

Extended Vendors

Extended Vendors is an enhanced replacement for the Sage Vendors form. It provides you with more information while entering a PO and fast access to additional PO, Vendor, and Item information.

Extended Vendors lets you:

- Maintain vendors across multiple Sage 300 companies using the Copy Vendors functionality.
 - Specify a range of vendors from the current company, filter them by additional criteria, cherry-pick vendors from the results, and then copy the final set to other associated Sage 300 companies.
 - Select or de-select companies to copy to on an individual basis.
 - Display a full log of copied vendors.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes.
- Add an unlimited number of contacts per vendor with over 10 fields of information for each contact.
- Display Vendor addresses in Google maps.
- Create new emails for the Vendor and Contact email addresses.
- Display Vendor web sites in a browser.

The following pictures show the extra buttons on the Extended Vendors screen:

Sage A/P Vendors screen

TaiRox Extended Vendors screen

Click the following links for details on each Extended Vendors feature:

[SmartFinder – Vendors](#) Find a vendor quickly from a name, description, phone number or address.

[Vendor Inquiry](#) (button left of the vendor name field) Display complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

[Address Lookup](#) Display address location in Google Maps.

[E-mail Creation](#) Launch your email client to create an email for this vendor.

[Web Site Lookup](#) Launch your browser with the vendor's website URL.

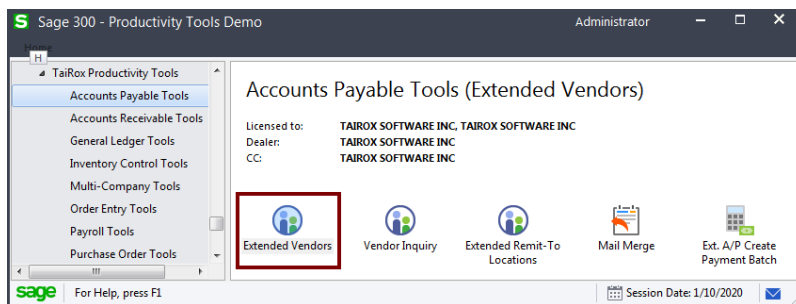
[Enforce ISO 3166 Country Codes](#) Turn on this option to force country, state and province fields to match ISO 3166 codes.

[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.

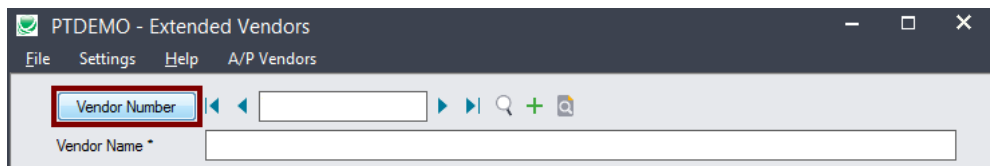
Using Extended Vendors

The Extended Vendors icon appears under **TaiRox Productivity Tools > Accounts Payable Tools** on the Sage 300 desktop and can be copied to other menu locations.



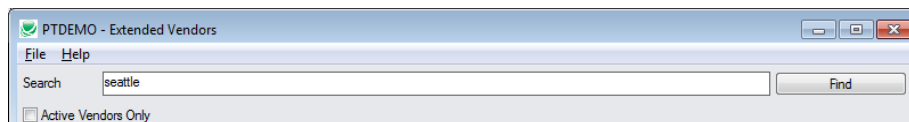
SmartFinder – Vendors

Click the Vendor Number button at the top of the form to open the SmartFinder for searching vendors.



Search:

- Enter one or more words or word fragments in the search entry field to search multiple tables and fields.



