99@hotmail.com; receiving@rblack.com

Progress

[Send] [Close]

- Select the Crystal report form for packing slips.
- 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.

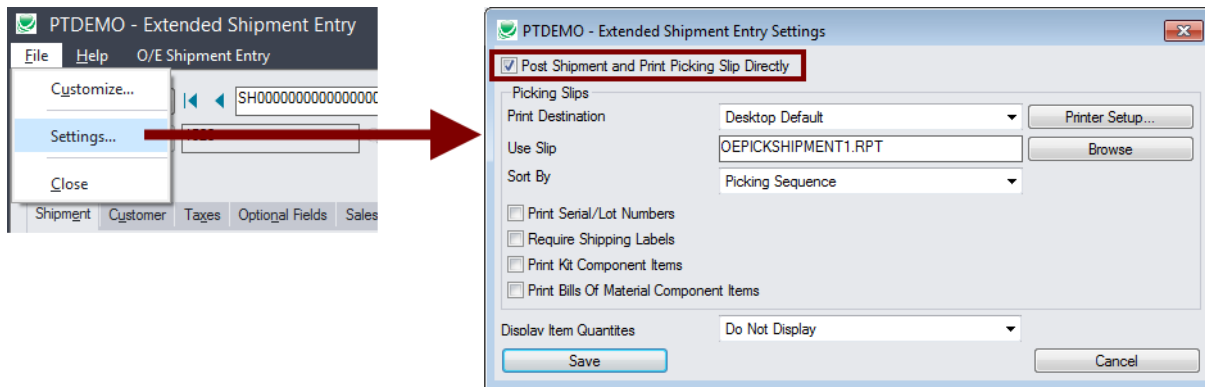
For more information on emailing packing slips, see the Email Packing Slips User Guide.

Print Picking Slips Fast

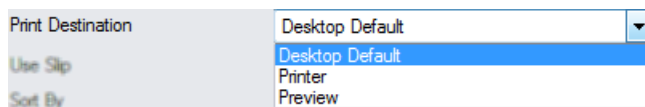
Extended Shipment Entry lets you streamline the printing of picking slips when you need to print large numbers of them as quickly as possible.

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:



- 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



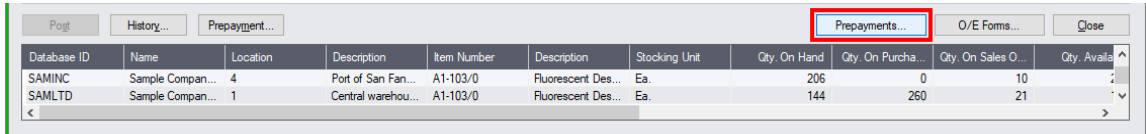
View Order and Shipment Prepayments

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.

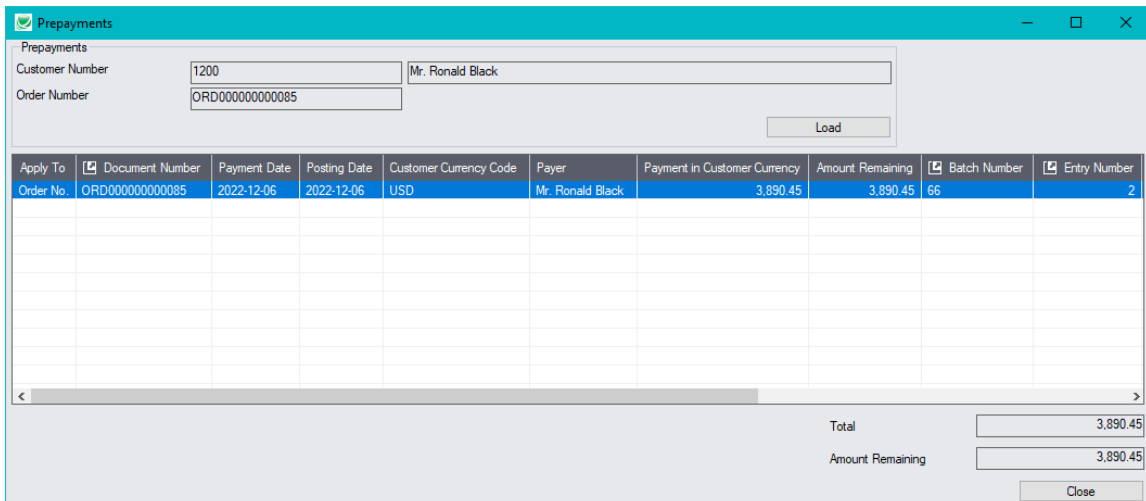
To view order and shipment prepayments:

