

Extended Order Entry

Extended Order Entry is an enhanced replacement for the Sage Order Entry screen. It provides you with more functionality while entering an order, and fast access to order, customer, and item information.

The following screens show some of the extra features provided by the Extended Order Entry screen:

Sage Order Entry screen

TaiRox Extended Order Entry screen

Click the following links for details on each Extended Order Entry feature:

[SmartFinder – Orders](#) Find orders quickly for a customer.

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

[Item Finder \(SmartFinder – Items\)](#) Find an item quickly from partial words. Show additional item columns such as price, quantity and comments. Search also by manufacturer's item number with the Enterprise version of Productivity Tools.

SmartFinders provide fast, browser-like search capabilities for looking up data on the Order Entry screen. They search more fields than the Finder and search in all text fields at once. For example, search for "Seattle" if you think that the customer or contact is in Seattle.

[Line Finder](#) Quickly find a detail line in a large order by item number, item description, item comments, picking sequence, location, manufacturer, or other item fields.

[Customer Inquiry](#) (button left of the Customer Name field) provides complete customer data, including receipts, refunds, order, invoices, IC contract pricing, ship-to addresses, etc. using the TaiRox Extended Customer Inquiry window instead of the Sage Customer Inquiry screen.

[Calculate Expected Ship Date and Deliver By Date](#) Use the Business Days and Non-Business Days optional field in the Productivity Tools Options program to calculate shipment and delivery dates.

[Customer Optional Fields](#) Display any customer optional fields on the Extended Order Entry screen.

[Require PO Number](#) Optionally require PO numbers on orders for all or selected customers.

[Display and Edit Optional Fields in the Order Entry Detail Grid](#) Optional fields appear as grid columns.

[Other Restrictions and Preferences set in TaiRox Productivity Tools Options](#) Select more data entry control options in the TaiRox Productivity Tools Options program:

- Warn if a PO is duplicated on an order or shipment.
- Show unit of measure totals on the Extended Order Entry screen.
- Include the discount percent set on order lines and for the order as a whole.
- Prevent orders and one-time shipments from being posted if the Ship-To Location is blank.
- Prevent users from entering or changing ship-to addresses.
- Require a ship-to phone number on orders and shipments.
- Default the quantity committed on orders to the quantity ordered for select customers.

[Margin and Recent Cost Columns](#) Add 4 margin and markup columns to the item display grid. Click on a button to display margin and markup for the whole order.

[Edit Kit Details Using the Components Button](#) Configure kits in an order without cluttering up master kit definitions. Add items, delete items and modify quantities. Choose whether or not to re-calculate the unit price.

[Using the Enhanced BOM Components Popup](#) View component quantities on hand and quantities available at the current location, as well as component quantities on sales order and quantities committed at the current location and at all locations.

[Quick Forms Printing \(O/E Forms\)](#) Print a number of order-related forms, without posting an order or navigating to another window.

[Print Picking Slips Fast](#) Streamline the printing of picking slips, in situations where large numbers of these are to be printed as quickly as possible.

[Quick PJC Entry](#) Contract, Project and Category codes will default to the previous line's entries when inserting new lines.

[Prepayments](#) lets you view order prepayments entered in Order Entry or in Accounts Receivable.

[Create Purchase Orders](#) in a flexible and robust way, previewed and with many options.

[Ship by Picking Sequence and Filter Items](#) Enter quantities picked for a large number of items by sorting items in picking sequence and restricting the item range – for example, by ship-via code.

[Order from History](#) Add items to new orders for a customer based on previous orders.

[Item Quantities](#) Display quantities available at other locations or in other companies while entering an order.

[BOM or Kit - Use as Default](#) Use the default number when a BOM or Kit is added to an order.

[Backorders](#) Display all items currently on backorder for the current customer.

[Update Order](#) Change Kit and BOM numbers, expected ship dates, item prices, addresses, and deliver-by dates. Commit and uncommit quantities, substitute one item for another, change salesperson code, zero quantities that are not in stock, and change item location.

Note: You may need to maximize the Extended Order Entry screen to see all of the Sage 300 and TaiRox Productivity Tools buttons at the bottom of the screen.



SmartFinder – Orders

Click the Order Number button to open the SmartFinder for searching orders.

Order No.

- Enter part of a name or address (or order description or reference) and click the Find button.
- Double-click the order to select it and return you to the Order form.

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by order type and include completed and on-hold orders.
- Search returns 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 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 an order where “Ross” is in the Customer Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the Bill-To addresses) are treated as a single field.

Display:

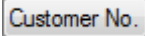
- The top grid displays the orders matching the search criteria. Double-click to select an order.
- The bottom grid displays the details of the order highlighted in the top grid.
- Click the Bill-To Address column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the locations of Ship-To addresses.
- Double-click email addresses (such as the Bill-To Contact E-mail) to create new emails.

The screenshot shows the SmartFinder interface with a search for "black". The top grid lists several orders. The second order is selected, and its details are shown in the bottom grid. A red arrow points from the "Bill-To Address Line 1" column of the top grid to a Google Maps view of the address 2820 Wabash Ave, Los Angeles, CA 90033, USA.

Order Number	Order Type	Customer Number	Bill-To Name	Bill-To Address Line 1	Bill-To City	Bill-To State/Province	Bill-To Zip
ORD000000000001	Active	1200	Mr. Ronald Black	2820 Wabash Road	Los Angeles	CA	9004
ORD000000000005	Active	1200	Mr. Ronald Black	2820 Wabash Road	Los Angeles	CA	9004
ORD000000000006	Active	1200	Mr. Ronald Black	2820 Wabash Road	Los Angeles	CA	9004
ORD000000000007	Active	1200	Mr. Ronald Black	2820 Wabash Road	Los Angeles	CA	9004

Item	Description	Kit/BOM Number	Price List	Location	Expected Ship	Quantity Ordered	Order Unit of Measure
A1-103-0	Fluorescent Desk	USA	4	2019-01-15	15	Ea.	
A1-105-0	13W Mini Fluores.	USA	1	2019-01-15	15	Ea.	
A1-400-0	Desk Note Book	USA	4	2019-01-15	3	Ea.	
A1-450-0	Bulletin Board	USA	4	2019-01-15	2	Ea.	

SmartFinder – Customers

Click the Customer Number button to open the SmartFinder for searching customers. 

- Enter part of a name or address (or contact phone or email address) and click the Find button.
- Double-click the customer to select it and return you to the Order form.

Search:

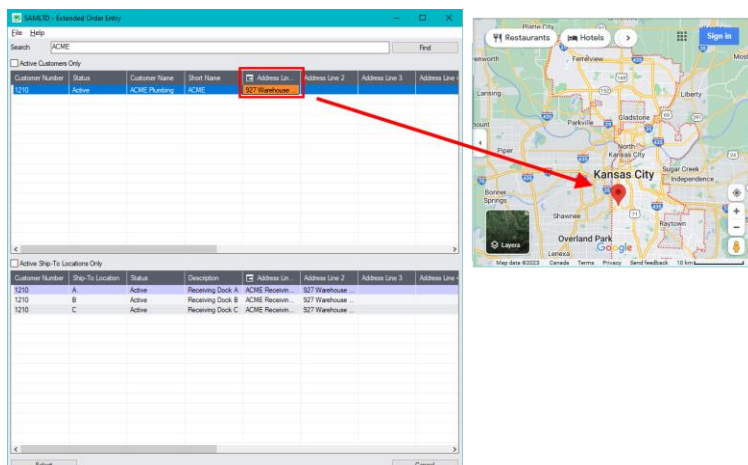
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter to retrieve active customers only and active ship-to locations only.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields – 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 customer where “Ross” is in the Customer Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the Bill-To addresses) are treated as a single field.

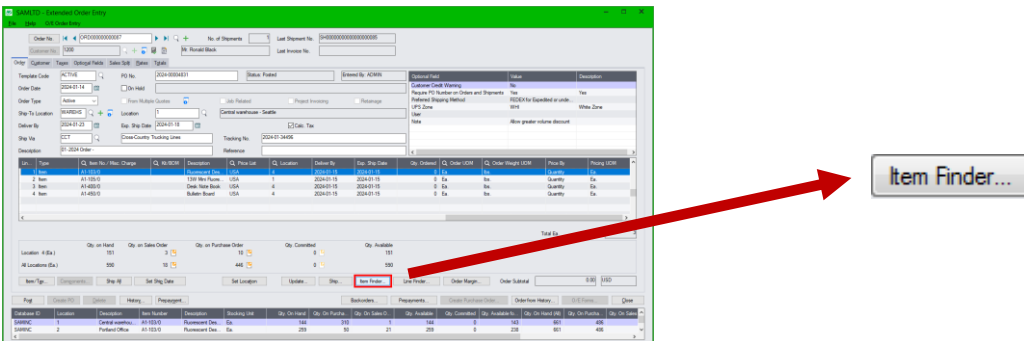
Display:

- The top grid displays the customers matching the search criteria. Double-click to select a customer.
- The bottom grid displays the ship-to locations that match the search criteria.
Note that the ship-to locations **may not** be related to the customer records displayed in the top part of the screen. Ship-to locations appear *only* if they contain the search string.
- Click the Address column heading or double-click the address to launch **Google Maps** with the bill-to address. You can also check the locations of ship-to addresses.
- Double-click email addresses (such as the Bill-To Contact E-mail) to create new emails.

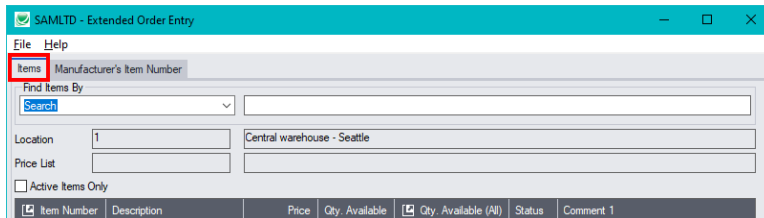


Item Finder (SmartFinder – Items)

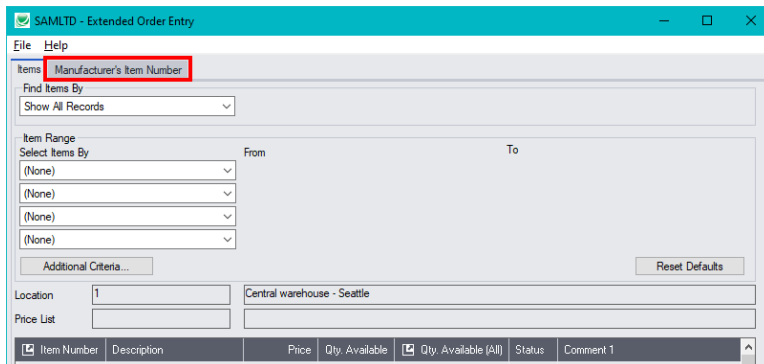
Click the Item Finder button under the item grid to open the SmartFinder for items.



The Item Finder provides several item search options and displays search results in a selection grid with columns such as price, description, quantity available (current and all locations) and comments. Often, Order Entry users select between similar items based on these columns.



- The Item Finder appears with the “Search” choice selected by default on the Items tab. This is the most common way to look up items.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for items.
- Alternatively, select a different “Find Items By” choice. For example, you can choose “Show All Records” and specify a range of item numbers, structure codes, categories, or account sets using the range fields. You can specify more selection fields using Additional Criteria.



Notes:

- The above search screen displays two tabs for looking up inventory items – Items and Manufacturer's Item Number – which let you search for I/C item numbers or for manufacturer's item numbers.

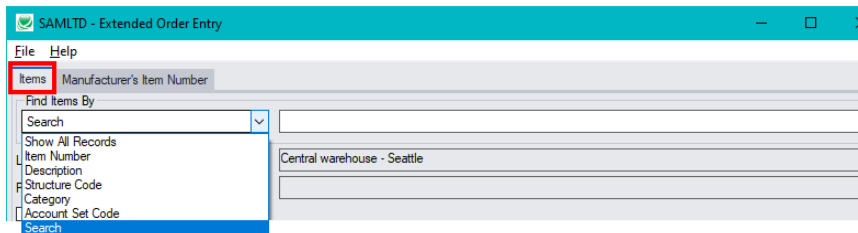
Search for manufacturer's item numbers is a Productivity Tools Enterprise feature.

The Manufacturer's Item Number tab will **not** appear unless you have a license for the Enterprise version of Productivity Tools.

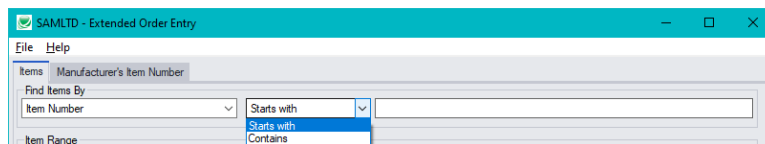
- If you do not select the SmartFinder “Search” option, you can select up to four item field ranges – by item number, status, structure code, category code, and account set code.
- The item price is the quantity zero price for that customer.
- The Item Finder also displays all columns that are in the standard Sage Finder. You can choose which columns appear in the Item Finder by selecting File > Settings from the Item Finder menu.
- Selecting an item inserts a new row into the order entry grid.

Searching for Inventory Control Item Numbers on the Items Tab

The Item Finder on the Items tab provides 7 search options:



- **Search** (most common option) – to search for words or word fragments in item text fields (such as the item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the Order Number and Customer Number SmartFinders.
The “Search” choice automatically searches in all fields that appear as columns in the grid.
- **Show All Records** – to select items from all item records based on ranges of Item Number, Structure Code, Category, and Account Set Code and on item Status. You can also specify additional selection criteria using more item fields.
- **Item Number** – to select items using part of the item number. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.



Search by Item Number, Description, Structure Code, Category and Account Set Code also let you specify a search value that the item starts with or contains.

- **Description** – to select items with descriptions that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Structure Code** – to select items with structure codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Category** – to select items in categories that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

- **Account Set Code** – to select items with codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

More on the “Search” option (most common option):

- Select “Find Items by Search”. (Note that Find Items By defaults to the last choice used.)
- Enter one or more words or word fragments in the next field to search multiple item tables and fields. (Note that the program scans all columns displayed in the Item Finder grid.)
- You can filter for Active items only.
- Search returns items and customer item numbers that contain the search string in any of the searched fields – for example, one record may have “Desk” in the Description field, where another may have it in the Comment 1 field. Both items will be displayed.

Note:

- *If using the Search option, all of the word fragments must be present in one of the fields that are displayed on the screen. (For example, if you search for “desk lamp”, you will not see an item where only “desk” is in the Description field and only “lamp” is in the Comment 1 field.)*

Display:

- The top grid displays the items matching the search criteria. The screen below shows “Desk Lamp” in the description of one item, and “Desk Lamp” in the comments of the second one – so both appeared.
- The bottom grid displays the customer item numbers for the item selected in the top grid.