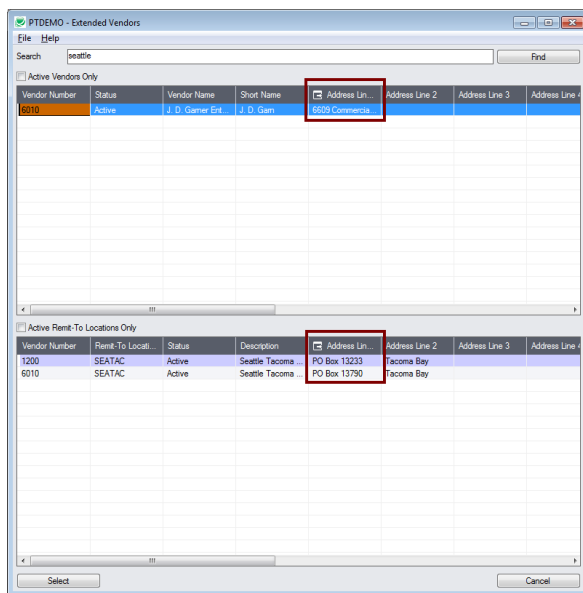
- You can also filter for Active vendors.
- Search returns vendors and remit-to location records which contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may have it in the address field. Both records will be displayed.
 - **Using 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 Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the vendors matching the search criteria.
 - The bottom grid displays the remit-to locations that match the search criteria.
- Note that the remit-to locations *may not* be related to the vendor records displayed in the top part of the screen. The screen below displays remit-to locations for two different vendors.
- 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.



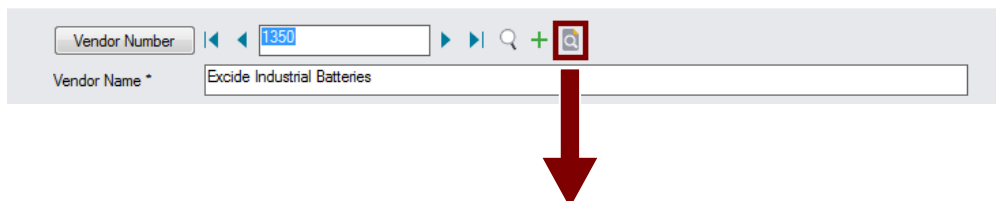
Selection:

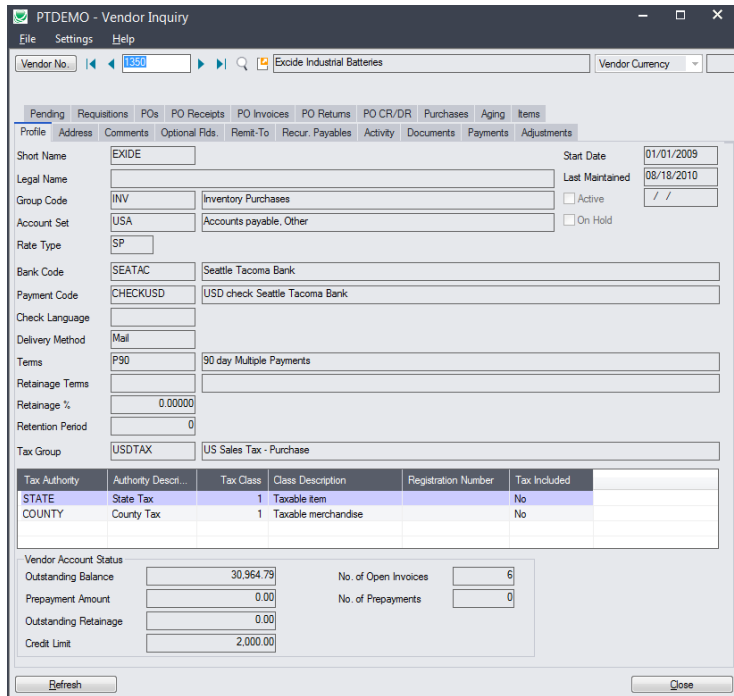
- Double-click a vendor in the top grid to select and enter the vendor on the Extended Vendors form.
- Double-click a remit-to location in the bottom grid to enter the vendor.

Vendor Inquiry

Vendor Inquiry button displays the TaiRox Productivity Tools Vendor Inquiry screen – a convenient way to view data related to the vendor. Each tab focuses on an aspect of the vendor’s data.

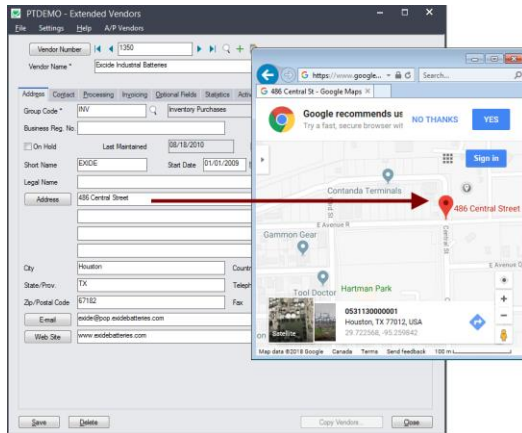
You can also look up details for other vendors while you are on this screen.





