

TaiRox Productivity Tools - Extended Vendors User Guide

Shortcuts to Feature Descriptions in this Document:

[SmartFinder](#) Find a vendor quickly from a phone number or address.

[Enforcing Country Codes](#) At data entry time, turn this option on to force country, state and province fields to match ISO 3166 codes.

[Multiple Contacts](#) Store an unlimited number of contacts per vendor with over 10 fields of information for each contact.

[Copy Vendors](#) Copy vendors to multiple Sage 300 databases in a single operation. Insert-Only, Update-Only and Insert-and-Update operations are provided.

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SmartFinder

How do you find a vendor when you only know part of an address or a phone number? SmartFinder will search multiple columns in both vendor and remit-to tables and display all matches - just like a modern search engine. Click on the Vendor Number button as shown:

The screenshot shows the PTDEMO - Extended Vendors application window. The title bar includes the application name and standard window controls. The menu bar contains 'File', 'Help', and 'A/P Vendors'. The main interface features a search bar with a 'Vendor Number' button highlighted in red. Below the search bar is a 'Vendor Name *' field. A tabbed interface includes 'Address', 'Contact', 'Processing', 'Invoicing', 'Optional Fields', 'Statistics', 'Activity', and 'Comments'. The 'Address' tab is active, showing fields for 'Group Code *', 'Business Reg. No.', 'On Hold', 'Last Maintained', 'Inactive', 'Short Name', 'Start Date' (08/26/2016), 'Legal Name', 'City', 'Country', 'State/Prov.', 'Telephone', 'Zip/Postal Code', 'Fax', 'E-mail', and 'Web Site'. At the bottom, there are buttons for 'Add', 'Delete', 'Copy Vendors...', and 'Close'.

Google Maps will be launched when the Address button is clicked. **Your email client** will be launched when the Email button is clicked. The **Vendor Web Site** will be visited when the Web Site button is clicked.

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SmartFinder

The SmartFinder form pops-up. Suppose you remember that a vendor's name or location has something to do with "sea", but you cannot remember the name. Enter "sea" and click on the Find button. A/P vendor rows are shown in the top grid and A/P remit-to locations are shown on the bottom grid. You can see that many columns in the database tables are searched simultaneously.

Select a row in the vendor grid or remit-to grid and that vendor will be selected and you will be returned to the main entry form.

Using multiple words in the search? Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".

Searching for a phone number? Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find entries "(451) 555-8991" as well as "(408) 451-8991".

| Vendor Number | Status | Vendor Name | Short Name | Address Lin... | Address Line 2 | Address Line 3 | Address Line 4 |
|---------------|--------|-------------------|------------|-------------------|----------------|----------------|----------------|
| 4030 | Active | Megatronix Res... | MEGA | 1215 East 13th... | | | |

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

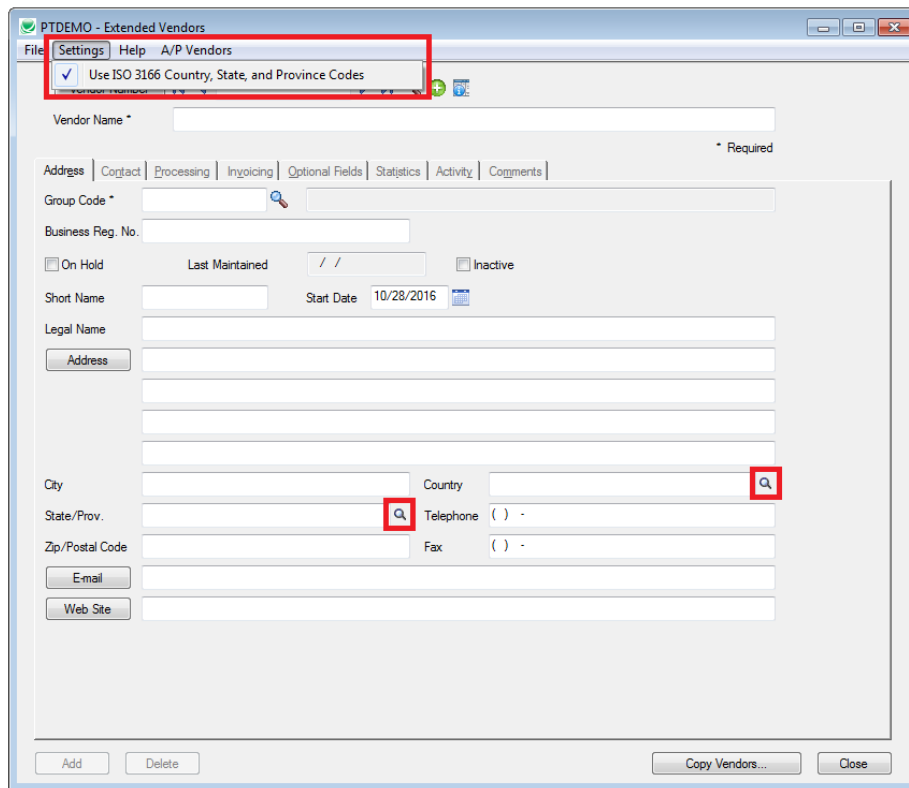
Google Maps is launched with the selected address when you click on the right-arrow icon:

OR

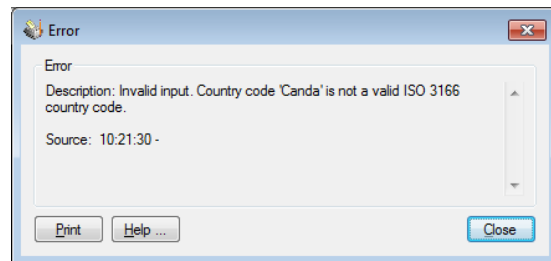
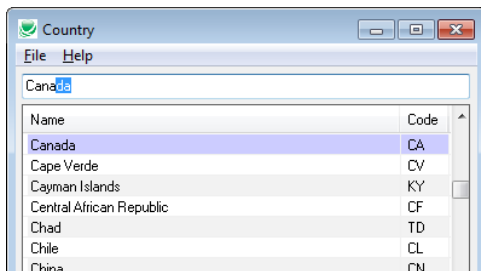
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Enforcing Country Codes

There may be a requirement that address data stored in Sage 300 have valid Country, State and Province codes. For example, the Sage 300 data may feed into shipping software. A setting, which can only be changed by the Sage 300 ADMIN, controls the enforcement of codes. When enforcement is turned on, finders will appear next to Country and State/Prov fields and when data is to be saved, a message will appear if the codes are not valid and the codes must be fixed.



The finder and a sample error message are shown here:



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Multiple Contacts

Extended Vendors extends the functionality of Sage 300 Vendors by allowing you to store multiple contacts per vendor.

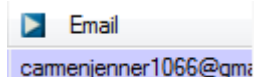
Sage 300 Accounts Payable only stores a single contact for each vendor. Extended Vendors allows you to store as many as you require, by adding a list of contacts to the Contact tab of the UI. Additionally, Sage 300 only stores the contact's name, phone number, fax number, and e-mail address for the one contact. Extended Vendors stores the following information for each contact:

- First and Last Name
- Title (Mr, Ms, Dr, etc)
- Position (VP Sales, etc)
- 3 Phone Numbers (Office, Mobile, Other)
- Email Address
- Notes (up to 250 characters)
- Inactive and Date Made Inactive
- Date Last Maintained and Last Changed By (Sage 300 User)

A Sage 300 grid is displayed below the normal contact information. Any number of rows can be entered into the grid and saved for future reference.

| Last Name | First Name | Title | Position | Phone (Mobile) | Phone (Office) | Phone (O... | Email | Notes | Inactive | Date Inact... | Date Last M... | Last Ch... |
|-----------|------------|-------|------------|----------------|----------------|-------------|-----------------|----------------------|----------|---------------|----------------|------------|
| Jenner | Carmen | Ms | CFO | (604) 629-0223 | (604) 805-1871 | | carmenjenner... | Get approval if o... | No | | 3/15/2013 | ADMIN |
| White | Barry | Mr | Controller | (604) 629-0223 | | | does not use | @RealBarryWhite | No | | 3/15/2013 | ADMIN |

Your email client is launched with the selected address when you click on the right-arrow icon:



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Copy Vendors

Summary: Extended Vendors provides a mechanism for maintaining vendors across multiple companies - for Sage 300. Access is through a Copy Vendors button that has been added to the core A/P Vendors window. Vendors and companies can be filtered and "cherry-picked". Sophisticated error-checking protects against inconsistent multi-currency operations. A full log of changed vendors is maintained.