The screenshot shows the 'SAMLTD - Extended Order Entry' window. The 'Find Items By' dropdown is set to 'Search', and the search text 'desk lamp' is entered. The 'Location' is set to 'Central warehouse - Seattle'. The 'Active Items Only' checkbox is checked. The top grid displays two items:

Item Num	Description	Price	Qty. Avail	Qty. Avail	Status	Comment 1
A1-103-0	Fluorescent Desk Lamp	\$9.99	181	516	Active	Comes with stand and mount
A1-310-0	Halogen Desk Light	\$0.35	75	352	Active	Desk lamp with adjustable nt

The bottom grid displays customer item numbers for the selected item (A1-103-0):

Customer's Item Number	Customer's Item Description	Customer Name	Unit of Measure	Comments	Instructions
DESK LAMP CASE		Mr. Ronald Black	Case		

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

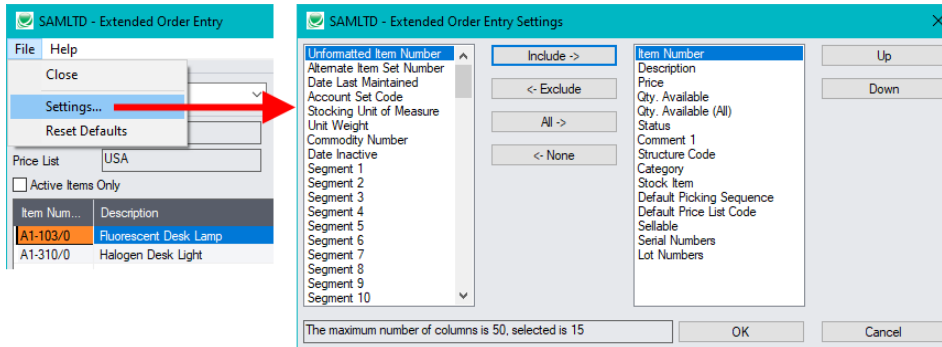
- Click the Qty. Available column to see the location details, with the quantities on hand, on purchase order and on sales order. You can drill down further on these quantities.

Selection:

- Double-click an item in the top grid to select and add the item to the order.
- Double-click a customer item number in the bottom grid to enter the item number and the customer item number into the order form.

Selecting columns to display – and scan – in the Item Finder

Choose **File > Settings** in the Item Finder window to change column settings.

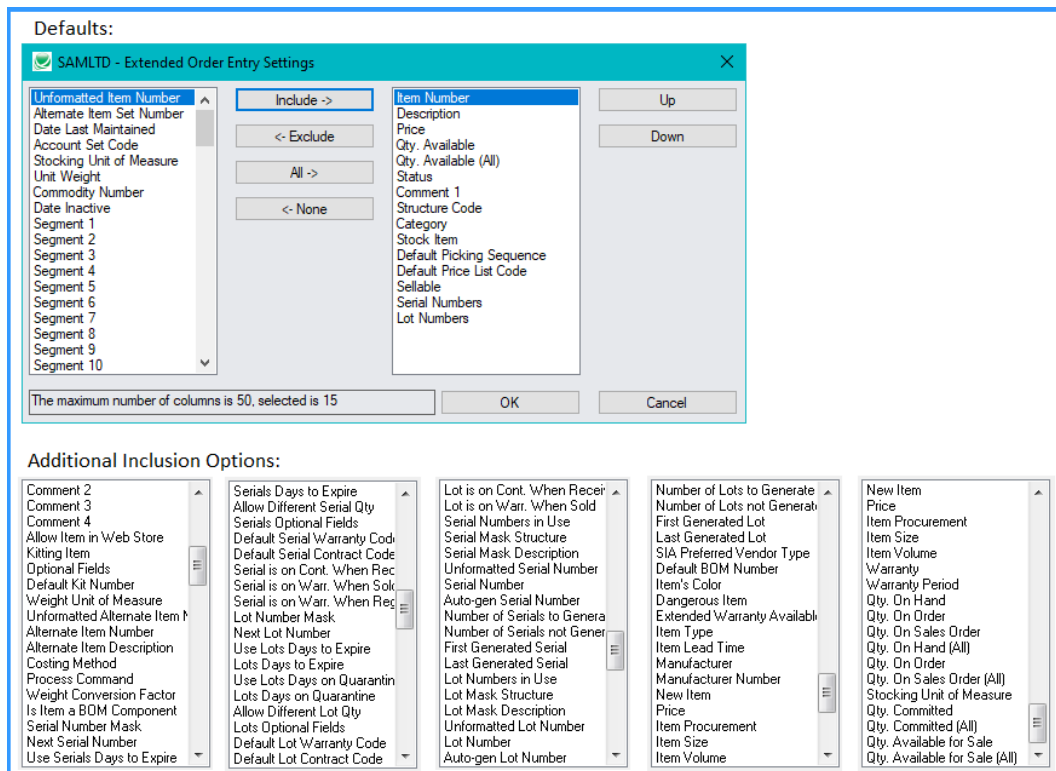


- The current columns that are displayed appear in the right-hand column.
- Highlight columns that you want to add in the left-hand column and click the Include button.

Note:

- **Settings apply to the currently selected tab.** For example, if you want to change the columns on the Manufacturer's Item Number tab, choose the tab first, and then select File > Settings.
- Only the "Included Fields" are used for searching. For example, if you do not include the Comments 1 field, the program will not scan the comments. Also note that fields like the "Price" will affect performance because the program calculates the price for the current customer in order to display it in the item results. If search is slow, remove columns that you don't need.

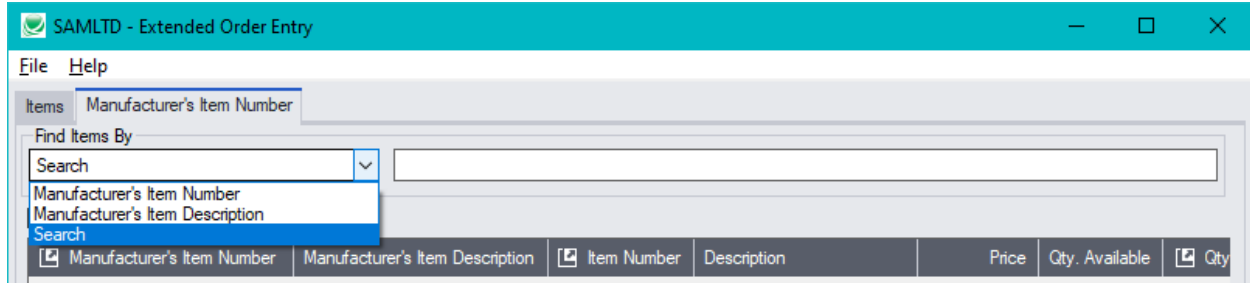
All of the possible columns are shown below. Note that optional and calculated fields are also available for inclusion – for example, the Item's Color and Qty. Available for Sale.



Searching for Items on the Manufacturer's Item Numbers Tab

Note: The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

Search for manufacturer's item numbers is a Productivity Tools Enterprise feature.



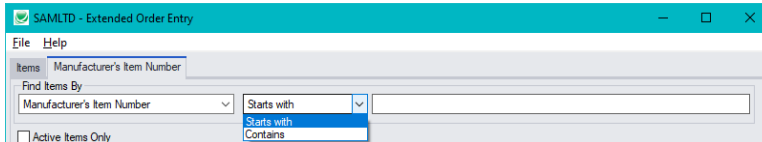
- The Manufacturer's Item Number Finder appears with "Search" selected by default. This is the most common way to look up items by manufacturer's item numbers.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for manufacturer's item numbers.
- Alternatively, select "Manufacturer's Item Number" or "Manufacturer's Item Description" for searching.

The Item Finder on the Manufacturer's Item Number tab provides 3 search options:

- **Search** (most common option) – to search for words or word fragments in manufacturer's item text fields (the manufacturer's item number or the manufacturer's item description).

This search works like the Order Number and Customer Number SmartFinders.

- **Manufacturer's Item Number** – to select items using part of the manufacturer's item number.



You can specify that the item number starts with or contains the string that you enter.

- **Manufacturer's Item Description** – to select items using part of the manufacturer's item description. As with the item number, you can specify that the item description starts with or contains the string that you enter.
- Note that the "Search" choice automatically looks in all fields that appear as columns in the grid – such as the manufacturer's item number and the manufacturer's item description fields.

Using the Line Finder

The Extended Order Entry Line Finder window lets you quickly find any order detail line in a large order by item number, item description, item comments, picking sequence, location, manufacturer, or other item fields.

Click the Line Finder button to display the Line Finder pop up window.

Line Finder...

- Choose the order in which to display order items in the Line Finder.
You can list items by item number, location, or customer item number. The example below displays lines by item number.
- Choose the selection criteria for displaying order items in the Line Finder.
For example, you can select items by item number, item description, item comments, picking sequence, or location. The example below selects item lines for a range of item numbers and the location.
- Click the Load button to display the selected lines.
- Double-click the line you want to view, or highlight the line and click the Select button at the bottom of the screen.

SAMLTD - Order Details

File Help

Order By

Select Order By

(None) (None) (None)

Select Items By

Item From A1-400/0 To A1-450/0

Location 4 4

(None)

Item Contains Load

Line Number	Completed	Item Number	Description	Price List	Klt/BOM	Location	Exp. Ship Date	Qty. Or...	C
3	No	A1-400/0	Desk Note Book	USA		4	2019-01-15	3.0000	E
4	No	A1-450/0	Bulletin Board	USA		4	2019-01-15	2.0000	E

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	26	3	200	0	26
All Locations (Ea.)	549	3	850	0	549

Select Close

Customer Inquiry

The Customer Inquiry button displays the TaiRox Productivity Tools Customer Inquiry screen – a convenient way to view all data related to the customer. Each tab focuses on an aspect of the customer's data.

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

The screenshot shows the 'PTDEMO - Extended Customer Inquiry' window. At the top, there is a search bar with 'Customer No.' and '1200' entered. A red arrow points from the search bar to the 'Customer Inquiry' button in the top toolbar. The main window displays a detailed customer record for 'Mr. Ronald Black'.

Customer Information	
Short Name	BLACK
Group Code	RTL
Account Set	USA
Rate Type	SP
Territory	CA
Price List	USA
FOB Point	
Inventory Location	1
Ship Via	
Payment Code	CHECK
Check Language	ENG
Delivery Method	Mail
Billing Cycle	BILLWK
Interest Profile	INTRTL
Terms Code	DUETBL
Retainage Terms	
Retainage %	0.00000
Retention Period	0 Days

Account and Billing Information	
Retail Sales Group	Accounts Receivable, Other
Account Type	Balance Forward
Customer Type	Base
Start Date	01/01/2009
Last Maintained	03/01/2013
Inactive	<input type="checkbox"/>
On Hold	<input type="checkbox"/>
Allow Web Store Shopping	<input type="checkbox"/>
Allow Partial Shipments	<input checked="" type="checkbox"/>
Allow Backorder Quantities	<input checked="" type="checkbox"/>
Print Statements	<input checked="" type="checkbox"/>

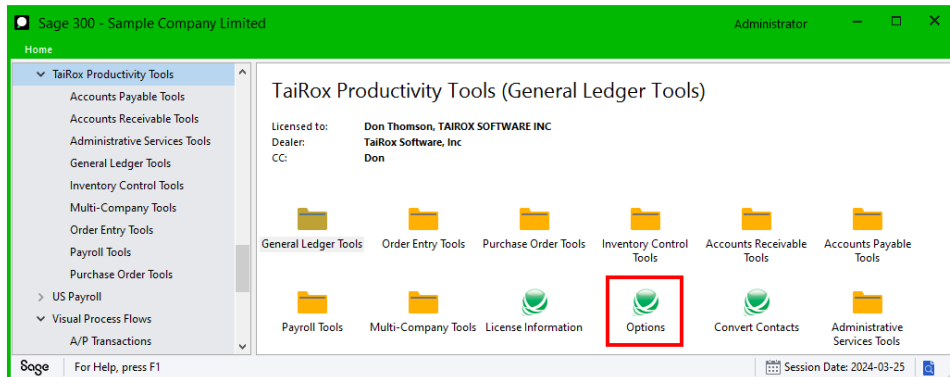
Shipping and Billing Details	
Central warehouse - Seattle	
Check for Duplicate POs	None
Weekly Billing Cycle	
Interest Profile - Retail	
Due by Invoice Date	

Buttons: Refresh, Close

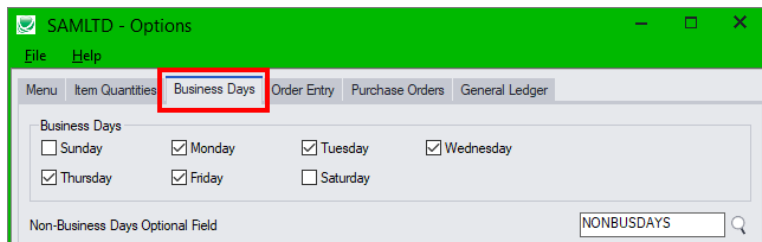
Calculating Expected Ship Date and Deliver By Date for Orders

The Extended Order Entry program will automatically calculate the expected ship date and deliver by date on the order header and order details of each order, based on your company's regular business days and any additional non-business days in your calendar – such as statutory holidays and closures for inventory counts.

You set your company's business days, and a table of additional non-business days, in the Productivity Tools Options program.



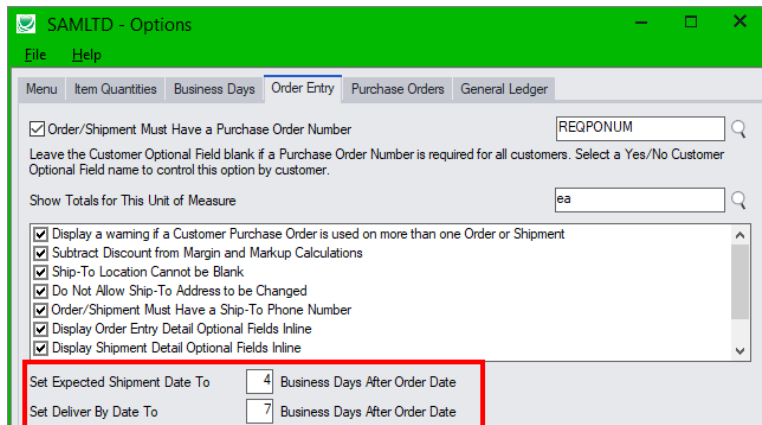
- Set your company's regular business days and additional non-business days on the Business Days tab in the Options program.



The non-business days optional field is a table of upcoming dates when your business will be closed.

Note: if you update the dates in the non-business days optional field, you must restart the Extended Order Entry program for the new dates to be in effect.

- Set the number of days from the order date to the expected ship date and deliver by date on the Order Entry tab in the Options program.



Customer Optional Fields Displayed on the Order Entry Screen

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/R customer record on the right side of the Extended Order Entry screen.