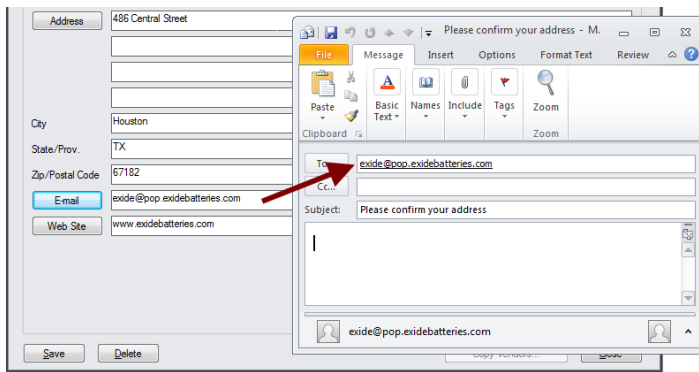
Look up addresses in Google maps

- Click the Address button on the Extended Vendors screen to confirm locations.



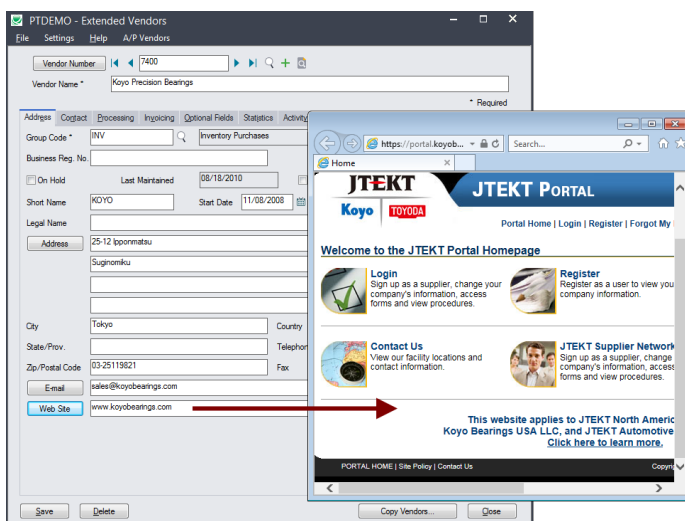
Launch emails for vendors and vendor contact email addresses

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



Look up Web sites in your browser

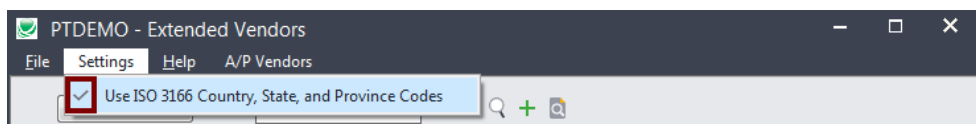
- Click the Web Site button on the Extended Vendors screen to confirm Web site URLs.



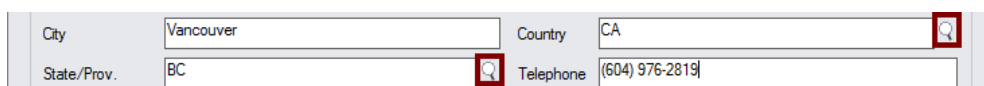
Enforce ISO 3166 country codes

Use this option to force country, state and province codes to match ISO 3166 codes, and to use Finders to select country, state, and province codes.

- This setting can only be changed by the Sage 300 ADMIN.
- Choose Settings from the Extended Vendors menu.



- If you want to use this option, make sure it displays the checkmark.
- The program will also display new Finder buttons to let you select ISO country, state, and province codes from Finder lists.



- An error message will appear when you click Save if the codes are not valid. You must fix them before you can save the vendor record.

Maintain an unlimited number of contacts per vendor

Extended Vendors lets you store an unlimited number of contacts per vendor with over 10 fields of information for each contact.