Extended Vendors operates from within an existing ("source") company. When the Copy Vendors button is pressed, a window will pop up that allows filtering of vendors in that source company. The filtered vendors will be shown and can be selected or de-selected on an individual basis.

Pressing the Copy button on the pop-up window pop-ups up a list of ("target") companies to which those vendors can be copied. The companies can be selected or de-selected on an individual basis. Extended Vendors remembers the previously selected companies as a way to assist with the process. The operation to be performed (Insert Only, Update Only, Insert and Update) should be selected. Pressing the OK button will start the copy operation, first asking for the ADMIN user's password. This password entry provides a security checkpoint and insures that there will be sufficient rights to complete the operation. When the copy is complete the log may be reviewed by pressing the Log button.

Sage 300 business objects are used to perform the copying. Illegal copy operations are therefore blocked and errors placed in the log file. For example, it is illegal to update a multi-currency vendor from a single-currency vendor. When no changes are required for a selected vendor, there is no update performed - so the audit stamp is preserved.

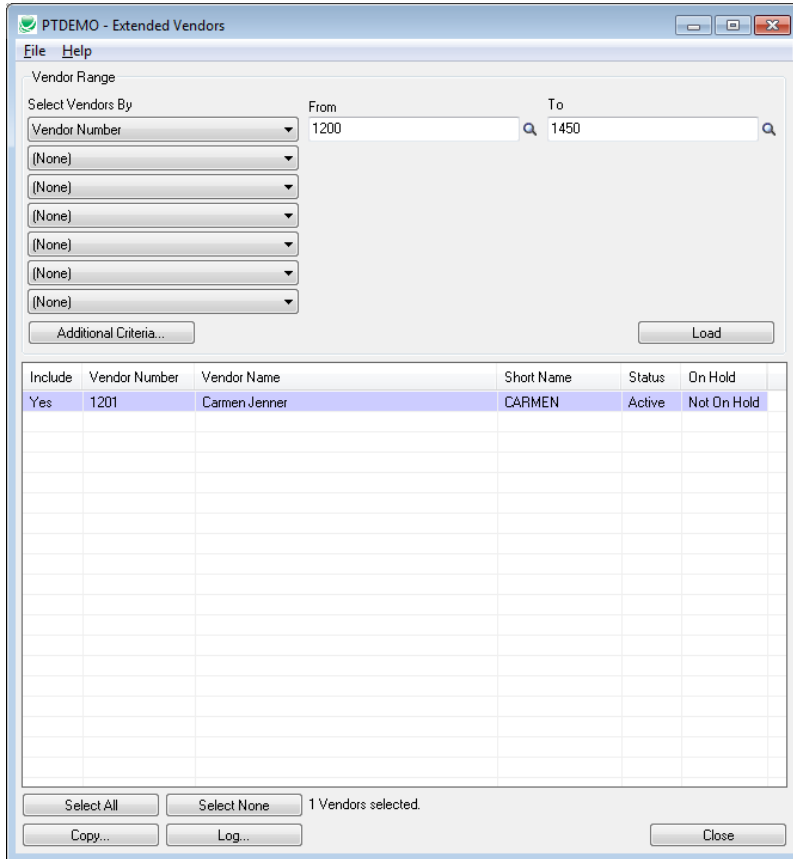
Suppose, as illustrated here, that a new vendor has just been added using normal functionality.