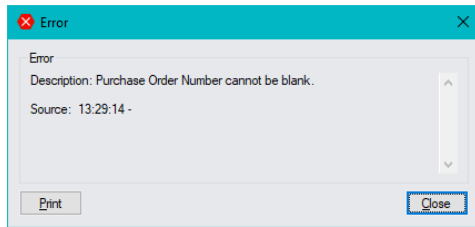
This lets you view notes concerning the account during data entry, and also view order requirements – in this example, one of the fields is “Require Purchase Order No.”

- You specify which optional fields to display on the Extended Order Entry screen in the Productivity Tools Options program – on the Order Entry tab.

Require Purchase Order Number on Orders

Extended Order Entry includes an option to require users to include purchase order numbers on orders for all or for selected customers. You select this option in the Productivity Tools Options program.

If you use the option to force PO numbers on orders, but post an order that's missing the PO number, the following message appears.



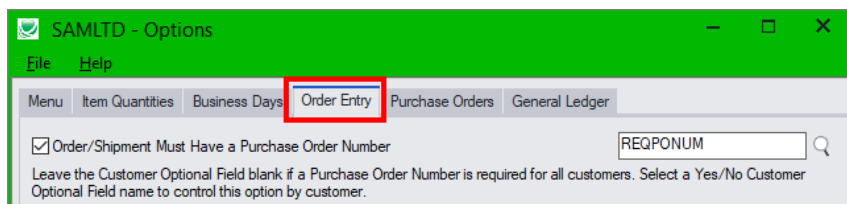
Notes:

- The program lets you require PO numbers for all customer orders, or only for customers with a “Yes” value for a specific optional field. For example, the Order Entry screen pictured above shows an optional field called “Requires Purchase Order No” where the value for the field determines if the PO number is required.
- 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.

Setting Up the Option to Require PO Numbers on Orders

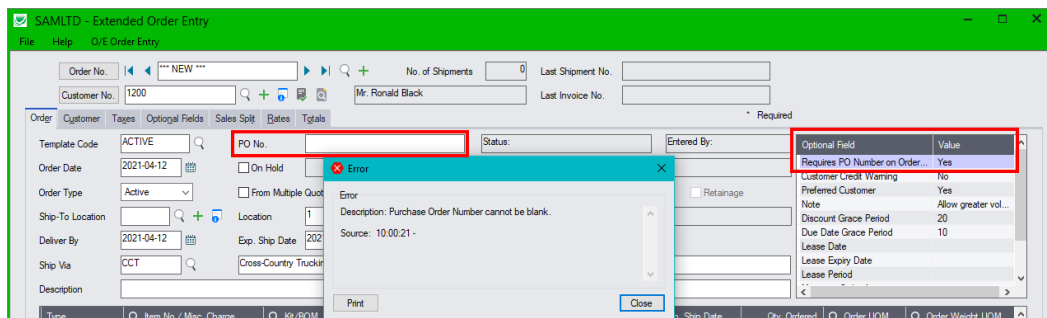
In the following example, the program uses the Yes/No value in Optional Field “REQPONUM” (with a description “Requires PO Number on Orders and Shipments”) to determine whether customers require a PO number.

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



(The General Ledger tab appears only if you have a license for TaiRox Productivity Tools Enterprise Edition.)

- If you use the option to force PO numbers on orders – 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.



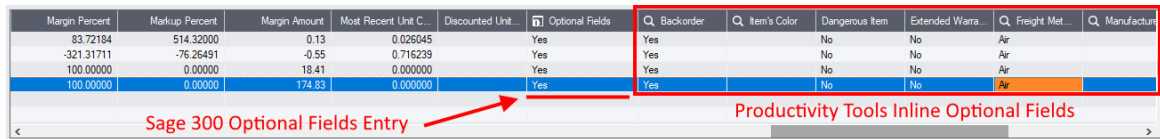
- In this example, the “Requires PO Number . . .” field also appears at the top of the Optional Field list on the Order Entry screen.

Note that the field appears on the Order Entry screen 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).

Display and Edit Optional Fields Inline in the Order Detail Grid

If you have the Enterprise version of TaiRox Productivity Tools, you can display and edit optional fields for order details **inline** in the Extended Order Entry detail grid.



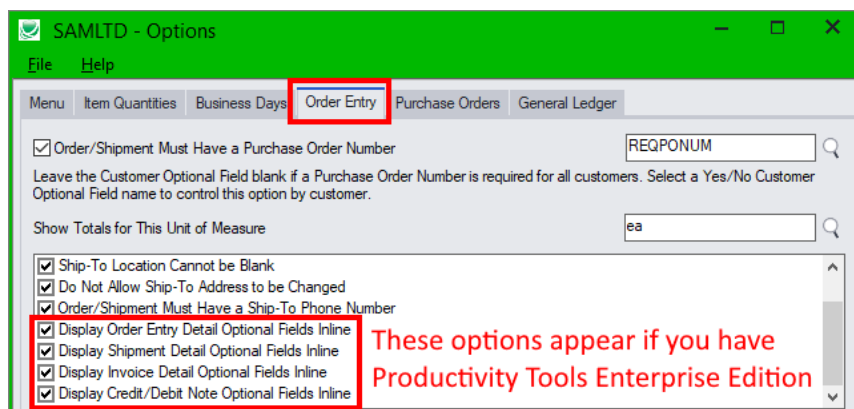
Margin Percent	Markup Percent	Margin Amount	Most Recent Unit C...	Discounted Unit...	Optional Fields	Q Backorder	Q Item's Color	Dangerous Item	Extended Warra...	Q Freight Met...	Q Manufactur...
83.72184	514.32000	0.13	0.026045		Yes	Yes	No	No	No	Air	
-321.31711	-76.26491	-0.55	0.716239		Yes	Yes	No	No	No	Air	
100.00000	0.00000	18.41	0.000000		Yes	Yes	No	No	No	Air	
100.00000	0.00000	174.93	0.000000		Yes	Yes	No	No	No	Air	

Sage 300 Optional Fields Entry Productivity Tools Inline Optional Fields

You choose the option to display optional fields inline in the Productivity Tools Options program – available in the TaiRox Productivity Tools folder on the Sage 300 Desktop.

Adding Detail Optional Fields to the Order Entry Details Grid

- Select the Productivity Tools Options program. Note that you must be using TaiRox Productivity Tools' Enterprise Edition to add optional field columns to the grid.
- Choose the Order Entry tab and then select the extended transaction entry programs where you want to display optional fields. You can add optional fields to the detail grids in Extended Order Entry, Extended Shipment Entry, Extended Invoice Entry, and Extended Credit/Debit Note Entry.



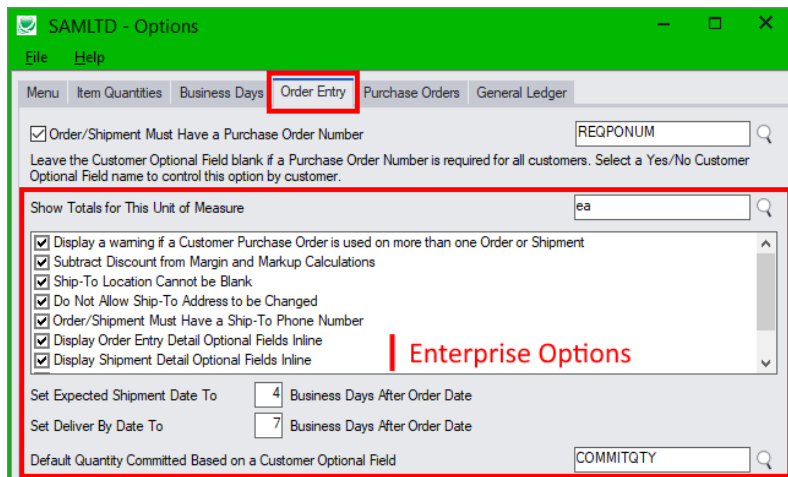
Set Up Other Restrictions and Preferences in TaiRox Options

Extended Order Entry also includes other settings that you can select on the TaiRox Productivity Tools Options screen:

- Warn if a PO is duplicated on an order or shipment.
- Show unit of measure totals on the Extended Order Entry and Extended Shipment Entry screens.
- Include the discount percent set for each order line and for the order as a whole.
- Prevent orders from being posted if the Ship-To Location is blank.
- Prevent users from entering or changing ship-to addresses.
- Require a ship-to phone number on orders and shipments.
- Default the quantity committed on orders to the quantity ordered for select customers.

Setting Up Additional Order Entry Options in Productivity Tools Options

- Select the Productivity Tools Options program.
- Choose the Order Entry tab and then select the options you want – such as displaying a warning for duplicate PO numbers.



See the [Productivity Tools Options User Guide](#) for more information on each of these options.

Margin and Recent Cost Columns

Knowing item and order margins is important when margins are constrained contractually or when the most recent cost may be used rather than a price list. Extended Order Entry saves you time by displaying margin and cost data on the Extended Order Entry screen.

Extended Order Entry's line detail grid includes 4 additional columns for margins and costs. These 4 columns are also displayed when using the Order from History function on the Orders tab in the detail line grid.

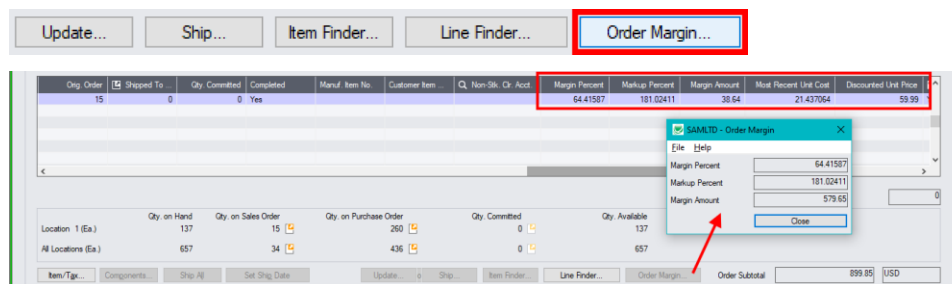
- Margin Percent
- Markup Percent
- Margin Amount
- Most Recent Unit Cost (based on P/O receipts).

You can also include line discounts in margin and markup calculations by selecting the option to “Subtract Discount from Margin and Markup Calculations” in the Productivity Tools Options program.

Note: Users must have Order Entry Item Cost Inquiry rights in order to see the margin columns.

To view Order Margin information for the whole order and for individual lines:

- Click the Order Margin button (below the item quantities) at any time to see the margin on the order as a whole.



Users with an Enterprise license for TaiRox Productivity Tools will also see a Discounted Unit Price, which is calculated by dividing the Discounted Ext. Amount by the Quantity Ordered.

Margin Percent	Markup Percent	Margin Amount	Most Recent Unit Cost	Discounted Unit Price
64.41587	181.02411	38.64	21.437064	59.99

Edit Kit Details Using the Components Button

Some businesses have kits where components or prices change with almost every order, and it is impractical to have each variation be a different kit number.

Edit Kit Details provides a way to edit kit details – right inside an order – without creating new kit numbers.

- You can add or delete kit components and change the component item quantities.
- You can edit detail line optional fields.
- And you can change component unit prices, calculate a new kit price, and enter the new kit price into the order detail line.

To change kit component details and pricing:

- Click the Components button on the Extended Order Entry screen.

The screenshot shows the 'SAM/ITD - Extended Order Entry' window. At the bottom, there is a toolbar with several buttons. The 'Components' button is highlighted with a red rectangle. The main area of the window contains various fields for order information, including Order No., Customer No., and a table of order items with columns like Type, Q, Price, Location, and Qty.

- **Click Yes** when the confirmation message appears to add or delete kit components or change component quantities, pricing, or optional fields.

Click No to change weights, lots or serial numbers. The program will display the Sage 300 Components form.

The screenshot shows a confirmation dialog box titled 'Extended Order Entry'. It contains a question mark icon and the text: 'Do you want to change the components and component pricing for the kit? Choose Yes to change items, quantities, and prices. Choose No to change weights, lots and serial numbers.' At the bottom, there are three buttons: 'Yes', 'No', and 'Cancel'.

Important Note #1: The Components button provides access to two different forms.

- Click the Yes button to display the TaiRox components form to change quantities and pricing and to add or delete component items.
- Click the No button to display the Sage 300 components form to change weights, lots, or serial numbers.

If the kit item has been shipped, the Sage 300 form will be displayed.

- Use the Kit Unit Price field at the top of the form to change the unit price of the kit.

The Kit Unit Price will be automatically updated if you:

- Add or delete kit components.
- Change the kitting quantity for any component.
- Change the component unit price or the extended component price.
- Edit optional fields information for the kit in the top grid.
- In the bottom grid, you can:
 - Change the number of component items in the kit – the Kitting Quantity.
 - Change the unit price of each kit component – the Component Unit Price.
 - Override the calculated total price for this component (override the kitting quantity x component unit price) – the Extended Component Price.

Changes made in the bottom grid will update the Kit Unit Price at the top of the form.

SAMLTD - Kitting Components

File Help

Item Number: #OFFICE SPL KIT Office Supplies Kit Deluxe

Kitting Number: 2 Order UOM: Ea. Qty. Ordered: 2.0000

Kit Unit Price: 64.750000 Pricing UOM: Ea.

Optional Field	Optional Field Description	Value Set	Q. Value	Value Description
BACKORDER	Backorder	Yes	Yes	Yes
COLOR	Item's Color	Yes		
DANGEROUS	Dangerous Item	Yes	No	
EXTWARRANTY	Extended Warranty Available	Yes	No	
FRGHTMETHOD	Freight Method	Yes	Air	Air
MANUFACTURER	Manufacturer	Yes		
PACKER	Packer	Yes		

Lin...	Q. Component ...	Description	Kitting Quantity	Qty. Ordered	Component Unit Price	Extended Component Price
1	A1-650/0	Highlighter	1	2	0.64	0.64
2	A1-655/0	Pen	1	2	1.20	1.20
3	A1-656/0	Pencil	1	2	0.16	0.16
4	A1-751/B	Stapler - Kings-5000 S...	1	2	35.43	35.43
5	A1-752/B	Letter Tray - Kings-50...	1	2	12.95	12.95
6	A1-777/B	Memo Holder - Kings...	1	2	14.37	14.37

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	500	0	500	0	500
All Locations (Ea.)	2,509	0	2,000	0	2,509

Save Close

Note that the price columns in the grid above have been moved from the end of the grid to a position beside the Qty. Ordered field.

- The Kit Unit Price for the kit is automatically recalculated as you change components, and the resulting calculation may represent a new unit price for the kit as a whole.

If necessary, you can change the Kit Unit Price after editing item components.

- Click Save, and then click the close button to update the component quantities and update the unit price for the kit.

If you DO NOT click the Save button first, one of the following messages can appear:

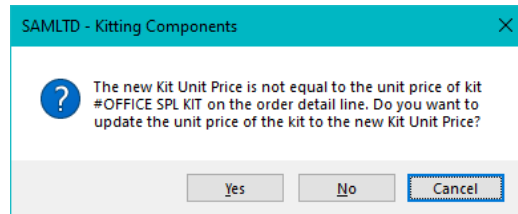
SAMLTD - Kitting Components

Do you want to save changes to the components that make up this kit?