Sage 300 Accounts Payable only stores a single contact for each vendor and only stores the contact's name, phone number, fax number, and e-mail address for the one contact.

By contract, Extended Vendors allows you to store as many as you require, by providing a list of contacts to the Contact tab of the UI, and it stores the following information for each vendor:

- 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)

To add more vendor contacts:

- Select the Contact tab on the Extended Vendors form.
- Click in the grid below the contact fields, and press the insert key.

The screenshot shows the 'Contact' tab of the Extended Vendors form. The contact name is 'Mrs. Beth Nishumura Anderson'. Below the name are fields for Telephone, Fax, and E-mail (bethanderson@koyobearings.com). At the bottom, there is a table of contacts:

Last Name	First Name	Title	Position	Phone (Mobile)	Phone (Office)	Phone (Other)
Jenner	Camen	Ms	Sales Manager	(778) 926-8175	(673) 978-3726	
Keller	Frank	Mr	Salesperson	(778) 432-8292	(673) 987-3029	

- Add the information for each new contact.
- Click the Email heading to create a new email to the contact.

This is a close-up of the contact table from the previous image. The 'Email' column header is highlighted with a red box. The data rows are:

Office	Phone (Other)	Email	Notes	Inactive	Date Inactive	Date Last Maintained
9-3726		camerj@mail.c...		No		
7-3029		frankk@mail.com		No		

Copy Vendors to other Sage 300 companies

IMPORTANT:

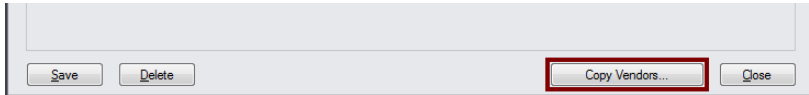
You must enter a User ID and Password to copy vendors. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new vendors in other companies, check that a current backup exists for the databases being affected.

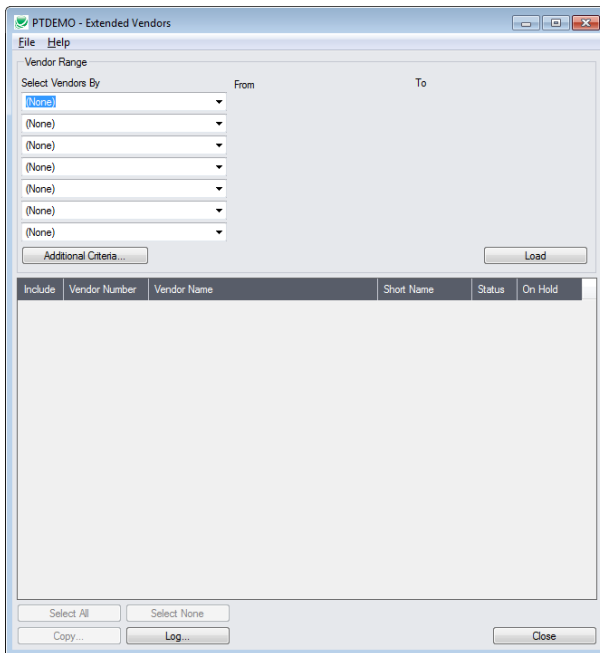
Note: You cannot copy vendors between single-currency and multicurrency companies. Source and target companies must have the same single-currency or multicurrency setting.

- Open the Sage 300 company with the vendors that you want to copy.
 - Copy Vendors operates from within an existing "source" company, and lets you copy ship-via information to other Sage 300 company databases.

- Open the Extended Vendors form, and click the Copy Vendors button at the bottom of the screen.



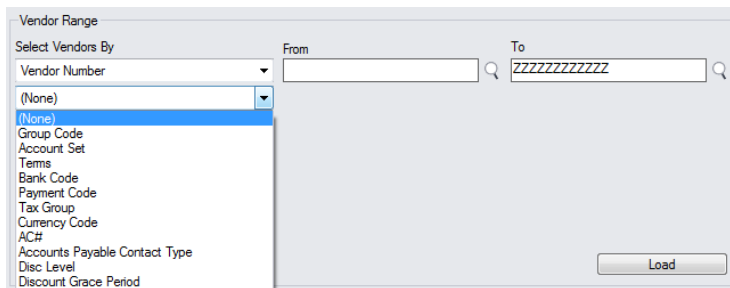
When the Copy Vendors button is pressed, a window will pop up for selecting the vendors in the source company.



