Extended Order Entry

Productivity Tools' Web Screen customizations add several enhancements to the standard Sage 300 Order Entry Web Screen.

- SmartFinders to find orders, customers, and ship-to locations fast.

  Productivity Tools SmartFinders work like Internet search engines – automatically matching the search strings to multiple fields in the Sage 300 order, customer, and ship-to location records.

- Customer optional fields on the Order Entry Customer tab.

  You can customize the list of optional fields displayed in Order Entry using the Options program for Productivity Tools on the Sage 300 Desktop.

- Option to require PO numbers on orders for all or selected customers.

  You select the setting for requiring PO numbers in the Options program for Productivity Tools on the Sage 300 Desktop. You can also select a customer optional field to specify which customers require PO numbers on all orders.

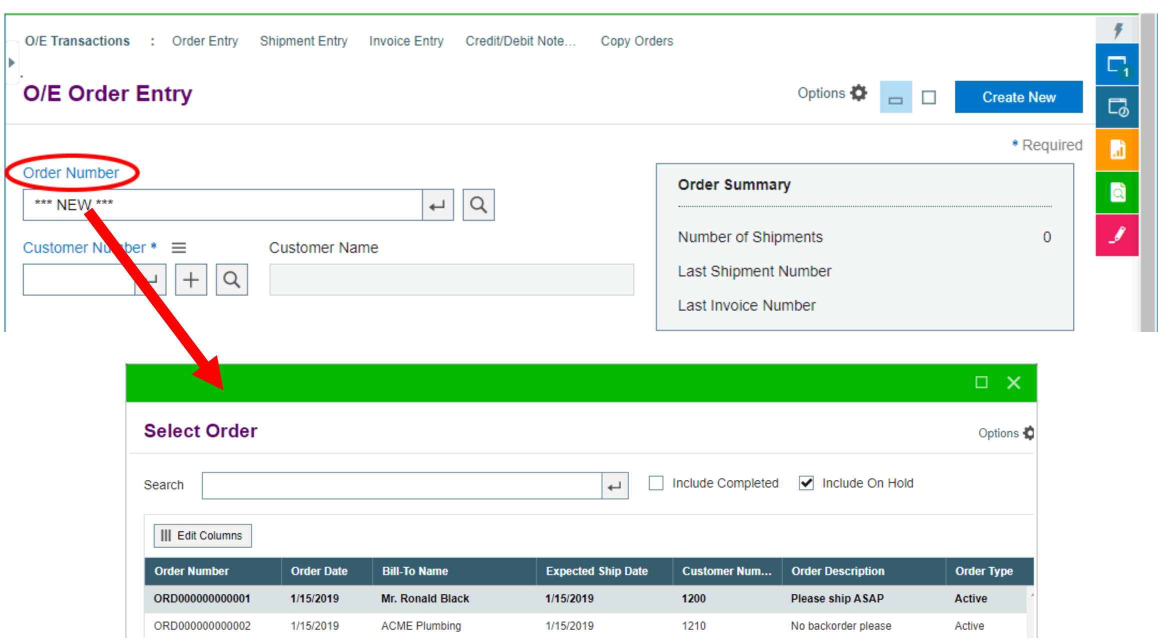
  For example, you can add a "Yes/No" type customer optional field called "Requires PO Number" to A/R customer records, and set the field value to "Yes" for specific customers.

Click the following links for details on customization features for the Order Entry Web Screen:

Order Number SmartFinder
Customer Number SmartFinder
Ship-To Location Code SmartFinder
Editing Columns in SmartFinder Grids
Customer Optional Fields
Require Purchase Order Number on Orders

Order Number SmartFinder

Click the Order Number field name to open the SmartFinder for searching orders.



To search for an order:

- Enter part of a customer name or address (or order description or reference) and press the Tab or Enter key – or click the "↵" button at the end of the Search field.

