



Productivity Tools

User Guide

Important Notice

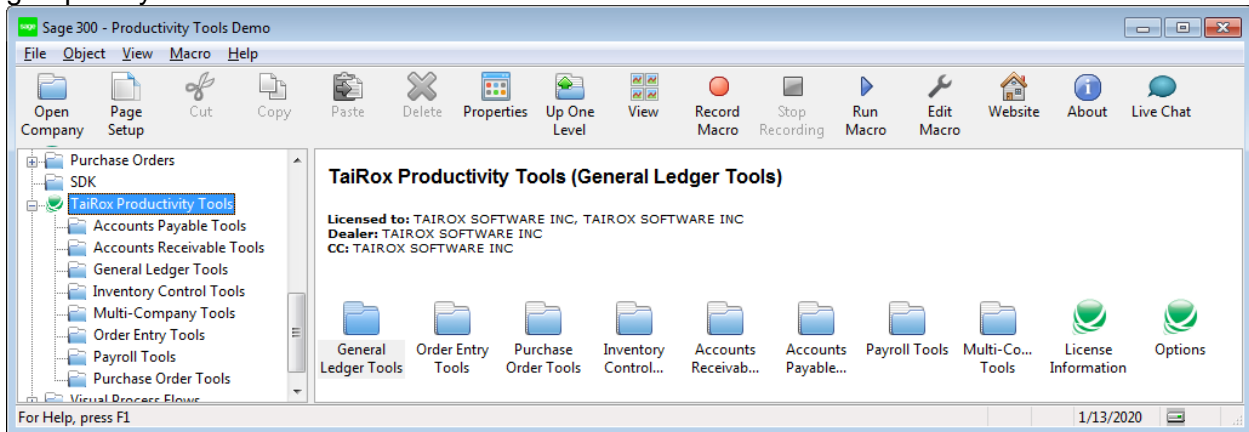
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TaiRox Productivity Tools User Guide

Summary and Overview

TaiRox Productivity Tools extend the core functionality of Sage 300. It is written as an "SDK Application", integrating seamlessly with the desktop, activation and security features of Sage 300. The tools operate on the standard "entities" of an accounting system - accounts, customers, vendors, orders, purchase orders, and so on.

Summary, Overview and How-to-Run documentation is provided in individual user guides. To see an individual user guide, Ctrl+Click on the hyperlinks in this document. The tools are grouped by module as shown here:



By-module groups are listed set out below. A special group, Multi-Company Tools, is a collection of all tools that copy entities from one company to many.

General Ledger Tools	Specific Benefits
Extended G/L Accounts	Copies accounts, changing segments, from one company to many, including many options to filter, log changes, increase speed & safety. One "master company" is required for each functional currency in use.
Extended G/L Segment Codes	Copies Segment Codes from one company to many
Extended G/L Account Groups	Copies Account Groups from one company to many
Accounting Status	Shows period-end status with drill-down in a single window
Extended Fiscal Calendar	Copies calendars from one company to many. Supports per-module locking.
Extended Create New Year	Creates a new year in multiple companies
Set Recurring Dates	Resets incorrectly entered last-run-dates
User Management	Copies permissions and setup from one user to another

Payroll Tools	Specific Benefits
Sync Timecards	Synchronizes timecard data with updated master table entries. Includes many options to filter employees, logs all changes.
Mail Merge	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.

TaiRox Productivity Tools User Guide

Accounts Receivable Tools	Specific Benefits
<u>Extended Customers</u>	Copies customers from one company to many. Maintains multiple contacts per customer. Includes many options to filter, log changes, increase speed & safety. SmartFinder searches for customers like an internet search engine. Will optionally enforce Country, State and Province codes.
<u>Apply Documents</u>	Matches and applies unapplied documents to invoices. Supports manual and auto-apply matching. A payment grid & an invoice grid maximize visibility. Automated matches can be overridden manually with one click.
<u>Extended Customer Inquiry</u>	Adds SmartFinders, Google Map integration, multiple contacts and other functionality to Customer Inquiry. SmartFinder searches for vendors like an internet search engine.
<u>Mass Billing</u>	Creates a large number of invoices for a single A/R item. Includes many options to annotate invoice batches, logs all changes.
<u>Mail Merge</u>	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.
<u>Extended Ship-To Locations</u> <u>Extended Ship-To Location</u>	SmartFinder searches for customers like an internet search engine. Will optionally enforce Country, State and Province codes.

Accounts Payable Tools	Specific Benefits
<u>Extended Vendors</u>	Copies vendors from one company to many. Maintains multiple contacts per vendor. SmartFinder searches for vendors like an internet search engine. Will optionally enforce Country, State and Province codes.
<u>Vendor Inquiry</u>	Adds 20 dynamic tabs of information for managing purchases. SmartFinder searches for vendors like an internet search engine. Vendor Document Inquiry adds 7 additional tabs of information about vendor documents and is launched from Vendor Inquiry.
<u>Extended Create Payment Batch</u>	Enables more than one system generated batch to be unposted.
<u>Mail Merge</u>	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.
<u>Extended Remit-To Locations</u> <u>Extended Remit-To Location</u>	SmartFinder searches for vendors like an internet search engine. Will optionally enforce Country, State and Province codes.