Yes No Cancel

This message appears if you changed kitting component items or component item quantities – even if you also change prices.

- Click Yes to update the order with the new component changes.



This message appears if you changed pricing only, and the Kit Unit Price displayed at the top of the screen does not match the kit price on the order detail line.

- Click Yes to update the order with the new kit unit price changes.

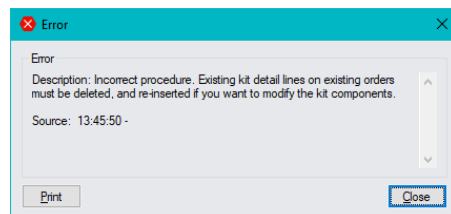
Important Note #2: You cannot change quantities or pricing for posted order lines.

The ability to change kit details operates within restrictions imposed by Sage 300 objects.

Once an order is posted, the TaiRox component form **cannot** be used to change quantities on an existing kit line.

However, you can delete a line after posting and add a new kit line – then change quantities on the new line.

If you try to change quantities or prices on a posted kit line, the following message will be displayed.

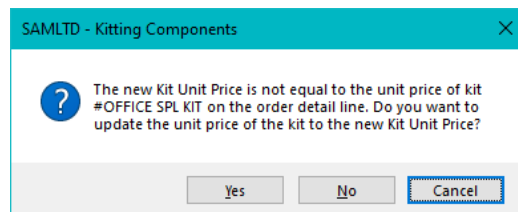


Important Note #3: Pricing data on the Kitting Components form is NOT saved.

The Kit Unit Price, Component Unit Prices, and Extended Component Prices are not saved when you close the Kitting Components form. They are used ONLY during the session to help you calculate a new Kit Unit Price and update the order detail line.

Each time you open the Kitting Components form, the program will read and display the unit prices from the I/C Item Records and calculate a Kit Unit Price at the top of the form based on the calculated Extended Component Prices.

If you previously changed the Kit Unit price, and you reopened Kitting Components form, you will see the following message – even if you made NO price changes.



Do NOT click the Yes button unless you want to revert to reset the Kit Unit Price.

Using the Enhanced BOM Components PopUp

Click the Components button at the bottom of the screen to see the list of components in a bill of material and to check component availability if you need to build more BOM items.

The BOM Components screen displays all components in a BOM and displays the quantities of each components ordered and shipped for this order, as well as the quantities on hand and available for each component at the current location in case you need to build more BOMs.

It also displays (at the bottom of the screen) item quantities on hand, on sales order, on purchase order, committed, and available for the current location and all locations for the item you select in the grid.

To view BOM Components and Quantities:

- Highlight the order line for the BOM and click the Components button to see BOM components and component quantities.

The screenshot shows the 'SAMLTD - BOM Components' window. At the top, there is a toolbar with buttons: 'Item/Tax...', 'Components...' (highlighted with a red box and an arrow pointing down), 'Ship All', 'Update...', 'Ship...', 'Item Finder...', 'Order Margin...', and 'Line Finder...'. Below the toolbar is a table with the following data:

Component Item Number	Description	Unit of Measure	Qty. Ordered	Qty. Shipped	Qty. On Hand	Qty. Available	Component's BOM
F3(HUNTS-2500)T	Kings 5000 Series Desk...	Ea.	1	0	0	0	3
A1-310/O	Halogen Desk Light	Ea.	1	0	128	128	
A1-655/O	Pen	Ea.	1	0	998	998	
A1-656/O	Pencil	Ea.	1	0	498	498	
A1-751/B	Stapler - Kings-5000 Ser...	Ea.	1	0	98	98	
A1-752/B	Letter Tray - Kings-5000...	Pkg	1	0	-2	-2	
A1-753/B	Paper Clip Dispenser - K...	Ea.	1	0	59	59	
A1-754/B	Tape Dispenser - Kings...	Ea.	1	0	50	50	
A1-760/O	Paper Clips	Box	10	0	30	30	
A1-777/B	Memo Holder - Kings-50...	Ea.	1	0	17	17	
A1-779/B	Calendar Holder - Kings...	Ea.	1	0	-1	-1	
A1-780/B	Glass Desk Shelf - King...	Ea.	1	0	39	39	

Below the table, there is a section for 'Qty. On Hand', 'Qty. On Sales Order', 'Qty. On Purchase Order', 'Qty. Committed', and 'Qty. Available' for 'All Locations'. The values are all 0. A 'Details...' button is at the bottom left.

- The Qty Ordered column shows the number of component items are included in this order.
- The Qty On Hand shows the number of component items in inventory (not including items that have already been assembled in BOMs).
- Items in yellow have insufficient quantities on hand to build new assemblies if you need them.
- In this case, the top item in the BOM Components list above is a subassembly BOM. Click the Details button or double-click the line in the grid to display the subassembly components.
- You can also see that the top line has zero quantities on hand – again, this is not including subassemblies that have already been assembled in BOMs.

The quantities for all locations are displayed at the bottom of the screen – in this case, also for the subassembly in the top line. You can select other lines in the grid to view quantities at all locations.

Quick Forms Printing (O/E Forms Button)

The O/E Forms button lets you quickly print a number of order and shipment-related forms without posting an order or navigating to another window. See the next section – [Print Picking Slips Fast](#) – for an even faster way to print picking slips directly.

The screenshot shows the 'SAMLTD - Extended Order Entry' window. The 'O/E Forms' button is highlighted in the bottom right corner of the window. The window displays various fields for order entry, including Order No., Customer No., PO No., Status, and a list of items with their descriptions, quantities, and prices. The 'O/E Forms' button is located in the bottom right corner of the window, next to the 'Close' button.

To print OE forms

- Click the O/E Forms button.

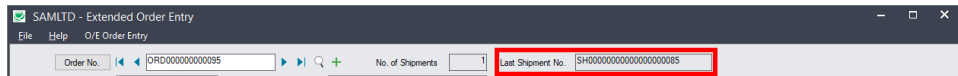
The following form appears. Click the buttons on the right to use the Sage 300 printing functions and the Productivity Tools Email Packing Slip function.

The screenshot shows the 'SAMLTD - O/E Forms' window. The window displays fields for Order Number, Shipment Number, Invoice Number, and Shipment Number, along with buttons for Print Order Confirmation, Print Quote, Print Picking Slip, Print Invoice, Email Packing Slip, and Close.

For quotes, the form will be pre-populated as follows:

The screenshot shows the 'SAMLTD - O/E Forms' window. The window displays fields for Order Number, Shipment Number, Invoice Number, and Shipment Number, along with buttons for Print Order Confirmation, Print Quote, Print Picking Slip, Print Invoice, Email Packing Slip, and Close.

- You must select a shipment number for the Print Picking Slip and Email Packing Slip functions.
By default, the Last Shipment Number (displayed at the top of the Extended Order Entry screen) will be used unless you change it.



Selecting the Email Packing Slip choice

Productivity Tools lets you email customers packing slips for each shipment. When you click the Email Packing Slip button, the following form appears:

SAMLTD - Email Packing Slips

File Help

Use Slip: OEPACKSHIPMENT1.RPT [Browse]

Sort By: Line Number

From Shipment Number: SH00000000000000000085

To Shipment Number: SH00000000000000000085

Message ID: PACKING

☐ Print Serial/Lot Numbers

☐ Print Kit Component Items

☐ Print Bills Of Material Component Items

Email To: Email Address Entered

Email: ronaldblack99@hotmail.com; receiving@black.com

Progress

Send Close

- Select the Crystal report form for packing slips.
- Confirm the shipment number. By default, this is the Last Shipment Number for the order (displayed at the top of the screen).
- Select the Message for the Packing Slip. You can edit messages using the O/E E-mail Messages program, or click the Zoom button beside the Message ID field to load the form.
- Select what you want to appear on the packing slip: serial/lot numbers, kit component items, or BOM component items.
- Specify an email recipient or select the customer or ship-to email addresses for sending packing slips. The customer and ship-to email addresses come from the A/R customer account.

If you choose “Email Address Entered”, enter the recipient’s email address.

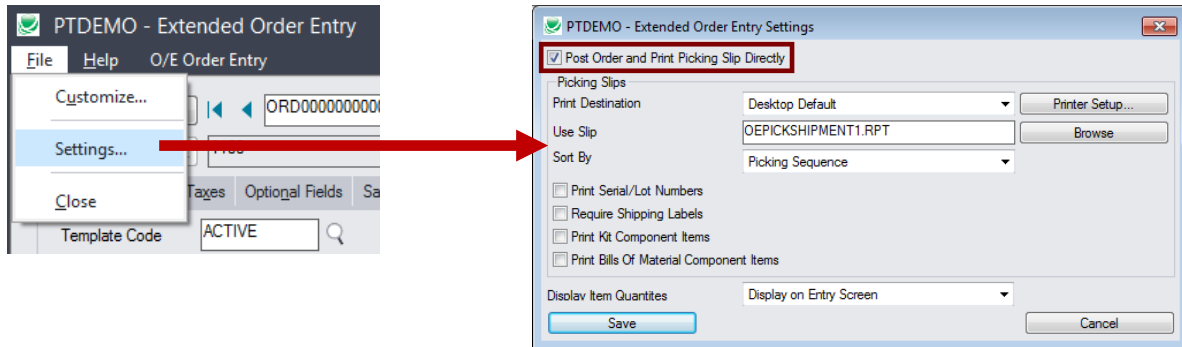
You can separate multiple email addresses with a semi-colon, comma, or blank space.

For more information on emailing packing slips, see the [Email Packing Slips User Guide](#).

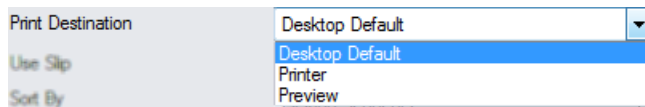
Print Picking Slips Fast

Extended Order Entry lets you streamline the printing of picking slips when you need to print large numbers of them as quickly as possible.

Use the Settings choice on the Extended Order Entry File menu to select picking slip default settings, so you don't need to answer the setup questions in a pop-up dialog box:



- Select the first checkbox at the top of the form to change picking slip printing behavior.
- Choose the Print Destination for picking slips. These settings bypass the setup and print picking sequence dialogs.
 - Choose the Preview setting to do a final preview before printing



Quick PJC Entry

To speed up data entry, Extended Order Entry will default inserted lines to the previous entry's selections for Contract, Project and Category when multiple lines use the same selections.

The following form shows how the order form appears immediately after pressing the Insert key to create the second line (with default values for the Contract, Project, Category and Cost Class fields):

PTDEMO - Extended Order Entry

File Help O/E Order Entry

Order No. *** NEW *** No. of Shipments 0 Last Shipment No.

Customer No. 1200 Mr. Ronald Black Last Invoice No.

Order Customer Taxes Optional Fields Sales Split Rates Totals * Required

Template Code ACTIVE PO No. Status: Entered By:

Order Date 01/10/2020 ☐ On Hold

Order Type Active ☐ From Multiple Quotes ☐ Job Related ☐ Project Invoicing ☐ Retainage

Ship-To Location Location 1 Central warehouse - Seattle

Deliver By 01/10/2020 Exp. Ship Date 01/10/2020 ☒ Calc. Tax

Ship Via CCT Cross-Country Trucking Lines Tracking No.

Description Reference

Type	Contract	Project	Category	Cost Class	Item No.	Misc. Charge	Kt/BOM	Description
Item	120-1200-10	1006	PRCHCABINET	Material	F1-470/T			Filing Cabinet - 4...
Item	120-1200-10	1006	PRCHCABINET	Material				

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0

Item/Tax... Components... Ship All Update... Ship... Item Finder... Order Margin... Order Subtotal 0.00 USD

Post Create PO Delete History... Prepayment... Create Purchase Order... Order from History... O/E Forms... Close

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha...	Qty. On Sales O...	Qty. Available

View Order Prepayments

Although the Order Entry screen lets you add a prepayment to an order, Sage 300 doesn't provide a way to view the prepayments that have been entered for orders.

The TaiRox Prepayments button on the right side of the Extended Order Entry screen lets you view all prepayments entered for an order using the Order Entry screen or using the Accounts Receivable Receipt Entry screen.

To view order prepayments:

- Click the Prepayments button at the bottom of the screen.

The screenshot shows the 'Extended Order Entry' window. At the bottom, there is a row of buttons: 'Post', 'Create PO', 'Delete', 'History', 'Prepayment...', 'Backorders...', 'Prepayments...', 'Create Purchase Order...', 'Order from History...', 'O/E Forms...', and 'Close'. The 'Prepayments...' button is highlighted with a red rectangle.

- The program displays a pop-up form that lists all prepayments for the order – 1 in the following example:

The 'Prepayments' pop-up window displays a table with the following data:

Apply To	Document Number	Payment Date	Posting Date	Customer Currency Code	Payer	Payment in Customer Currency	Amount Remaining	Batch Number	Entry Number
Order No.	ORD0000000000085	2022-12-06	2022-12-06	USD	Mr. Ronald Black	3,890.45	3,890.45	66	2

At the bottom right, there are summary fields: 'Total' 3,890.45 and 'Amount Remaining' 3,890.45. A 'Close' button is at the bottom right.

In this example, the prepayment is for one half of the order amount.

- Click the Batch Number or Batch Entry column heading to drill down to the receipt entry in Accounts Receivable.

Note that you cannot drill down to the order from this screen because the order is already open.

The 'SAMLTD - A/R Receipt Entry' window shows the following details for the prepayment:

- Batch Number:** 66
- Batch Date:** 2020-08-30
- Bank:** CCB
- Entry Number:** 2
- Transaction Type:** Prepayment
- Customer Number:** 1200
- Reference:**
- Payment Code:** MASTER
- Document Number:** PP000000000000000019
- Receipt Amount:** 5,000.00 CAD
- Apply By:** Order Number
- Prepayments:** 2
- Total Amount:** 5,000.000
- Deposit Number:** 53
- Deposit Date:** 2020-08-30
- Entered By:** ADMIN
- Receipt Date:** 2022-12-06
- Posting Date:** 2022-12-06
- Customer:** Mr. Ronald Black
- Currency:** USD
- Account Set:** USA
- Check/Receipt No.:** 564564
- Customer Amount:** 3,890.45 USD
- Apply To:** ORD00000000000085

Create Purchase Orders

TaiRox Create Purchase Order provides a flexible and robust way to create POs from orders or quotes.

Where Sage 300 lets you blindly create purchase orders from orders, TaiRox extends this functionality by letting you preview the inventory items on-screen and edit item quantities, vendors and other data before you create the PO.