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



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	
SAMLT	Sample Compan...	1	Central warehou...	A1-103/0	Fluorescent Des...	Ea.	144	260	21	

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



Prepayments

Customer Number: 1200 Mr. Ronald Black

Order Number: ORD0000000000085

Load

Apply To	Document Number	Payment Date	Posting Date	Customer Currency Code	Payer	Payment in Customer Currency	Amount Remaining	Batch Number	Entry Number
Order No.	ORD0000000000085	2022-12-06	2022-12-06	USD	Mr. Ronald Black	3,890.45	3,890.45	66	2

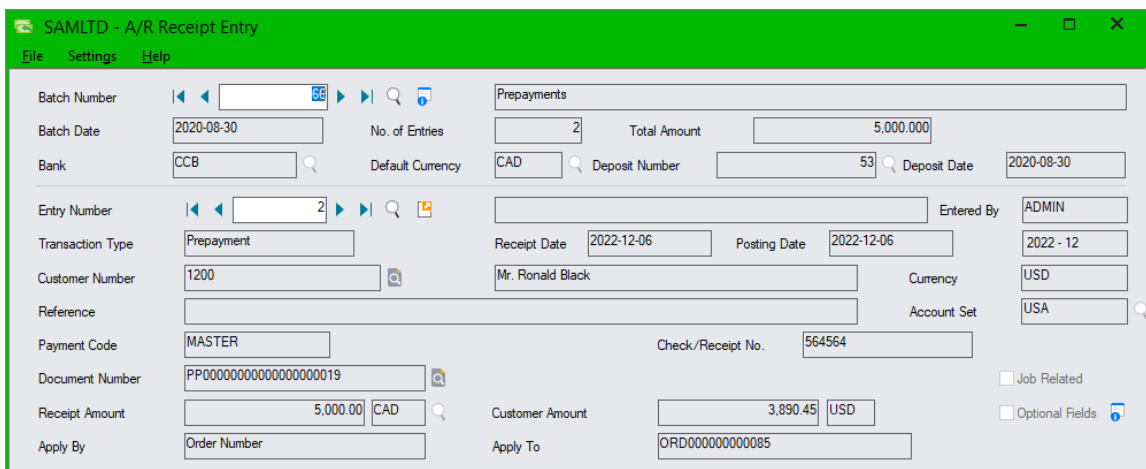
Total: 3,890.45

Amount Remaining: 3,890.45

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 Receipt Entry

File Settings Help

Batch Number: 66

Batch Date: 2020-08-30

Bank: CCB

Entry Number: 2

Transaction Type: Prepayment

Customer Number: 1200

Reference:

Payment Code: MASTER

Document Number: PP000000000000000019

Receipt Amount: 5,000.00 CAD

Apply By: Order Number

Prepayments

No. of Entries: 2

Total Amount: 5,000.00

Default Currency: CAD

Deposit Number: 53

Deposit Date: 2020-08-30

Entered By: ADMIN

Receipt Date: 2022-12-06

Posting Date: 2022-12-06

Mr. Ronald Black

Currency: USD

Account Set: USA

Check/Receipt No.: 564564

Customer Amount: 3,890.45 USD

Apply To: ORD0000000000085

Job Related

Optional Fields

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

File Help O/E Shipment Entry

Shipment Number: Invoice Number: * Required

Customer No.: Mr. Ronald Black Complete Status: Entered By:

Shipment Customer Taxes Optional Fields Sales Split Rates Totals

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

Description: Reference:

Type	Contract	Project	Category	Cost Class	Item No.	Misc. Charge
Item	120-1200-10	1009	PRCHDESK	Material	D2-613/B	
Item	120-1200-10	1009	PRCHDESK	Material		

	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

Item/Tax... Components... Item Finder... Ship... Shipment Margin... Shipment Subtotal: USD

Post History... Prepayment... O/E Forms... Close

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha...	Qty. On Sales