- Double-click an order to select it and return to the Order form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

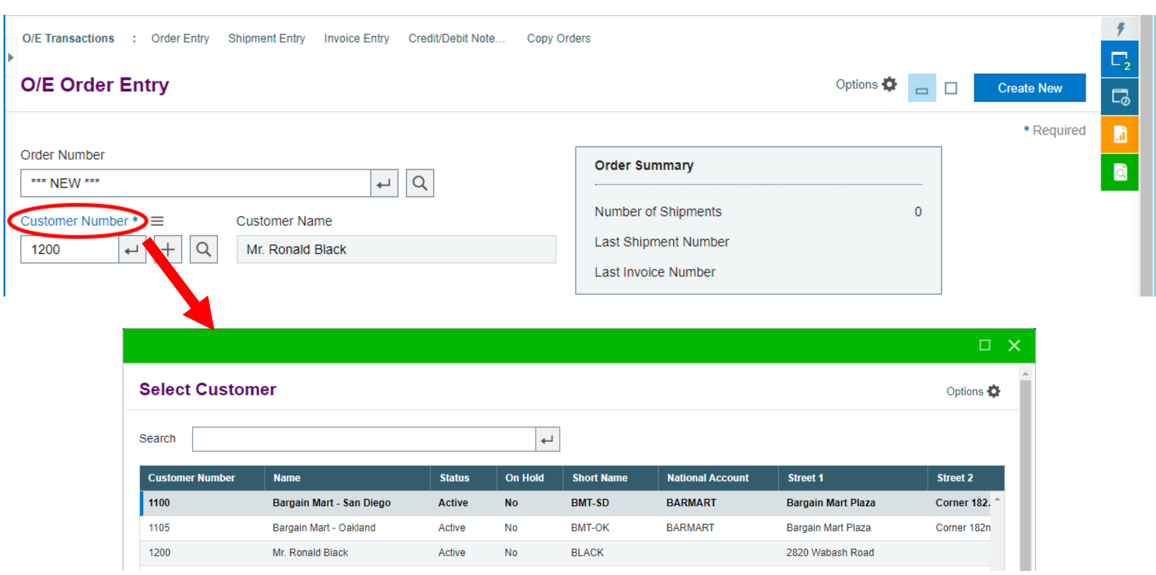
Search notes:

- **The SmartFinder automatically searches through multiple order fields** and displays all orders containing the search terms.

  If one order has "Royal" in the customer name field, and another has it in the address field, both orders will be displayed.
- **Use multiple words in the search field.** Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
  - Enter "ron los" to find "Ronald" in "Los Angeles".
- **Search doesn't care about the word order** or intervening words.
  - Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Use the "Include Completed" and "Include On Hold" checkboxes t**o search for completed and on-hold orders.
- **Use search terms like "Active"** to filter for Active orders.
- **Enter the phone number segments separated by blanks**. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".
- **Dates are stored as YYYYMMDD** (20201231 for Dec 31, 2020). You can enter 2020 to find orders with dates in 2020.

Customer Number SmartFinder

Click the Customer Number field name to open the SmartFinder for searching customers.



To search for a customer:

- Enter part of a customer name or address (or contact phone or email address) and press the Tab or Enter key – or click the "↵" button at the end of the Search field.

  For example, enter "ron los" to find Ronald Black in Los Angeles.

- Double-click the customer to select it and return to the Order form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

Search notes:

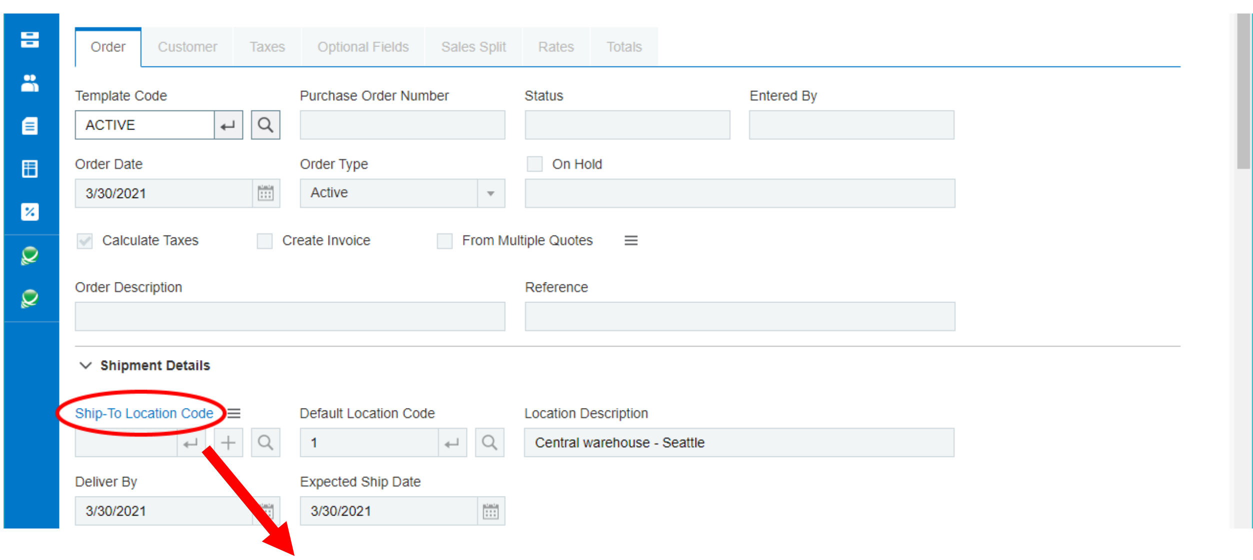
- **The SmartFinder automatically searches through multiple customer fields** and displays all customer records containing the search terms.

