

# TaiRox™ Memo

## Using SmartFinders™

### Finders in Sage 300

Finders let you look up items, customers, and vendors when you don't know their record numbers. A pop-up window provides ways to search for the record number based on what is known, typically a portion of the description. TaiRox SmartFinders appear in enhanced versions of Sage 300 screens.

### Compare Finders and TaiRox SmartFinders

| Sage 300 Finders  | TaiRox SmartFinders   |
|---|---|
| Sage 300 Finders search only one field at a time.   | TaiRox SmartFinders search multiple fields and tables at the same time.   |
| Sage 300 Finders search in a structured way. A single word (or word portion) is used to search a single field in a single table to find a customer, vendor, or item number. You have to say which field is to be used for the search. | TaiRox SmartFinders search like an internet search engine. Enter a word (or word portion) to search through multiple fields and multiple tables. Too many results? Add a second or third word - just like for an internet search. |
| Sage 300 Finders don't consider the context. A customer finder in order entry is the same program that is used in accounts receivable. A vendor finder in purchase orders is the same program that is in accounts payable.            | TaiRox SmartFinders are context sensitive. A customer SmartFinder in order entry searches ship-to tables as well as customer tables. A vendor SmartFinder in purchase orders searches remit-to tables as well as vendor tables.   |
| The Sage 300 Inventory Finder doesn't consider that thousands of inventory items entered over many years may have very inconsistent descriptions. Searching for "2" Brass Screw" won't find "Screw Brass 2".                          | TaiRox SmartFinders treat each word (or word portion) independently. Searching for "2" Brass Screw" will find "Screw Brass 2" or "Brass Screw 2" or "Brass 2" Screw" or any other combination of the 3 search words.              |
| Sage 300 Finders typically display inactive items. There may be a lot of these, cluttering up the search results.   | TaiRox SmartFinders typically have an "Active Items Only" checkbox. One click excludes these items from the search.   |
| All Sage 300 Finders display a single grid, so what you are looking for better be in the primary table.   | TaiRox SmartFinders display multiple grids and sometimes multiple tabs. See the pictures at the end of this document.   |

### How Fast Are SmartFinders?

SmartFinders create database queries that are passed directly to SQL Server. In other words, the queries are as fast as possible. Results are typically returned in a fraction of a second.

## Searching - Example #1

You provide credit to a core set of customers, but you have many more one-off customers that pay cash. For warranty - or other reasons - you track the one-off customers as ship-to addresses for the same generic customer. When a one-off customer wants to place an order, you can't find them by searching through the customer table. The TaiRox SmartFinder will search the ship-to details as well as the customer details. The SmartFinder will find the customer, even if you only know a phone number or part of an address. It will display customers on a top grid and ship-to addresses on a bottom grid. Selecting a ship-to address on the bottom grid will populate both the customer number and the ship-to address on the order entry screen.

## Searching - Example #2

A customer is phoning in an order. They don't know your item number, but they do know the manufacturer's item number. The TaiRox order-entry item SmartFinder has a manufacturer's item tab so you can search through that table. The SmartFinder, as always, will search multiple fields, treating each word (or word portion) independently,

## SmartFinder Pictures That Follow

- **Order Entry SmartFinders** for orders, customers and items (2 tabs)

### Order Entry Order Finder

The order table is searched. The top grid displays the matching orders and the bottom grid displays the items on the selected order in the top grid. Order types can be selected from a drop-down list. Completed or On-Hold orders can be included or excluded with one click.

The screenshot shows the PTDEMO - Extended Order Entry window. The search term 'black' is entered in the search field. The Order Type is set to 'All'. There are checkboxes for 'Include Completed Orders' and 'Include Orders on Hold'. The top grid displays a list of orders with columns: Order Number, Order Type, Customer Number, Bill-To Name, Bill-To Address Line 1, Bill-To Address Line 2, and Bill-To Address Line 3. The bottom grid displays a list of items with columns: Item, Description, Kit/BOM Number, Price List, Location, Expected Shipment Date, Quantity Ordered, and Order Unit of Measure. The 'Select' and 'Cancel' buttons are visible at the bottom.

| Order Number | Order Type | Customer Number | Bill-To Name     | Bill-To Address Line 1 | Bill-To Address Line 2 | Bill-To Address Line 3 |
|--------------|------------|-----------------|------------------|------------------------|------------------------|------------------------|
| ORD000000... | Active     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Active     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Active     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Active     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Active     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Standing   | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| ORD000000... | Future     | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |
| QT000000...  | Quote      | 1200            | Mr. Ronald Black | 2820 Wabash Road       |                        |                        |

  

| Item     | Description        | Kit/BOM Number | Price List | Location | Expected Shipment Date | Quantity Ordered | Order Unit of Measure |
|----------|--------------------|----------------|------------|----------|------------------------|------------------|-----------------------|
| A1-103/0 | Fluorescent Des... |                | USA        | 4        | 1/15/2019              | 10               | Ea.                   |
| A1-105/0 | 13W Mini Fluore... |                | USA        | 1        | 1/15/2019              | 15               | Ea.                   |
| A1-400/0 | Desk Note Book     |                | USA        | 4        | 1/15/2019              | 3                | Ea.                   |
| A1-450/0 | Bulletin Board     |                | USA        | 4        | 1/15/2019              | 2                | Ea.                   |

## Order Entry Customer Finder

The customer and ship-to tables are searched. The top grid displays the matching customers and the bottom grid shows the matching ship-to addresses. Inactive customers can be included or excluded with one click. Selecting from the bottom grid populates both the customer and ship-to codes on the order entry form.