Create Purchase Order:

- Lets you create new POs or add lines to existing POs.
- Lets you add PO description and reference information for the PO.
- Lets you add Order Comments and Instructions to PO Comments and Instructions.
- Provides default settings to control reference/description field defaults: Blank, Order Number, etc.
- Provides settings to control the default selection (yes/no) for stock and non-stock items.
- Creates POs for component items of Kits and BOMs – displaying item quantities for BOMs within BOMs.
- Enables optional field merging for the PO, for PO lines, and for Kit/BOM items.
- Displays status messages when there is no vendor for an item.
- Creates multiple or combined purchase orders.
- Provides convenient drill-down to purchase orders after creation.
- Lets you cherry-pick POs for creation.
- Lets you print new POs after they are created.

Creating Purchase Orders

Click the Create Purchase Order button at the bottom of the Extended Order Entry screen.

Note: *The button is greyed out unless the OE order or quote is Posted, Active, and not On Hold.*

The screenshot shows the 'SAMLTD - Extended Order Entry' window. The 'Order No.' field contains 'ORD00000000000000000000'. The 'Customer No.' field contains '1200'. The 'PO No.' field contains '7878686'. The 'Status' field is set to 'Posted'. The 'Order Date' is '2022-12-06'. The 'Order Type' is 'Active'. The 'Ship-To Location' is 'Central warehouse - Seattle'. The 'Deliver By' date is '2022-12-06'. The 'Ship Via' is 'CCT'. The 'Description' is 'Drop-shipped items to Black - December 2022'. The 'Reference' field is empty. The 'Optional Field' section shows 'Customer Credit Warning' as 'No', 'Require PO Number on Orders and Shipments' as 'Yes', 'Preferred Shipping Method' as 'FEDEX for Expedited or unde...', 'UPS Zone' as 'WHI', and 'User Note' as 'Allow greater volume discount'. The 'Item' table lists the following items:

Type	Q	Item No. / Mac. Charge	Q	Kit BOM	Description	Q	Price List	Q	Location	Deliver By	Exp. Ship Date	Qty. Ordered	Q	Order UOM	Q	Order Weight UOM	Price By	Pricing UOM
Item		A1-751/B			Stapler - Kings-5...	USA	1			2022-12-06	2022-12-06	120	Ea			lbs.	Quantity	Ea
Item		S1-200/B			Flat Screen 56 ...	USA	1			2022-12-06	2022-12-06	20	Ea			lbs.	Quantity	Ea
Item		#OFFICE SPL KIT	2		Office Supplies ...	USA	1			2022-12-06	2022-12-06	10	Ea			lbs.	Quantity	Ea
Item		S1-300/Y			Curved Screen ...	USA	1			2022-12-06	2022-12-06	15	Ea			lbs.	Quantity	Ea
Item		S1-200/Y			Flat Screen 56 ...	USA	1			2022-12-06	2022-12-06	5	Ea			lbs.	Quantity	Ea

The 'Qty. on Hand' for 'Location 1 (Ea)' is 0. The 'Qty. on Sales Order' is 130. The 'Qty. on Purchase Order' is 120. The 'Qty. Committed' is 0. The 'Qty. Available' is 0. The 'Order Subtotal' is 10,402.25 USD. The 'Create Purchase Order' button is highlighted with a red box and a green arrow pointing to it.

A new window appears to show you the purchase orders that will be created from the items on the order or quote, and let you change how you want to create the POs. If one of the items on the order is a Kit or BOM, the individual component items will appear on the Create Purchase Orders form, as below:

Create PO	PO Number	Line No.	Kit/BOM Component	Item Number	Item Description	Location	Quantity	Q	UOM
No	PO000000045	1		A1-751/B	Stapler - Kings-5000 Ser...	1	120		Ea.
No	PO000000045	2		S1-200/B	Flat Screen 5'6 H x 5'W	1	20		Ea.
No		3	Yes	A1-650/0	Highlighter	1	10		Ea.
No		3	Yes	A1-655/0	Pen	1	10		Ea.
No		3	Yes	A1-656/0	Pencil	1	10		Ea.
No	PO000000045	3	Yes	A1-751/B	Stapler - Kings-5000 Ser...	1	10		Ea.
No		3	Yes	A1-752/B	Letter Tray - Kings-5000 ...	1	10		Pkg.
No		3	Yes	A1-777/B	Memo Holder - Kings-50...	1	10		Ea.
No	PO000000045	4		S1-300/Y	Curved Screen 5'H x 6'W	1	15		Ea.
No		5		S1-200/Y	Flat Screen 5'6 H x 5'W	1	5		Ea.

Use the scroll bar at the bottom of the screen to display more information fields, including item quantities at the current location and at all locations.

Sage 300 lets you create nested BOMs where one or more of the items in a bill of materials is also a BOM. The following example shows how Create Purchase Orders displays items for nested BOMs.

Create PO	Status	PO Number	Line No.	Kit/BOM Component	Item Number	Item Description	Location	Quantity	Q	UOM	Unit Cost	Q	Ver
No			1		A1-103/0	Fluorescent Desk Lamp	1	15		Ea.			1200
No			2	Yes	A1-103/0	Fluorescent Desk Lamp	1	10		Ea.			1200
No			2	Yes	A1-655/0	Pen	1	10		Ea.			1350
No			2	Yes	A1-656/0	Pencil	1	10		Ea.			1400
No			2	Yes	A1-750/0	Stapler - Image-1500 Series	1	10		Ea.			1450
No			2	Yes	A1-755/G	Letter Tray - Image-1500 Series	1	10		Pkg.			1500
No			2	Yes	A1-756/G	Pencil Cup	1	10		Ea.			1540
No			2	Yes	A1-757/G	Paper Clip Dispenser - Image-1500 Series	1	10		Ea.			1580
No			2	Yes	A1-758/G	Tape Dispenser - Image-1500 Series	1	10		Ea.			1750
No			2	Yes	A1-759/G	Memo Holder - Image-1500 Series	1	10		Ea.			1755
No			2	Yes	A1-760/0	Paper Clips	1	100		Box			1890
No			2	Yes	A1-778/G	Business Card File - Image-1500 Series	1	10		Ea.			2150
No			2	Yes	A1-500/0	Hanging File Folder	1	100		Pkg.			2235
No			2	Yes	F2-100/L	Plastic Drawer Labels	1	40		Ea.			2300
No			2	Yes	F2-101/L	Hanging Folder Bars	1	40		Ea.			2800
No			2	Yes	F2-102/0	File Folder Labels	1	50		Box			3050
No			2	Yes	F2-103/0	File Folders	1	50		Box			4000
No			2	Yes	F2-120/L	Controlling Lock	1	10		Ea.			4030
No			3	Yes	A1-650/0	Highlighter	1	20		Ea.			

- Line 2 of the order is for 10 units of item A2(IMAGE-1500)G – which is a BOM that includes nested BOM F3(HUNTS-2500)T.
- The window with the green border shows all components of A2(IMAGE-1500)G.
- The nested BOM items are listed after all other BOM items – and show properly adjusted quantities.

For example, the order included 10 units of BOM A2(IMAGE-1500)G – and the nested BOM F3(HUNTS-2500)T includes 10 Pkgs of hanging file folders, for an PO quantity of 100 pkgs.

At this point, you can “cherry-pick” items for purchase order creation by double-clicking the Create PO column – then click the Create Purchase Orders button at the bottom of the form to generate POs.

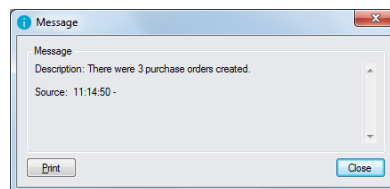
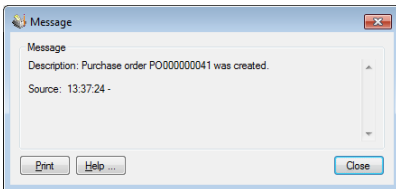
- Use the Select All and Select None buttons below the grid to set all items to Yes for Include on POs or No to exclude.



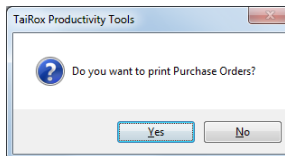
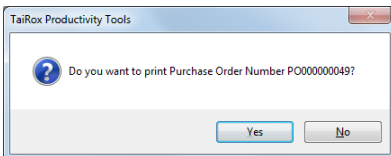
- Double-click in the Create PO column to “cherry-pick” items for purchase orders:

Create ...	PO Number	Line No.	Kit Component	Item Number	Item Description	Location	Quantity	Q UOM	Unit Cost	Q Vendor
No		1		C1-220/B	Krugg 220 Arm...	1	10	Ea.		2800
Yes		2		A1-310/0	Halogen Desk...	1	10	Ea.		8830
No		3		A1-103/0	Fluorescent D...	1	10	Ea.		1580
No		4		C2-740/Y	7400 Series P...	1	10	Ea.		2800

- Note in the grid above that there are four items. Lines 1 and 4 are for the same vendor, so they will be added to the same PO if you create POs for all items.
- Click the Create Purchase Orders button at the bottom of the screen to create one purchase order per vendor. The form will be updated to show the PO Number of the newly created purchase orders and a message will appear stating the PO number – or stating how many POs have been created if it created more than one.



- Click “Yes” to print new purchase orders, or “No” to continue.



- If there is an issue creating a Purchase Order, the Status column will show the reason why the line items cannot be added to the purchase order (for example, "Item vendor not defined" when Using Item Vendor Information option).
- The Create Purchase Order function will create a PO for an item that is a component of a Kit or BOM if that Kit/BOM is on the Sales Order.

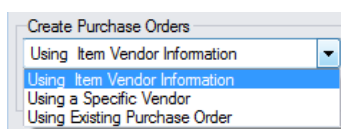
Note regarding Kit/BOM items: IC6.2A and higher added support for a default BOM number.

- If a default BOM number is defined for an item, and the BOM number is not set on the order line, the default BOM number defined for the item will be used to create a purchase order.
- If there is no default BOM number, and the BOM number on the order line is not set, then the first BOM number will be used to create a purchase order.

Changing how POs are created

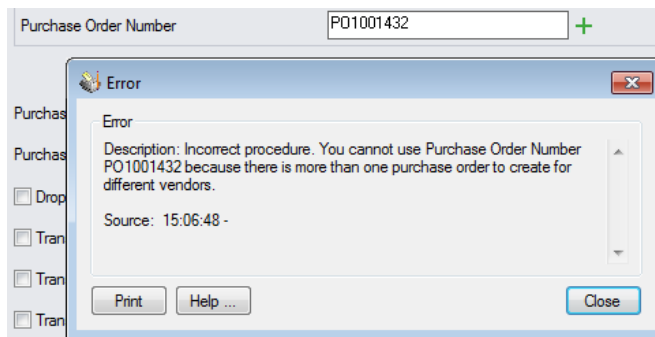
Choose vendor or existing purchase order

Create Purchase Orders provides three main options for creating purchase orders:



- If you select Using Item Vendor Information, the item's preferred vendor (if there is one) will be the default vendor. If there is no preferred vendor, Vendor 1 will be the default vendor.
 - You can override the "Vendor Number" for each line if you choose.
- If you choose "Using a Specific Vendor", you **must** enter a Vendor Number.
 - The "Vendor Number" for each line is set to the Vendor Number you enter.
 - You can override the "Vendor Number" for each line if you choose.
 - If there is the same vendor number in every detail line, you override the automatically generated purchase order number by entering your PO number in the Purchase Order Number field.

- **If you override the Purchase Order Number** and there is more than one vendor involved, an error message will appear:



If you want to override purchase order numbers and multiple vendors are involved, select Yes/No in the first column of the grid (Create PO) and process the items one vendor at a time.

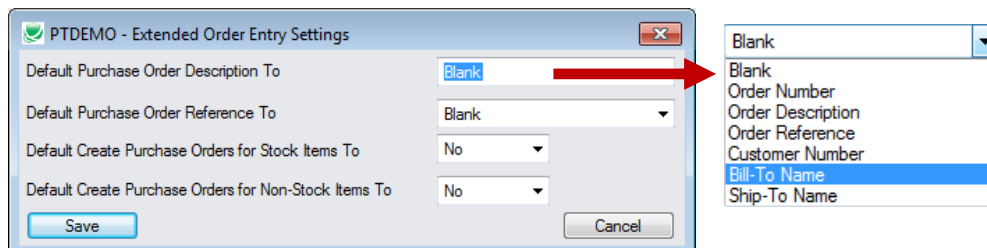
- If you select "Using Existing Purchase Order", this determines a specific vendor and the same restrictions apply.

- Use the Finder beside the Purchase Order Number field to select a PO.
- Use the Drill Down button beside the Finder button to check the PO **after** you choose it from the Finder.

Setting default PO descriptions, comments, instructions, and options

You can select the default settings for options and for adding descriptions, comments and instructions to the new purchase orders. You can also change the settings for items as you select them.

- Select **File > Settings** from the Create Purchase Orders screen to display default settings.



Shipping Quantities by Picking Sequence and Filtering Items

The Ship button lets you display items in picking sequence order, item number order, or by location and filter them by ranges of order fields.

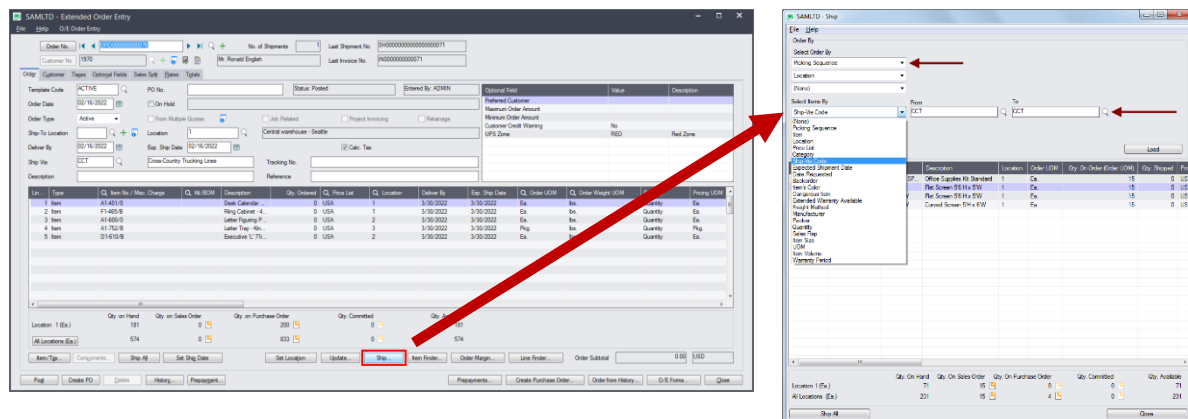
For example, the following screens show items ordered by Picking Sequence and selected by Ship-Via code.

Ship by Picking Sequence functionality is very useful when a large order has been picked and now the picked items have to be recorded as shipped.

- The picking slip is in picking sequence order with quantities marked.
- The order entry form is displayed in line number order.

Matching and recording the entries from the picking slip is far easier when you list the items in picking sequence order.