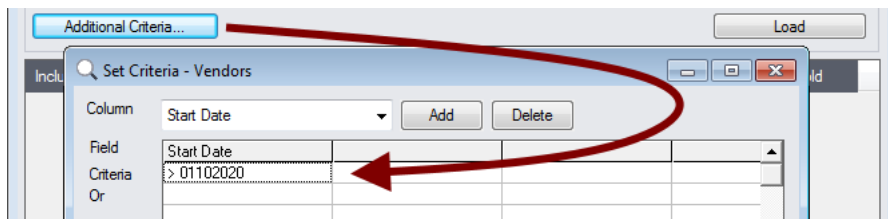
Note: By default, the grid at the bottom of the form will display any new vendors that were added in this session. This allows you to bypass the selection process and copy these new vendors directly to other Sage company databases.

Specify a range of vendors for copying:

You can specify ranges for up to seven vendor fields to use for vendor selection – including the vendor number, group code, account set, terms, bank code, payment code, tax group, currency code, or any of the optional fields that you use for vendors.



Choose additional criteria:



- Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting vendors that were added after a particular date. Click OK to save.

Load the list of vendors and choose which ones to copy:



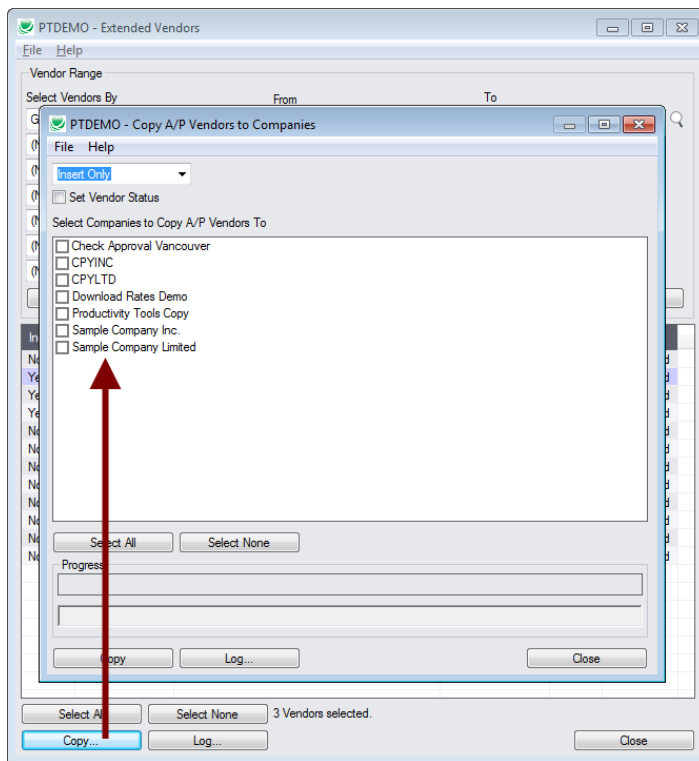
- Click the Load button to display the list of vendors.
When the Load button is pressed, the program will display the vendors in the range and with the additional criteria you specified.
 - You can adjust the range or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the vendors loaded in the grid.



- Double-click in the Include column to “cherry-pick” vendors:

Include	Vendor Number	Vendor Name	Short Name	Status	On Hold
No	1400	Coastal Heating of Ottawa	COASTAL	Active	Not On Hold
Yes	1755	Eastern Sand Shore Enterprise	EASTERN	Active	Not On Hold
Yes	1890	Raeside Equipment Ltd.	RAESIDE	Active	Not On Hold
Yes	2300	Torrington Ltd.	TORR	Active	Not On Hold

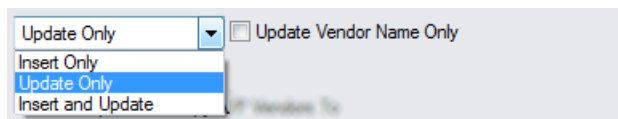
Click the Copy button to display the To Companies screen:



Select whether to insert new codes or update existing ones in target companies:

Before proceeding, you must decide whether to add or update vendors in the target companies.