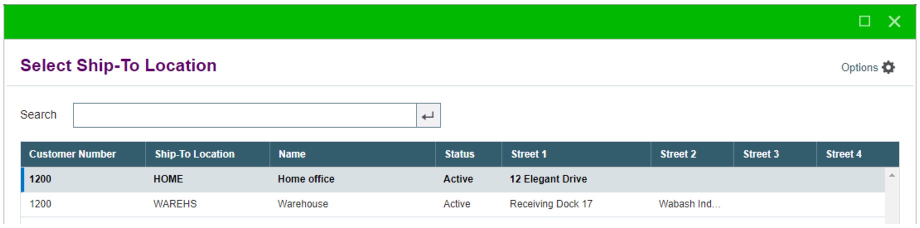
  If one customer record has "Royal" in the customer name field, and another has it in the address field, both records will be displayed.

- **Use multiple words in the search field.** Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
  - Enter "ron los" to find "Ronald" in "Los Angeles".
- **Search doesn't care about the word order** or intervening words.
  - Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Enter the phone number segments separated by blanks**. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".

Ship-To Location Code SmartFinder

Click the Ship-To Location Code field name to open the SmartFinder for searching ship-to locations.



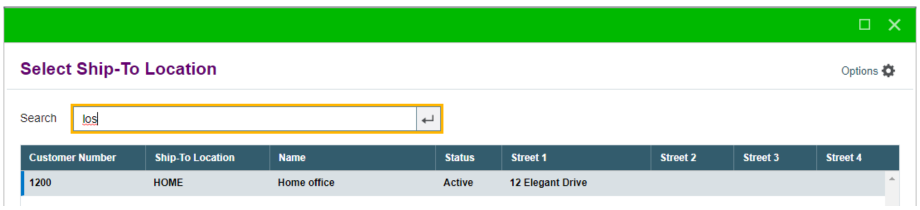


The program displays all Ship-to locations for the current customer.

To search for a ship-to address if the customer account has many addresses:

- Enter part of a name or address (or contact phone or email address) and press the Tab or Enter key – or click the "↵" button at the end of the Search field.

  You can find a specific ship-to address by entering some information about the location, such as the address, city, state, phone number, email, contact name. etc.



- Double-click the ship-to location to select it and return to the Order form.

Note that the SmartFinder displays only the first 100 matching records. If you don't see the record that you are looking for, specify additional or more specific search criteria.

Search notes:

- **The SmartFinder automatically searches through multiple ship-to location fields** and displays all records containing the search terms.

  If one ship-to location record has "West" in the city name field, and another has it in the address 1 field, both records will be displayed.

- **Use multiple words in the search field.** Search returns all records that contain all parts of the search string, even if the separate words in the search string are found in different record fields.
  - Enter "jeff los" to find "Jefferson Boulevard" in "Los Angeles".
- **Search doesn't care about the word order** or intervening words.
  - Enter "300 Main" to find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Enter the phone number segments separated by blanks**. Enter "451 8991" and search will find "(451) 555-8991" as well as "(408) 451-8991".

Editing Columns in SmartFinder Grids

You can change the order of columns in SmartFinders, and add or remove columns from the grids. Note that SmartFinders will continue to search on key fields, even if you remove them.