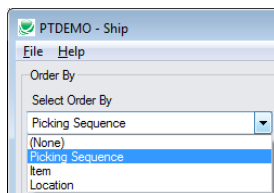
Item selection makes it easier to record partially shipped orders – in this case, where all items with the same Ship-Via code are in one shipment.



- Click the Ship button to filter items and display them in the order you want –by location, item or picking sequence.
- Order items by picking sequence, item number, or location.
- Select items by picking sequence, item, location, price list, category, ship-via code, expected shipment date, date requested, backorder – or by order details optional fields (shown above).

To use the Ship button to enter quantities:

- Click the Ship button to display the Ship form.
- Select the primary order for listing items.



You can choose by Picking Sequence, Item, or by Location.

- Choose the next sorting levels if you require a multi-level sort – such as by Item number and location.

- Choose a field for selecting a range of items.

You can choose picking sequence, item, location, price list, category, ship-via code, expected shipment date, date requested, backorder – or order details optional fields.

- Click the Load button to display selected items in the order you chose (in this case, items shipped by CCT displayed in picking sequence).

Line Number	Picking Sequence	Item	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped	Price
1	0010	C1-220/B	Krugg 220 Arm Tilter-Brown	1	Ea.	10	0	US
4	0023	C2-740/Y	7400 Series Posture Chair	1	Ea.	25	0	US
3	0040	A1-103/0	Fluorescent Desk Lamp	1	Ea.	8	0	US
2	0041	A1-310/0	Halogen Desk Light	1	Ea.	15	0	US

- Enter quantities in the Qty. Shipped column.
 - You can enter the picked entries quickly using the Tab or Enter keys to move down the column.

Line Number	Picking Sequence	Item	Description	Location	Order UOM	Qty. On Order (Order UOM)	Qty. Shipped
1	0010	C1-220/B	Krugg 220 Arm Tilter-Brown	1	Ea.	10	10
4	0023	C2-740/Y	7400 Series Posture Chair	1	Ea.	25	0
3	0040	A1-103/0	Fluorescent Desk Lamp	1	Ea.	8	0
2	0041	A1-310/0	Halogen Desk Light	1	Ea.	15	0

- Click the Ship All button at the bottom of the form to fill in the Qty. Shipped field for all items with the Qty. On Order.

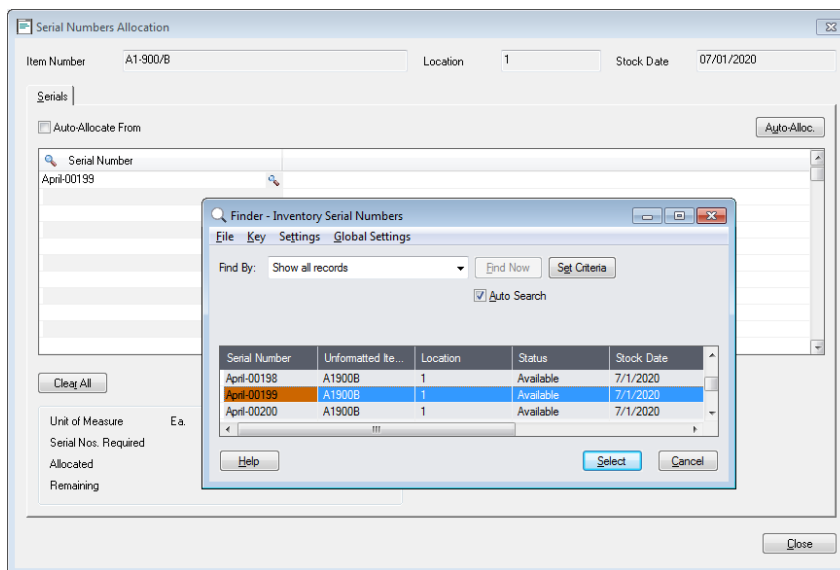
	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	71	15	0	0	71
All Locations (Ea.)	231	15	4	0	231

Ship All Close

- When you close the Ship form, the Qty. Shipped numbers in the order entry form will be updated with the item quantities that you entered.

Note:

If you change the quantity shipped for an item with a serial number you may see a pop-up Sage 300 windows like the following, allowing you to pick the serial number from the Finder.

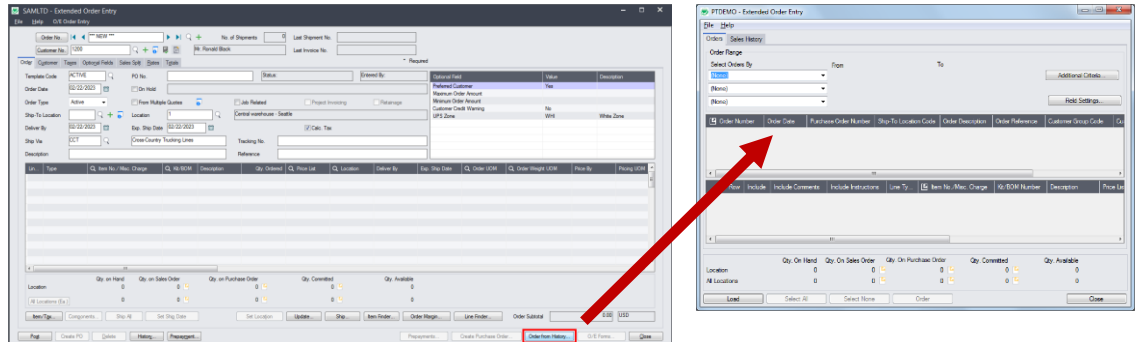


Order from History

The Order from History window lets you quickly create new orders for a customer based on previous customer orders.

Using Order from History also tends to increase average order size while decreasing the number of orders processed per dollar of order. The result is lower shipping costs and other operational efficiencies.

- Click the Order From History button to display the pop-up window showing previous orders.



You can select items from previous purchase orders, update quantities, and copy the selected information into a standard line item row.

Note: The Order from History button is only enabled once the customer has been entered on the form.

To create a new order from prior ones using the Order tab on the popup form

- Click the "Order from History" button. Order from History... The form that appears has two tabs:
 - The Orders tab lets you select items from previous orders.
 - The Sales History tab is similar, allowing selection of items.

We'll trace through a typical sequence for the Orders tab.

- Use the range fields to select past orders for the customer, and then click the Load button. In this case, we've chosen orders since January 1, 2019. (You can add or remove fields from the range field dropdown lists using the [Field Settings](#) button – see below.)

- Click any order in the top grid to see the order details in the bottom grid.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the items in the previous order.

- Double-click the Include column to select individual lines (the Include column displays Yes).

Line Num...	Include	Include Comments	Include Instructions	Line Ty...	Item No./Misc. Charge	Kit/BOM Number	Description	Price Lis
1	Yes	No	No	Item	C1-220/B		Krugg 220 Am ...	CANADA
2	No	No	No	Item	A1-310/0		Halogen Desk Li...	CANADA
3	Yes	No	No	Item	A1-103/0		Fluorescent Des...	CANADA
4	No	No	No	Item	C2-740/Y		7400 Series Pos...	CANADA

- Edit the **Qty. Ordered** column to change the quantities for the new order that you are creating. (The Original Quantity Ordered field shows the quantities from the previous order.)

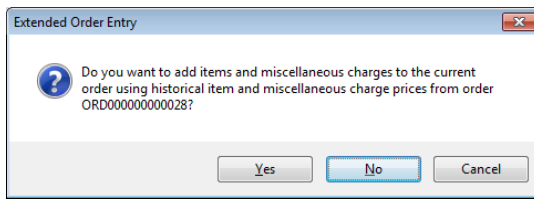
Number	Description	Price List	Location	Order UOM	Original Quantity Ordered	Qty. Ordered	Order Unit Price	Order Unit Cost	Margin A
	Krugg 220 Am ...	CANADA	1	Ea.	10	15	0.000000	178.605385	
	Halogen Desk Li...	CANADA	1	Ea.	10	0	0.000000	34.680703	
	Fluorescent Des...	CANADA	1	Ea.	10	10	0.000000	29.121971	
	7400 Series Pos...	CANADA	1	Ea.	10	0	0.000000	0.000000	

- When you have finished editing items from this order, click the Order button at the bottom of the screen to add the items to the new sales order.
- Select another order from the top grid, choose the items that you want to order, enter the new quantities, and again click the Order button.
- Click the Close button when you have finished adding items from prior orders.

Lin...	Type	Q Item No / Misc. Charge	Q Kit/BOM	Description	Q Price List	Q Location	Deliver By	Exp. Ship Date	Qty. Ordered	Q Ord
1	Item	C1-220/B		Krugg 220 Am Tilt-Brwn	CANADA	1	1/10/2020	1/10/2020	15 Ea.	
2	Item	A1-103/0		Fluorescent Desk Lamp	CANADA	1	1/10/2020	1/10/2020	10 Ea.	
3	Item	#OFFICE KIT	1	Office Furniture Kit Stand...	USA	1	1/10/2020	1/10/2020	1 Ea.	
4	Item	A1-310/0		Halogen Desk Light	USA	1	1/10/2020	1/10/2020	15 Ea.	
5	Item	A2(IMAGE-1500)G		Image 1500 Series Desk ...	USA	3	1/10/2020	1/10/2020	2 Ea.	

The order screen grid will be populated with line items from the historical order

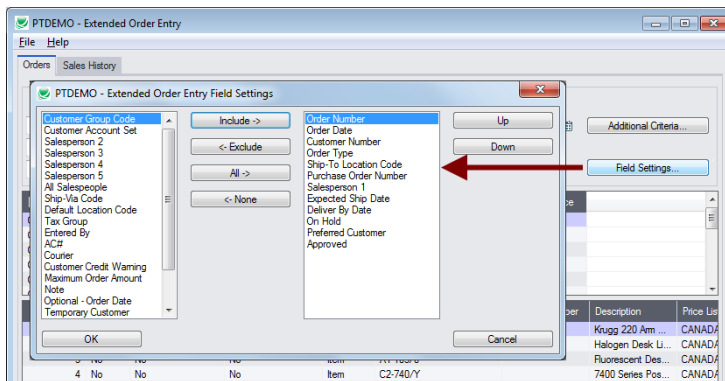
If security is enabled and the user has Unit Price Override rights, then a confirmation and completion messages will appear.



Important Note: Yes means use historical prices. No means that current pricing will be in effect.

Use the “Field Settings” button to customize the list of fields for selecting orders:

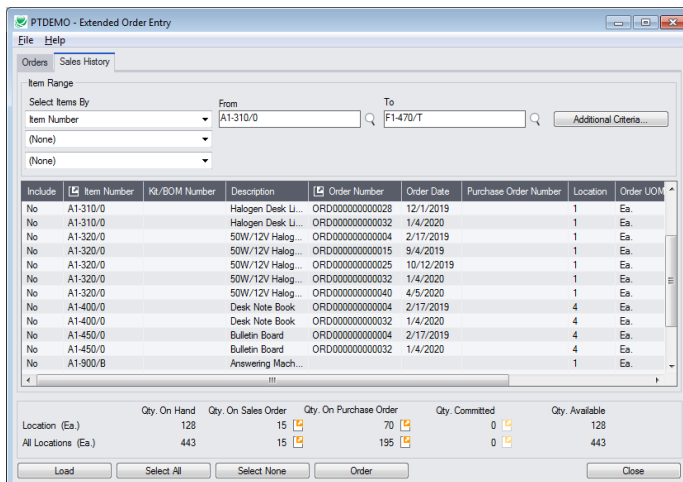
Click the **Field Settings** button to change the fields that appear in the “Select Orders By” dropdown lists on the Order From History screen.



- The list of fields on the right are the fields that will appear in the Select Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

Using the Sales History tab

The Sales History tab allows a similar sequence of operations – selecting, editing of quantities and copying to the new sales order.

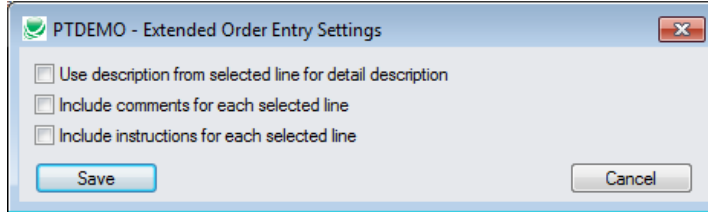


- Select the range of item numbers, order numbers, order dates, PO numbers, or categories that you want to use as search criteria, then click the Load button.
- See the steps listed above for including items from history on the new order.

Setting default descriptions, comments and instructions for included items

You can select the default settings for taking descriptions, comments and instructions from the original orders. You can also change the settings for each item as you select them.

- Select **File > Settings** from the Order From History screen.



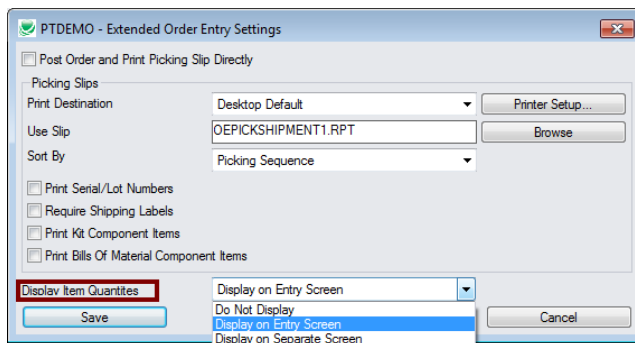
- Select the checkboxes if you want them to be included by default from the original sales orders.

Item Quantities

The Item Quantities feature lets you display item quantities available at all inventory locations – including locations in other companies – while entering an order.

To display quantities for multiple locations and companies:

- Select the **Extended Order Entry > File > Settings** menu choice to change the Item Quantities display settings.



- **Do Not Display** – shows only total quantities and quantities for the current line item location – like the standard Order Entry screen.

Location 1 (Ea.)	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
	80	20	20	0	80
All Locations (Ea.)	235	20	24	0	235

Item/Tax... Components Ship All Set Ship Date Set Location Update... Ship... Item Finder... Line Finder... Order Margin... Order Subtotal 10,402.25 USD

Post Create PO Delete History Prepayment... Backorders... Prepayments... Create Purchase Order... Order from History... O/E Forms... Close

- **Display on Entry Screen** – includes a grid at the bottom of the screen that displays quantities at all locations, in the current company and any associated companies.

Item/Tax...		Components		Ship All		Set Ship Date		Set Location		Update...		Ship...		Item Finder...		Line Finder...		Order Margin...		Order Subtotal		0.00		USD					
Post		Create PO		Delete		History...		Prepayment...		Backorders...		Prepayments...		Create Purchase Order...		Order from History...		O/E Forms...		Close									
Database ID		Location		Description		Item Number		Description		Stocking Unit		Qty On Hand		Qty On Purcha		Qty On Sales O		Qty Available		Qty Committed		Qty Available In		Qty On Hand (All)		Qty On Purcha		Qty On	
SAMINC		1		Central warehouse		A1-105/O		13W Mini Fluor...		Ea		75		105		15		75		0		60		387		500.535			
SAMINC		2		Portland Office		A1-105/O		13W Mini Fluor...		Ea		143		30		8		143		0		135		387		500.535			

- **Display on Separate Screen** – displays the item quantities at all locations in a separate window.