PTDEMO - Extended Order Entry

File Help

Search  Find

Active Customers Only

| Customer Number | Status | Customer Name       | Short Name | Address Line 1      | Address Line 2     | Address Line 3 | Address Line 4 | City |
|-----------------|--------|---------------------|------------|---------------------|--------------------|----------------|----------------|------|
| 1100            | Active | Bargain Mart - S... | BMT-SD     | Bargain Mart Plaza  | Comer 182nd and... |                |                | Any  |
| 1105            | Active | Bargain Mart - O... | BMT-OK     | Bargain Mart Plaza  | Comer 182nd and... |                |                | Any  |
| 1200            | Active | Mr. Ronald Black    | BLACK      | 2820 Wabash Road    |                    |                |                | Los  |
| 1240            | Active | The Courtyard       | COURT      | 10349 Sherman C...  |                    |                |                | Fair |
| 1580            | Active | Break-Away Des...   | BREAK      | 743 Wark Street     |                    |                |                | Sac  |
| 1970            | Active | Mr. Ronald Engli... | ENGLI      | 2375 Hudson Ave...  |                    |                |                | Fair |
| 7100            | Active | Bashaw Bulldozi...  | BASHAW     | 2398 Colorado Cres. |                    |                |                | Bur  |
| BARMART         | Active | Bargain Mart Sto... | BARMART    | Bargain Mart Plaza  | Comer 182nd and... |                |                | Any  |

Active Ship-To Locations Only

| Customer Number | Ship-To Location | Status | Description          | Address Line 1       | Address Line 2        | Address Line 3 | Address Line 4 |
|-----------------|------------------|--------|----------------------|----------------------|-----------------------|----------------|----------------|
| 1200            | WAREHS           | Active | Warehouse            | Receiving Dock 17    | Wabash Industrial ... |                |                |
| 1400            | FIRST            | Active | First National Ba... | #10 Central Boule... |                       |                |                |

Select Cancel

## Order Entry Item Finder - Items Tab

Both the Item table and the Customer Item table are searched and displayed. Active items can be included or excluded with one click.

PTDEMO - Extended Order Entry

File Help

Items Manufacturer's Item Number

Find Items By

Search

Location  Central warehouse - Seattle

Price List

Active Items Only

| Item Number | Description               | Price | Qty. Available | Qty. Available (All) | Status | Comment 1         |
|-------------|---------------------------|-------|----------------|----------------------|--------|-------------------|
| A1-105/0    | 13W Mini Fluorescent Bulb |       | 70             | 378                  | Active | Replacement bulb. |
| A1-320/0    | 50W/12V Halogen Bulb      |       | 80             | 135                  | Active | Replacement bulb. |

Customer Item Numbers

| Customer's Item Number | Customer's Item Description | Customer Name    | Unit of Measure | Comments | Instructions |
|------------------------|-----------------------------|------------------|-----------------|----------|--------------|
| LIGHT BULB 13W         | Light bulb mini             | Mr. Ronald Black | Ea.             |          |              |

Find Select Cancel

## Order Entry Item Finder - Manufacturer's Tab

The Manufacturer's Item table is searched and displayed.

The screenshot shows a software window titled "PTDEMO - Extended Order Entry". The "Manufacturer's Item Number" tab is selected. The search criteria are set to "Find Items By" with a search box containing "001". The "Active Items Only" checkbox is unchecked. The results table is as follows:

| Manufacturer's Item Number | Manufacturer's Item Description | Item Number | Description             | Price | Qty. Available | Qty |
|----------------------------|---------------------------------|-------------|-------------------------|-------|----------------|-----|
| A1001                      | Accessories - Lamp              | A1-103/0    | Fluorescent Desk Lamp   |       | 137            |     |
| MN000103                   | Bar Code - screens              | S1-200/B    | Flat Screen 5'6 H x 5'W |       | 71             |     |
| MN000105                   | Bar Code - screens              | S1-300/R    | Curved Screen 5'H x 6'W |       | 0              |     |
| S1001                      | Flat Screen                     | S1-200/B    | Flat Screen 5'6 H x 5'W |       | 71             |     |
| S1001                      | Flat Screen                     | S1-200/R    | Flat Screen 5'6 H x 5'W |       | 0              |     |
| S1001                      | Flat Screen                     | S1-200/W    | Flat Screen 5'6 H x 5'W |       | 0              |     |
| S1001                      | Flat Screen                     | S1-200/Y    | Flat Screen 5'6 H x 5'W |       | 0              |     |

Buttons at the bottom include "Find", "Select", and "Cancel".

## Similar Or Analogous SmartFinders to Those Shown Above

- **Shipment Entry** SmartFinders for shipments, orders, customers and items.
- **Purchase Order Entry** SmartFinders for purchase orders, vendors and items.
- **Receipt Entry** SmartFinders for receipts, purchase orders, vendors and items.