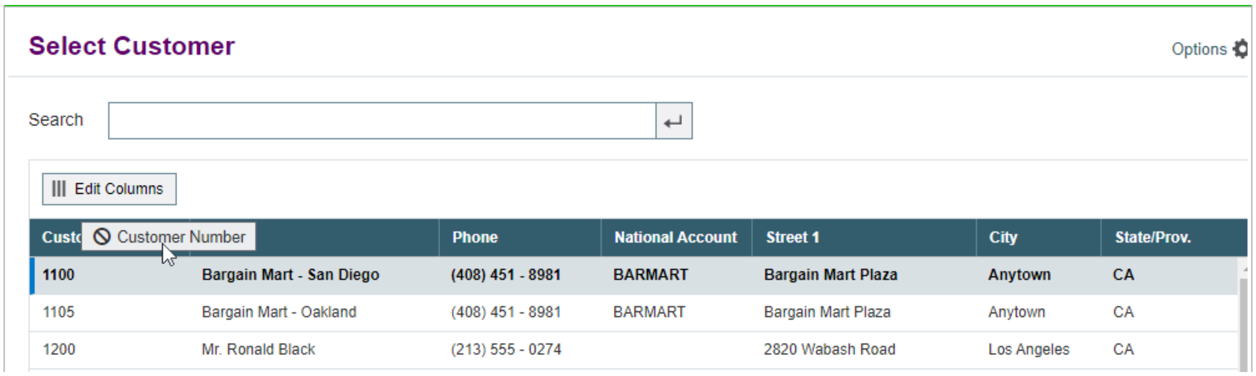
You can edit grid columns by dragging and dropping the columns to new locations or by clicking the Edit Columns button, then selecting and moving columns in the Edit Columns popup dialog.

The program saves all column changes when you close the SmartFinder, and you can restore default settings using the Restore Table Defaults link at the bottom of the Edit Columns popup.

SmartFinder column settings are <u>entity</u> specific. This means that if you change the settings for the customer SmartFinder on the Order Entry screen, the changes will appear for ***all*** customer SmartFinders. (Customers, Vendors, Ship-To Locations, Orders, Shipments, etc. are different entities.)

Dragging and Dropping SmartFinder Columns

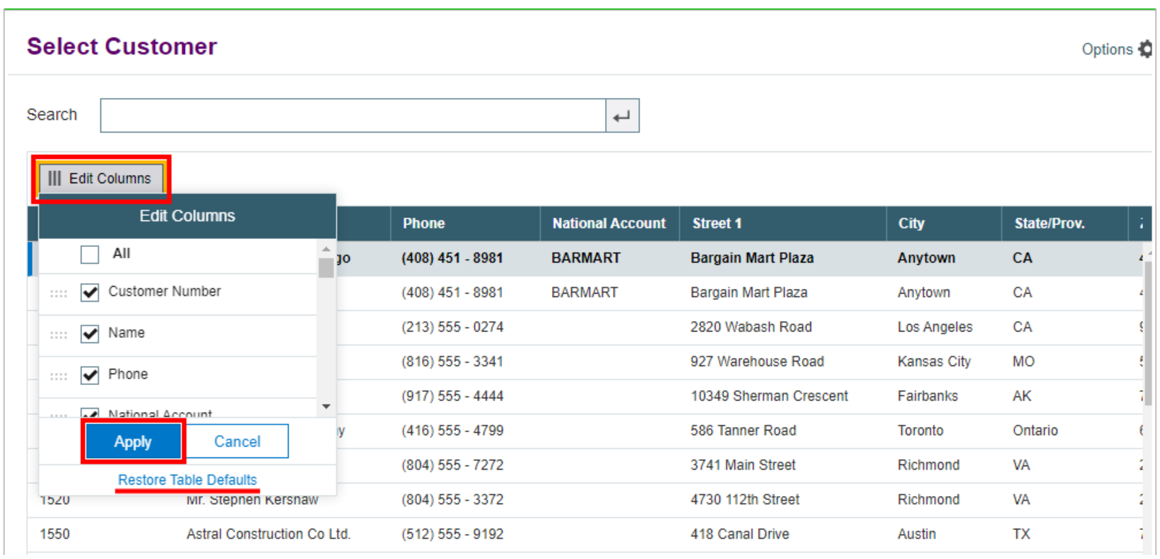
Drag and drop works as you would expect: just left-click on the SmartFinder column heading, hold down the mouse button, and drag the heading to a new location.



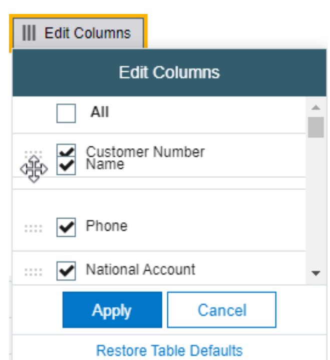
Editing SmartFinder Columns Using the Edit Columns Popup Dialog Box

To edit Columns with the Edit Columns popup:

- Open the SmartFinder and click the Edit Columns button.