Location	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	181	13	200	0	181
All Locations	574	13	833	0	574

Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purchase	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale	Qty. On Hand (All)	Qty. On Purchase	Qty. On Sales
1	Central warehouse - Seattle	A1-401/0	Desk Calendar	Ea.	181	200	0	181	0	181	574	833	
2	Portland Office	A1-401/0	Desk Calendar	Ea.	136	233	0	136	0	136	574	833	
3	Newark, New Jersey	A1-401/0	Desk Calendar	Ea.	170	200	0	170	0	170	574	833	
4	Port of San Francisco	A1-401/0	Desk Calendar	Ea.	87	200	0	87	0	87	574	833	
1	Central warehouse - Seattle	A1-401/0	Desk Calendar	Ea.	181	200	13	181	0	168	574	833	

Click the All Locations button to move the Quantities in front of other windows (if hidden).

All Locations

The All Locations button appears at the bottom of the Extended Order Entry screen if you choose to display quantities on a separate screen.

Item Quantities will be refreshed as you move to other detail lines.

Selecting which companies and locations are displayed

An administrator must first set up the Sage 300 company databases and locations that are displayed in the Item Quantities grid.

- Go to **TaiRox Productivity Tools > Options**, and click the Item Quantities tab.

Database ID	Description	User ID	Password	Location
SAMLTD	Sample Company Limited	sa		1
SAMINC	Sample Company Inc.	sa		1
SAMINC	Sample Company Inc.	sa		2
SAMLTD	Sample Company Limited	sa		2
PTDEMO	Productivity Tools Demo	sa		

- Use the Insert and Delete keys to add or remove locations and companies from the Item Quantities grid and to change the order that locations appear.
- Note for Sage 2023 PU2 and higher:** Item data will **NOT** appear unless the user ID and password have sufficient permissions to access the Sage 300 Vault database as well as the individual company DBs.

Each user can customize the item quantities grid by hiding and moving columns to suit their own needs.

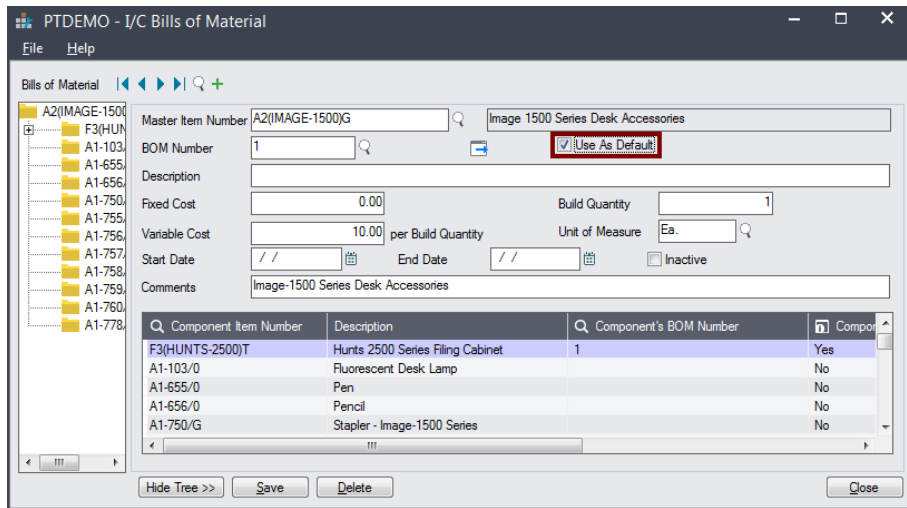
For example:

- You can hide the Database ID and Name columns if all locations are in the same Sage 300 company.
- You can also hide the Item Description and Stocking Unit if these are the same at all locations. Hide and re-arrange columns by dragging and dropping.

Location	Description	Item Number	Qty. On Hand	Qty. On Purchase	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale	Qty. On Hand (All)	Qty. On Purchase	Qty. On Sales
1	Central warehouse	A1-103/0	137	160	10	137	0	127	657	286	
2	Portland Office	A1-103/0	262	0	9	262	0	253	657	286	
3	Newark, New Je...	A1-103/0	42	126	0	42	0	42	657	286	
4	Port of Vancouver	A1-103/0	206	0	11	206	0	195	657	286	

BOM or Kit – Use as Default

Sage 300 Inventory Control has a "Use as Default" setting for BOMS and Kits, as shown here:



In Extended Order Entry, this setting causes the BOM number to be defaulted when the BOM item is added to an order.

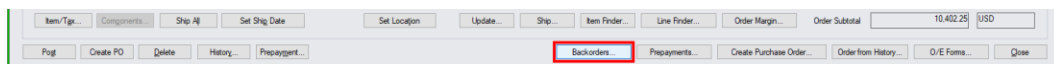
(By contrast, in Sage 300 Order Entry, this setting **does not** cause the BOM number to be defaulted.)

Backorders

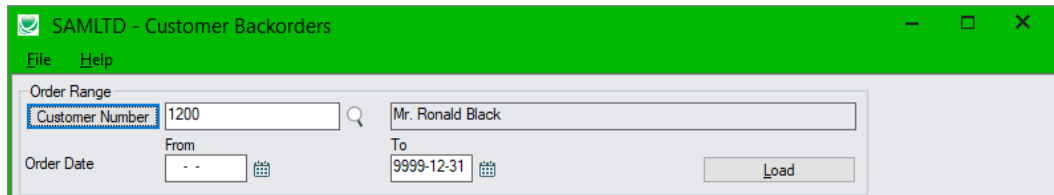
The Backorders feature lets you display all items on backorder for the current customer – while entering an order.

To display backordered items on multiple prior orders:

- Click the Backorders button at the bottom of the screen:



The Customer Backorders popup appears, and defaults to orders for the current customer number and a full range of order dates.

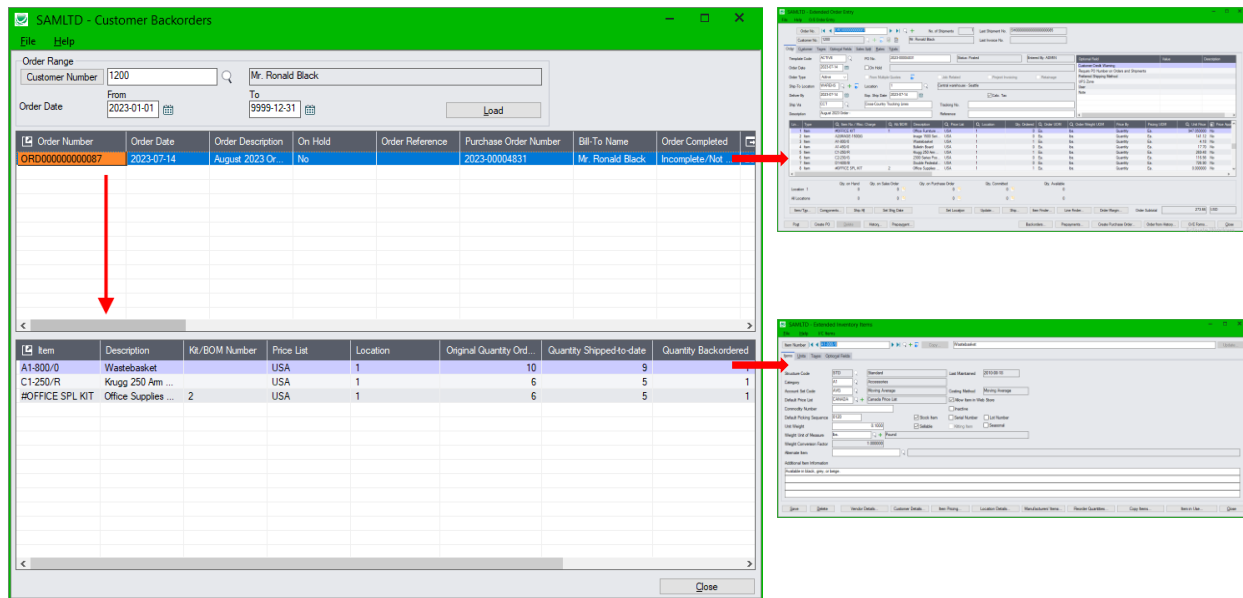


- Click the Load button to display all orders for the current customer with backordered items.

Or

- Click the Customer Number button to look up a different customer using the SmartFinder.
- Specify the range of order dates that you want to search.
- Click the Load button to display orders with backordered items.

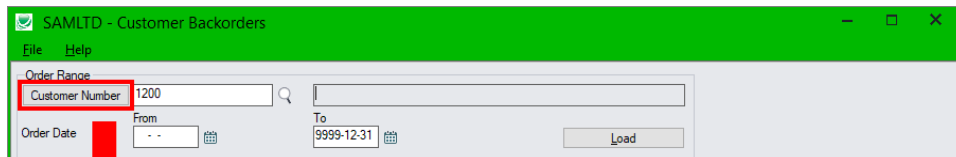
The program displays all orders with backordered items for the customer within the range of order dates.



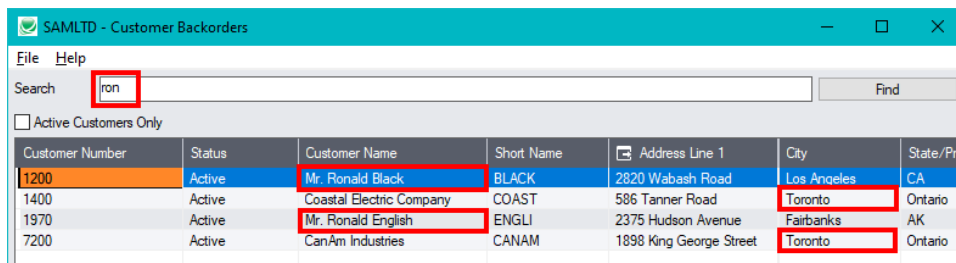
- Highlight an order in the top grid to view the backordered item details in the bottom grid.
- Double-click the order number – or click the Order Number column heading – to drill down to the order using the Extended Order Entry program.
- Double-click the item number in the bottom grid – or click the Item column heading – to drill down to the item details using the Extended Inventory Items program.

Using the SmartFinder to Look Up Customer Numbers:

- Click the Customer Number button to look up a different customer using the SmartFinder.



- Enter part of a name or address (or contact phone or email address) and click the Find button.



In this example:

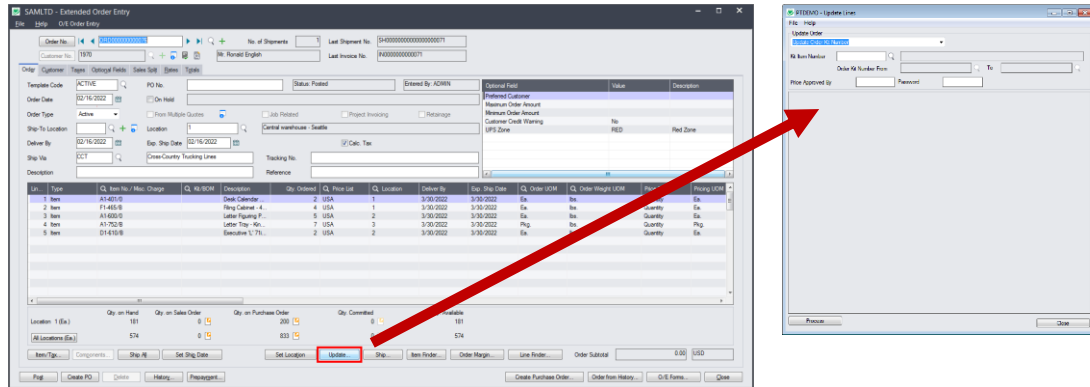
- We entered “ron” in the Search field and pressed the Enter key to search for Ronald Black.
- The program got 4 results, 2 with “**Ronald**” in the Customer Number field, and 2 with “**Toronto**” in the city field.

See [SmartFinder – Customers](#) for more information on using the customer SmartFinder.

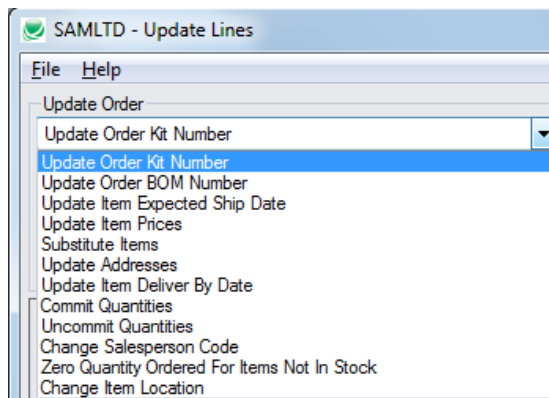
Update Order

The Update Order functionality lets you make multi-faceted changes to an order – affecting multiple detail lines and order quantities.

- Open the order that you want to change, then click the “Update...” button to display the Update Lines window for updating orders.



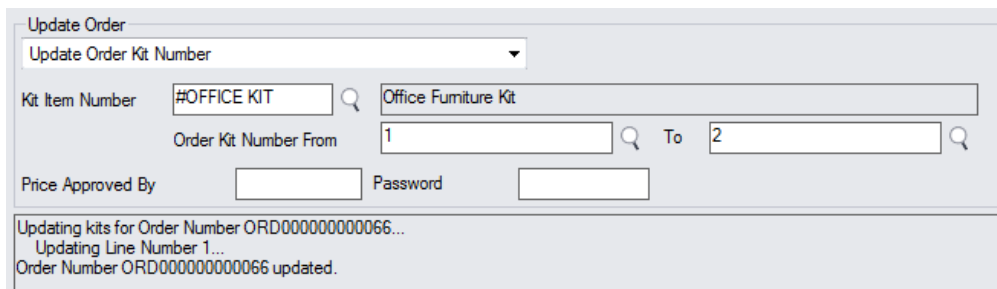
The Update Lines screen lets you select from twelve different update procedures:



Each choice has appropriate options.

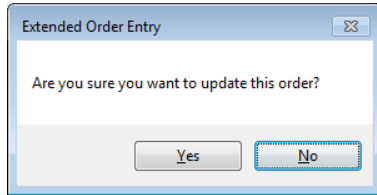
When you click the Process button, the program displays all changes in the window as it processes the order lines. It will also display a message if no changes are made.

Updating an Order Kit Number



- Select Update Order Kit Number from the dropdown list.
- Use the Finder to select the Kit Item Number.
- Select the current “From” kit number and the new “To” kit number.

- Click the Process button and select Yes when the confirmation message appears.



Depending on your permissions, you may need to have price changes for a different kit number approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

Note: To change kit details, Update Order deletes the kit detail line from the posted order and then adds a new kit line with the appropriate changes – because Sage 300 does not allow it to change the details on a posted kit line.