The screenshot shows a software window titled "PTDEMO - Extended Vendors" with a menu bar containing "File", "Help", and "A/P Vendors". The main area displays vendor information for Vendor Number 1201, Vendor Name "Carmen Jenner", and Group Code "INV" (Inventory Purchases). The "Address" tab is selected, showing the address "927 Warehouse Drive" in Kansas City, MO, USA. Other fields include "Last Maintained" (08/26/2016), "Start Date" (08/26/2016), "Telephone" ((816) 555-3341), and "Fax" ((816) 555-3340). The "E-mail" is "info@carmenjennerus.com" and the "Web Site" is "www.carmenjennerus.com". At the bottom, there are buttons for "Save", "Delete", "Copy Vendors...", and "Close".

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Copy Vendors

When the Copy Vendors button is pressed, the following pop-up window is displayed. Note that vendors that have just been added or modified will be displayed in the grid - in our illustration, the new vendor is displayed. This can be cleared by clicking on File / Clear List of Vendors Changed This Session.

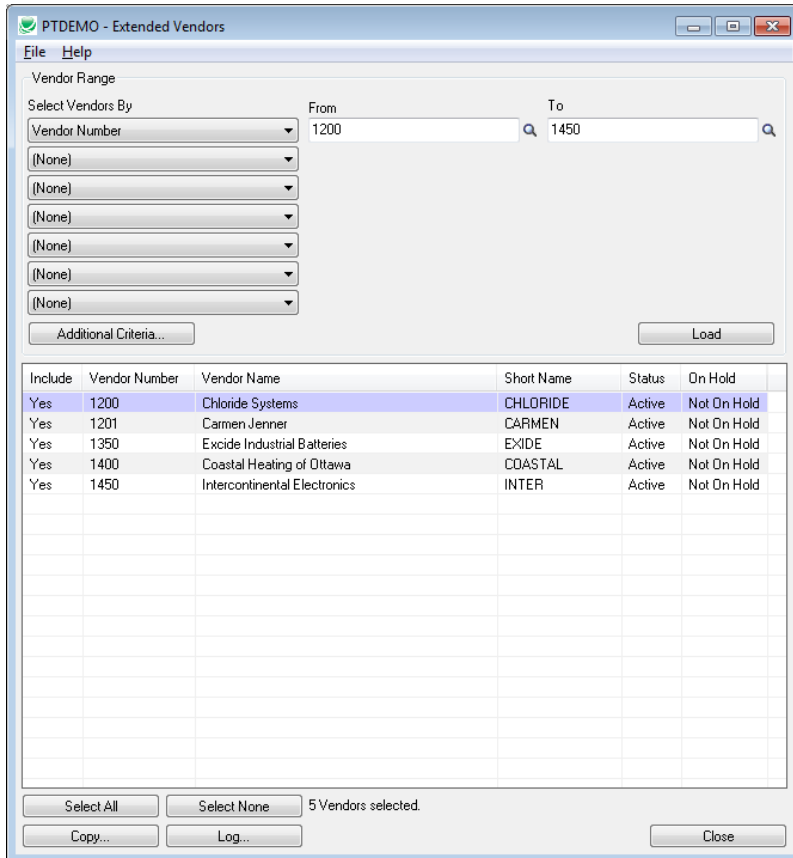


Rather than copying the newly entered vendors, any set of vendors can be added using up to 7 filters. The filters most recently used are remembered as user settings - here a range of vendors. Pressing the Load button will perform the filtering of vendors.

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Copy Vendors

When the Load button is pressed, the screen refreshes with the filtered data. The vendors can then be selected or de-selected on an individual basis by double-clicking on the first column.