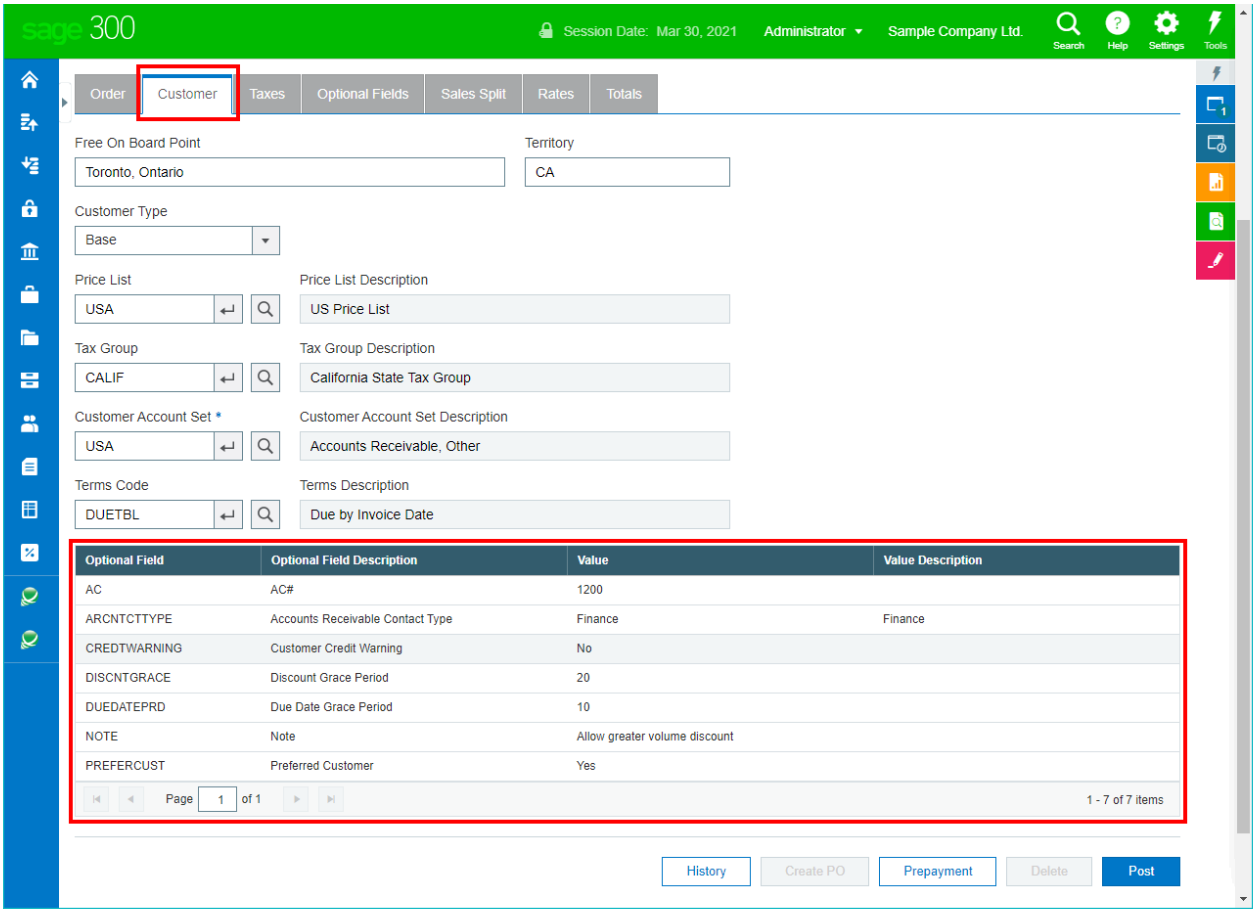


- Use the checkboxes to add or remove columns.
- Drag and drop columns to new positions in the list. The cursor changes to the "drag" cursor shown on the right.
- Click the Apply button when you are satisfied with your changes, or click the Cancel button to close the popup without saving new settings.
- Click Restore table defaults to return the grid to the default column settings.



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 Customer tab of the Order Entry screen.



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

You specify which optional fields to display on the Order Entry and Shipment Entry screens in the Productivity Tools Options program on the Sage 300 Desktop.