For example, choose Update Only to update addresses and contact information for all existing vendors in the target companies.



- Choose whether to insert, insert and update, or just update vendors.
 - Insert Only will only add codes if the code does not already exist.
 - Update Only will only update codes that do exist.
 - Insert and Update will perform both of these operations.
- If updating codes only, you can choose to update the vendor name only.

Choose whether to set the Vendor Status:

Select whether to copy vendors' statuses.



- Inactive vendor can always be made active in another company.

- It may not be possible to make an active vendor inactive in the target company – in which case, other information will be copied, but the status change failure will be logged and the program will continue to process other vendors.

Select target Sage companies:

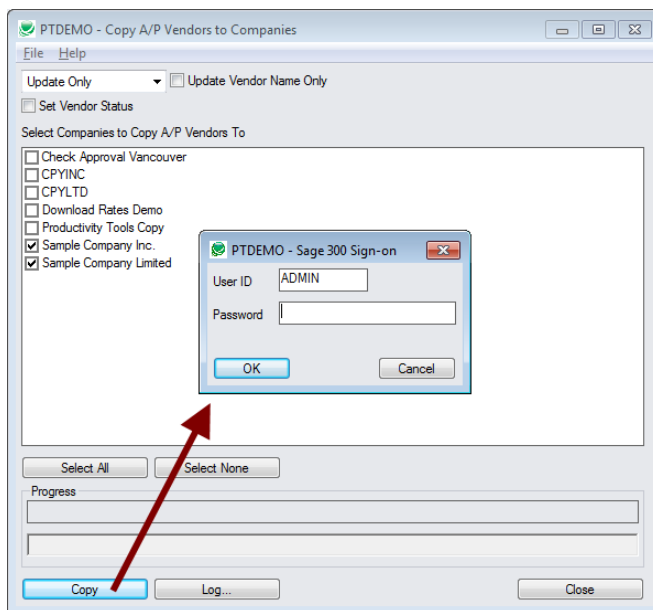
<input type="checkbox"/>	Check Approval Vancouver
<input type="checkbox"/>	CPYINC
<input type="checkbox"/>	CPYLTD
<input type="checkbox"/>	Download Rates Demo
<input type="checkbox"/>	Productivity Tools Copy
<input checked="" type="checkbox"/>	Sample Company Inc.
<input checked="" type="checkbox"/>	Sample Company Limited

- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the target companies.

Select All	Select None
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- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy vendors:



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

Note: You MUST have sufficient permissions to update vendors in the target companies for copying to proceed.
- The program will copy the vendors to the target companies.
- If no changes are required for a selected vendor, the record will not be updated – so the audit stamp will be preserved.

Click the Log button to confirm which vendors were processed:

```
8/7/2020 12:37:40 PM Copy A/P Vendors to Companies started.
8/7/2020 12:37:40 PM
8/7/2020 12:37:40 PM Performed by user: ADMIN
8/7/2020 12:37:40 PM
```

```

8/7/2020 12:37:40 PM Update Only
8/7/2020 12:37:40 PM Update Vendor Name Only: No
8/7/2020 12:37:40 PM Copy A/P Vendors to Companies: Sample Company Limited
8/7/2020 12:37:40 PM
8/7/2020 12:37:40 PM Copying vendors from Productivity Tools Demo to Sample Company Limited
started.
8/7/2020 12:37:40 PM      Logging in to Sample Company Limited...
8/7/2020 12:37:40 PM      Updating vendor 1755...
8/7/2020 12:37:41 PM          Vendor updated.
8/7/2020 12:37:41 PM      Updating vendor 1890...
8/7/2020 12:37:41 PM          Vendor updated.
8/7/2020 12:37:41 PM      Updating vendor 2300...
8/7/2020 12:37:41 PM          Vendor updated.
8/7/2020 12:37:41 PM      Logging off of Sample Company Limited...
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM      There was 3 vendors updated.
8/7/2020 12:37:41 PM Copying vendors from Productivity Tools Demo to Sample Company Limited
complete.
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM Copy A/P Vendors to Companies complete.
8/7/2020 12:37:41 PM
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```

The Log lists:

- The user and the type of operation performed.
- Each vendor that was processed and whether the records were updated.