TaiRox Productivity Tools User Guide

Inventory Control Tools	Specific Benefits
<u>Extended Inventory Items</u>	Copies items, changing segments, from one company to many. Includes many options to filter, log changes, increase speed & safety. An Item In Use button will show all table references to an item. SmartFinder searches for items like an internet search engine.
<u>Extended IC Segment Codes</u>	Copy segment codes from one company to many
<u>Extended Vendor Details</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Customer Details</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Manufacturer Items</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Item Pricing</u>	Copies prices from one company to many. SmartFinder searches for items like an internet search engine.
<u>Extended Locations</u>	Copies Locations from one company to many and provides links to Google Maps and email clients.
<u>Stock Reorder</u>	Performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions.
<u>Mail Merge</u>	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.
<u>Delete Items</u>	Provides a way to see all inventory items that are safe to delete. Checks for known third party references to items. Deletes items when safe to delete.
<u>Fix Item Valuation Errors</u>	Repairs specific item valuation errors in your data

TaiRox Productivity Tools User Guide

Order Entry Tools	Specific Benefits
Extended Order Entry	An enhanced item finder shows prices, quantities and comments. Print picking slips, invoices, quotes & confirmations from entry form. Edit kit details without creating hundreds of kit numbers in inventory control. Add or delete a few items from a base kit, edit quantities and more. While viewing history, selects line details from previous orders. A ship button displays picked items in picking slip order. SmartFinder searches for orders, customers and items like an internet search engine. The entry grid shows margins and most recent costs.
Extended Shipment Entry	Shows prices, quantities and comments when selecting items. A ship button displays picked items in picking slip order. Settings enable quick printing of picking slips without showing intermediate windows. SmartFinder searches for shipments, customers and items like an internet search engine. The entry grid shows margins and most recent costs.
Extended Ship-Via Codes	Copies Ship-Via Codes from one company to many and provides links to Google Maps and email clients.
Ship Orders	Ships hundreds of orders, optionally invoicing at the same time.
Invoice Shipments	Invoices hundreds of shipments
Update Orders	Updates BOMs, kits or items for hundreds of orders. Updates prices from price lists for hundreds of orders. Updates expected ship dates for hundreds of orders.
Update Shipments	Updates prices or ship dates for hundreds of shipments.
Delete Orders	Deletes old orders to correct item quantities and speeds up day-end.
Delete Quotes	Deletes thousands of old quotes and speeds up day-end.
Complete Orders	Completes old orders that will never be filled, correcting quantities.
Sales History Inquiry	Quickly find most recent costs and prices for an item.

TaiRox Productivity Tools User Guide

Purchase Order Tools	Specific Benefits
Extended PO Entry	Shows item quantity information just like on the order entry screen. While viewing history, selects line details from previous POs. SmartFinder searches for POs, vendors and items like an internet search engine.
Extended PO Receipt Entry	Shows item quantity information just like on the order entry screen. A receive button displays items on the PO in several different sort orders. Drop ship to dozens of detail lines in a single operation. Display quantities available at other locations or in other companies while entering a receipt. SmartFinder searches for receipts, vendors and items like an internet search engine.
Extended PO Invoice Entry	Show all receipts related to a vendor so that they may be quickly matched to an invoice. A vendor is related to a receipt if they are the primary vendor or an additional cost vendor. SmartFinder searches for invoices, vendors and receipts like an internet search engine.
Stock Reorder	Performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions.
Update Purchase Orders	Updates vendor costs for hundreds of purchase orders. Updates expected arrival dates for hundreds of purchase orders.
Delete Purchase Orders	Deletes old purchase orders to correct item quantities
Complete Purchase Orders	Completes old purchase orders, correcting item quantities
Complete Zero Receipts	Finds and completes purchase order receipts with zero cost

Multi-Company Tools	Specific Benefits
Extended G/L Accounts	Copies accounts, changing segments, from one company to many, including many options to filter, log changes, increase speed & safety. One "master company" is required for each functional currency in use.
Extended G/L Segment Codes	Copies Segment Codes from one company to many
Extended G/L Account Groups	Copy Account Groups from one company to many
Extended Create New Year	Create a new year in multiple companies
Extended Fiscal Calendar	Copies calendars from one company to many. Supports per-module locking.
Extended Customers	Copies customers from one company to many. Maintains multiple contacts per customer. Includes many options to filter, log changes, increase speed & safety. SmartFinder searches for customers like an internet search engine.
Extended Vendors	Copies vendors from one company to many. Maintains multiple contacts per vendor. SmartFinder searches for vendors like an internet search engine.
Extended Inventory Items	Copies items, changing segments, from one company to many. Includes many options to filter, log changes, increase speed & safety. An Item In Use button will show all table references to an item. SmartFinder searches for items like an internet search engine.
Extended IC Segment Codes	Copy segment codes from one company to many