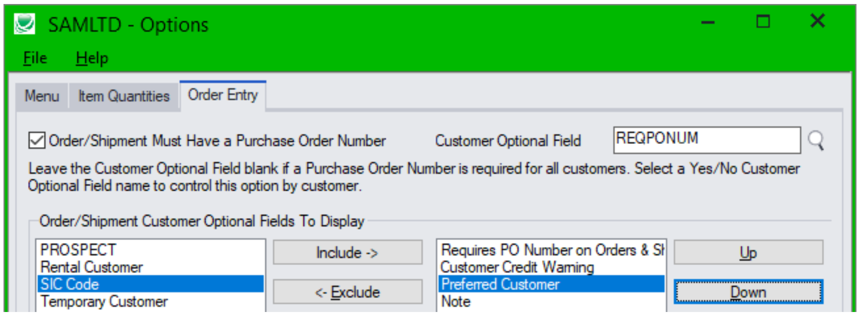
Require Purchase Order Number on Orders

Productivity Tool’s Extended Order Entry includes an option to force users to include purchase order numbers on orders and shipments for all or for selected customers. You select this option in the Productivity Tools Options program on the Sage 300 Desktop.

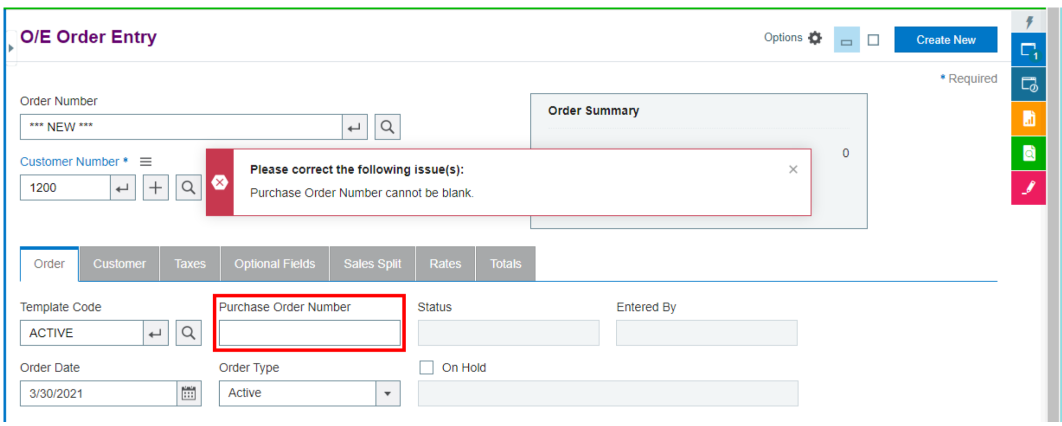
- The program lets you require PO numbers for all customer orders and shipments – or only for customers that have a “Yes” value for a specific optional field (for example “Requires PO Number”).
- If a customer record does not include a value for the Yes/No optional field, the program will ***not*** require a purchase order number when you create an order or shipment.

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.

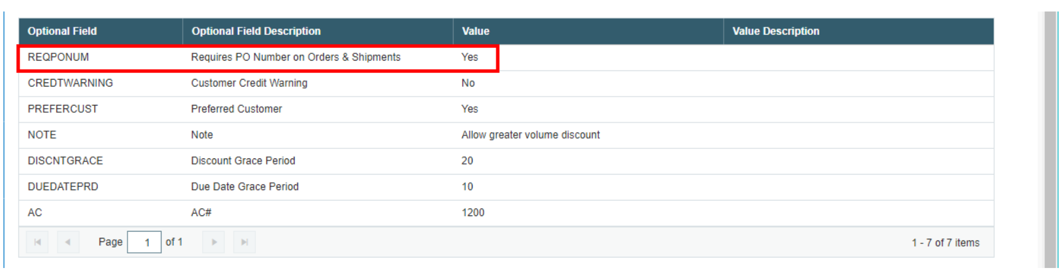
- You choose the option and the optional field in the Productivity Tools Options program on the Sage 300 Desktop:



- If you use the option to force PO numbers on orders and shipments – and the customer record includes the control field with a "Yes" value – the following message appears when you try to post an order that's missing the PO number.



- In this example, the "Requires PO Number . . ." field also appears on the Customer tab in Order Entry.



Optional Field	Optional Field Description	Value	Value Description
REQPONUM	Requires PO Number on Orders & Shipments	Yes	
CREDTWARNING	Customer Credit Warning	No	
PREFERCUST	Preferred Customer	Yes	
NOTE	Note	Allow greater volume discount	
DISCNTGRACE	Discount Grace Period	20	
DUEDATEPRD	Due Date Grace Period	10	
AC	AC#	1200	

Page 1 of 1 — 1 - 7 of 7 items

Note that the field appears on the customer tab 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).