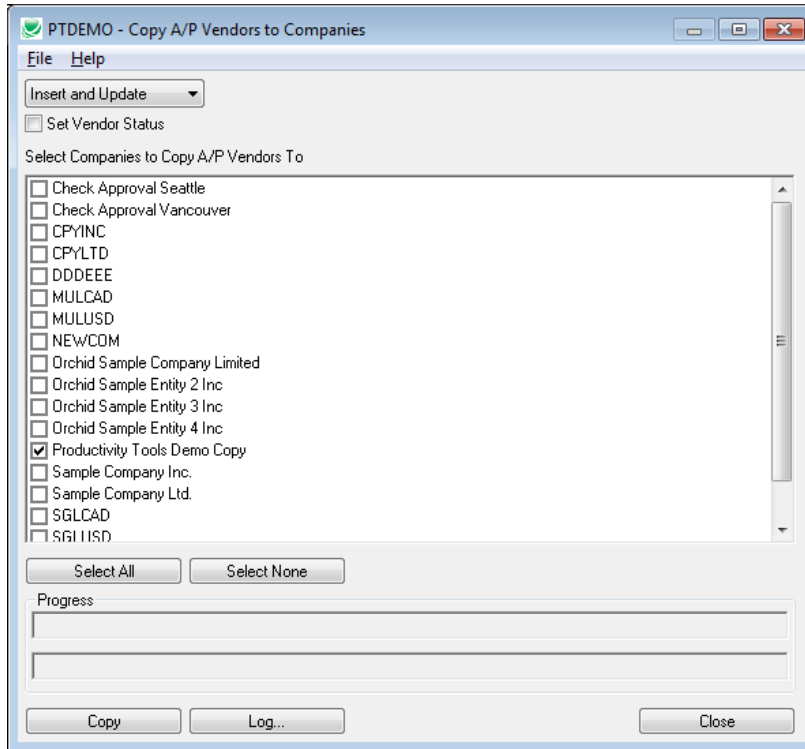


Pressing the Copy button will continue to the next step - selecting companies.

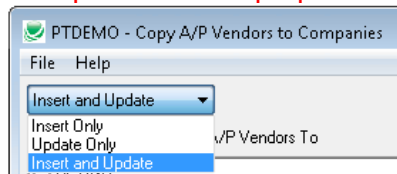
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Copy Vendors

When the Copy button is pressed, the following pop-up window is displayed. The companies can then be selected or de-selected on an individual basis. A checkbox controls whether or not a vendor's status will be copied. An inactive vendor can always be made active in another company. If an active vendor is to be made inactive, this may not be possible in other companies - in which case other information will be copied, the status change failure will be logged and processing of other vendors will continue.



Important Note: Select the operation from a drop-down menu at the top of the window. An additional checkbox appears when "Update Only" is selected so that the simple operation - changing a vendor's name - can be performed whether other properties match or not. **Except for the special case of changing the name only, an update operation will attempt to change the vendor in the target company to be just like the vendor in the source company. In order to do so, various properties (such as Optional Fields and Optional Transaction Fields) are deleted from the target vendor and then properties from the source vendor are added. This may cause the update to fail if properties don't match or are in use.**



Operation to be performed:

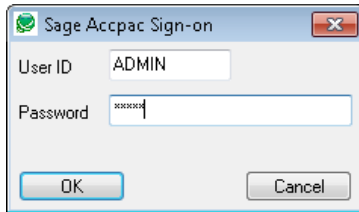
- Insert Only operation will only add vendors, if the vendor does not already exist.
- Update Only operation will only update vendors that do exist.
- Insert and Update will perform both of these operations.

Pressing the OK button will continue to the next step - entering credentials.

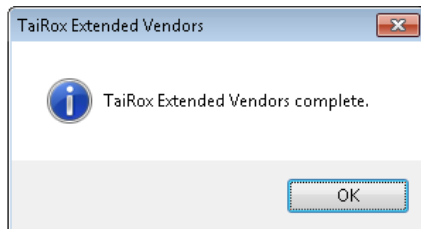
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Copy Vendors

After pressing OK, you will be asked for a User Id and Password. Make sure the user has sufficient rights to complete the operation. Before continuing, you should check that a current backup exists for the databases being affected or that the operation being requested is limited in nature.



Progress will be displayed as the operation proceeds. Progress will be displayed and eventually the completion of the operation will be signaled by this window:



The operation can be cancelled - if it is cancelled the operations contemplated will be partially complete and an assessment of the situation may be required before further work is done.

A log of operations performed (or not performed) is available from the Log button.