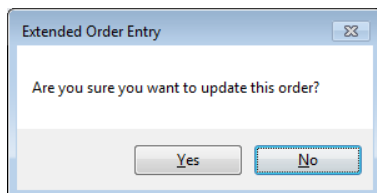
However, **if an order has been partially shipped**, the kit order lines cannot be deleted – this is also a restriction imposed by Sage 300 business logic – and the program will display an error message.

To change kit details on a partially shipped order:

1. Change the Qty. Ordered for the kit item line to 0.
2. Insert a new order line, and specify the new kit number.

Updating an Order BOM Number

- Select Update Order BOM Number from the dropdown list.
- Use the Finder to select the BOM Item Number.
- Select the current “From” BOM mnumber and the new “To” BOM number.
- Click the Process button and select Yes when the confirmation message appears.



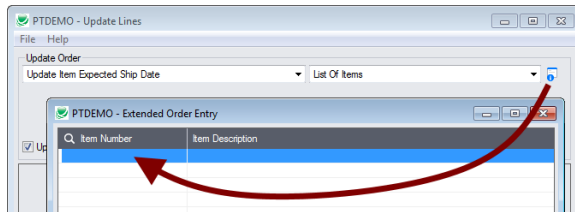
Depending on your permissions, you may need to have price changes for a different BOM number approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

Updating Item Expected Ship Date

- Select Update Item Expected Ship date from the dropdown list.
- Specify if this change is for a specific item, a range of items, or all items.

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.

See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Enter the new Expected Ship Date.
- Click the Update Order Expected Ship Date Also if this also changes the order date.
- Click the Process button and select Yes when the confirmation message appears.

The program will display progress messages as it updates lines and tell you when it is finished (as in the screen above).

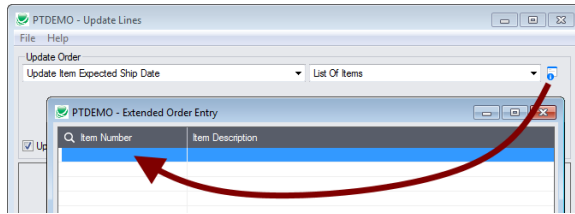
Updating Item Prices

- Select Update Item Prices from the dropdown list.

- Specify if this change is for a specific item, a range of items, or all items.

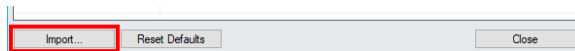
Specific Item
List Of Items
All Items

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



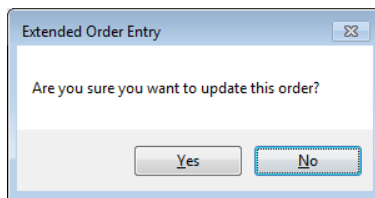
Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.



See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

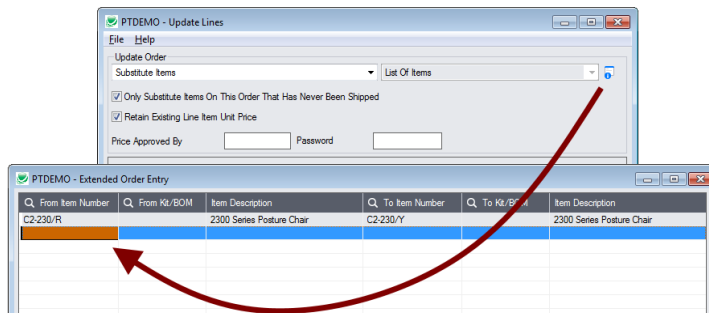
- Choose the price list that you are using for the updates.
- Click the Process button and select Yes when the confirmation message appears.



The program updates prices for the items you specified to the prices on the price list.

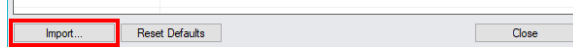
Substituting Items

- Select Substitute Items from the dropdown list.
- To specify the substitute items list, click the Zoom button beside the dropdown, and add “From” items (or kits/BOMs) and “To” items (or kits/BOMs) to the list in the form that appears.



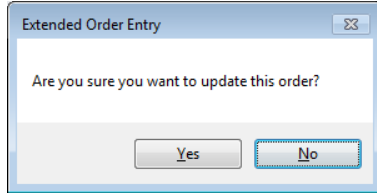
Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.



See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

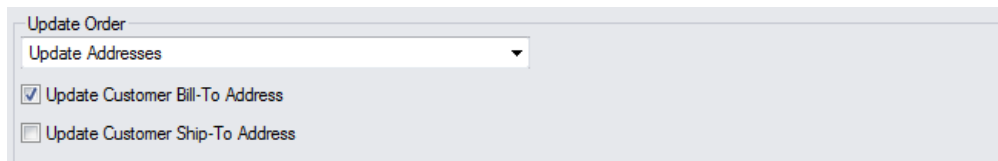
- Choose whether to “Only Substitute Items On This Order That Have Not Been Shipped.” If this option is selected, a line that is partially shipped will not be touched.
- Choose whether you want to “Retain Existing Line Item Unit Price.”
- Click the Process button and select Yes when the confirmation message appears.



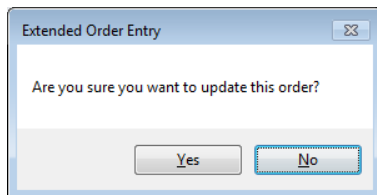
Depending on your permissions, you may need to have price changes for items approved by a supervisor.

The program will display progress messages as it updates lines and tell you when it is finished.

Updating Customer Addresses

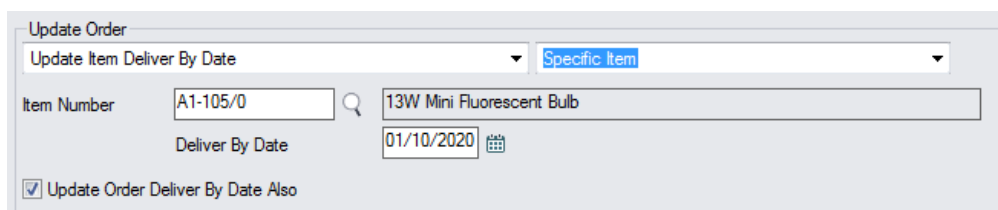


- Select Update Addresses from the dropdown list.
- Choose which addresses you want to update – customer bill-to address or ship-to address.
- Click the Process button and select Yes when the confirmation message appears.



The program updates the address from the customer record.

Updating the Item Deliver-By Date



- Select Update Update Deliver By Date from the dropdown list.

- Specify if this change is for a specific item, a range of items, or all items.

A dropdown menu with the following options: Specific Item, Specific Item, List Of Items, All Items. The first 'Specific Item' is highlighted in blue.

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.

The 'Update Order' dialog box is shown with the 'List Of Items' dropdown selected. A red arrow points from the 'List Of Items' dropdown to a pop-up window titled 'PTDEMO - Extended Order Entry'. This window contains a table with columns 'Item Number' and 'Item Description'.

Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.

The 'Update Order' dialog box is shown with the 'Import...' button highlighted by a red rectangle. Other buttons visible are 'Reset Defaults' and 'Close'.

See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Enter the new Deliver By Date.
- Click the Update Order Deliver By Date Also if this also changes the date for the order.
- Click the Process button and select Yes when the confirmation message appears.

A confirmation dialog box titled 'Extended Order Entry' with the text 'Are you sure you want to update this order?'. It has 'Yes' and 'No' buttons.

The program will display progress messages as it updates lines and tell you when it is finished.

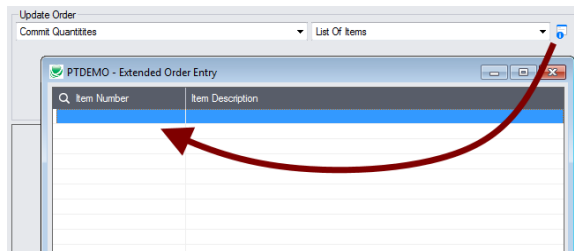
Committing Quantities

The 'Update Order' dialog box is shown with the 'Commit Quantities' dropdown selected. Below it, the 'Item Number' field contains 'A1-105/0' and the 'Item Description' field contains '13W Mini Fluorescent Bulb'.

- Specify if this change is for a specific item, a range of items, or all items.

A dropdown menu with the following options: Specific Item, Specific Item, List Of Items, All Items. The first 'Specific Item' is highlighted in blue.

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



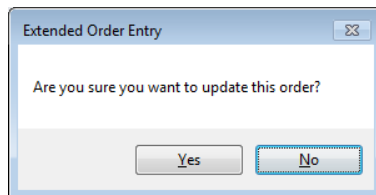
Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.



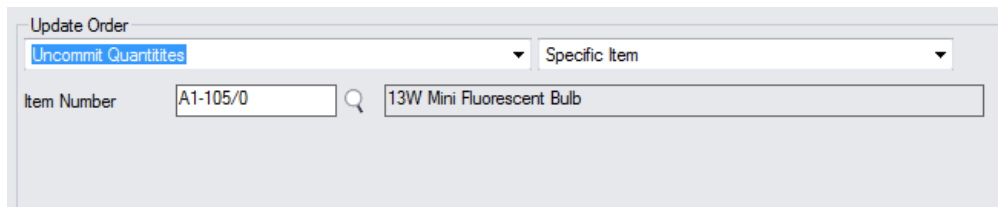
See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Click the Process button and select Yes when the confirmation message appears.

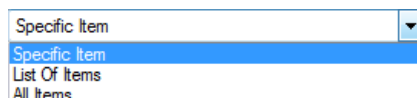


The program will display progress messages as it updates lines and tell you when it is finished.

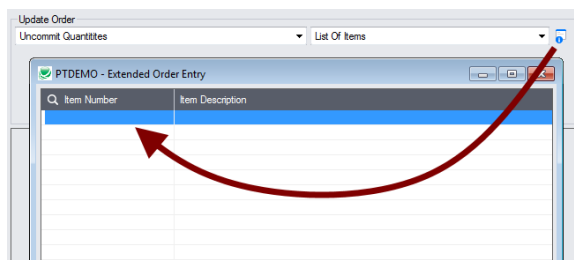
Uncommitting Quantities



- Specify if this change is for a specific item, a range of items, or all items.

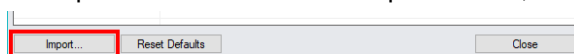


- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



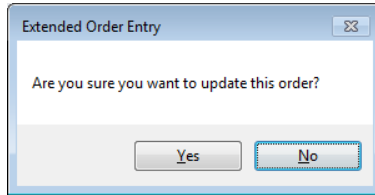
Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.



See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Click the Process button and select Yes when the confirmation message appears.

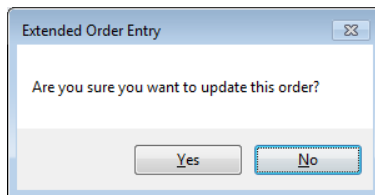


The program will display progress messages as it updates lines and tell you when it is finished.

Changing Salesperson Code

- Specify the From and To salesperson codes.

- Use the Finder to look up salespeople.
- Click the Process button at the bottom of the form and select Yes when the confirmation message appears.



The program will display the following messages when it performs the update.

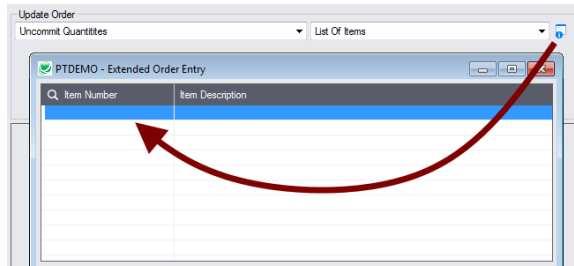
```
Updating salesperson codes for Order Number ORD000000000069...
Order Number ORD000000000069 updated.
```

Zeroing Quantity Ordered For Items Not In Stock

Note: This choice reduces quantities to zero on orders where the items have zero quantity on hand at the location specified on the detail line.

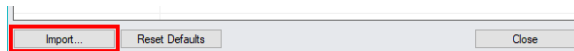
- Specify if this change is for a specific item, a range of items, or all items.

- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



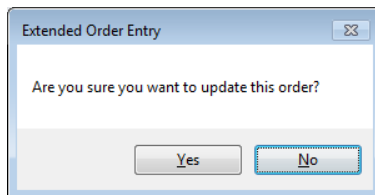
Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.



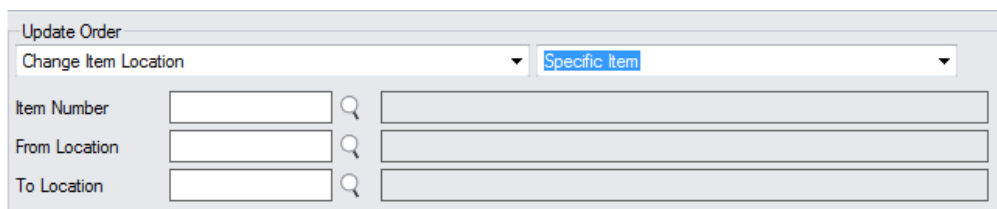
See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Click the Process button and select Yes when the confirmation message appears.



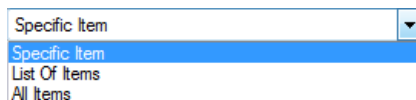
The program will display progress messages as it updates lines and tell you when it is finished.

Changing Item Location

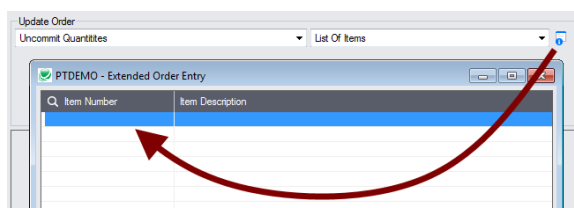


This choice lets you change the item location for fulfilling orders. Note that the location can only be changed on order lines where the quantity ordered is greater than 0, and the quantity committed or quantity shipped is 0.

- Specify if this change is for a specific item, a range of items, or all items.



- For a Specific Item, choose the Item from the Finder.
- For a List of Items, click the Zoom button beside the dropdown, and add items to the list in the pop-up form that appears.



Use the Finder to look up items. Use the Insert key to add new empty lines.

- To Import a list of items from a spreadsheet, click the Import button.

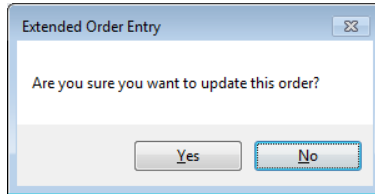


See [Details for importing a list of items or item substitutions](#) for spreadsheet format details.

- Specify the “From Location” that you want to replace, and the new “To Location”.

From Location	2	Portland Office
To Location	1	Central warehouse - Seattle

- Click the Process button and select Yes when the confirmation message appears.



The program selects orders with the specified From Location on item lines.

Details for importing a list of items or item substitutions

- Click the Import button at the bottom of the item list popup form and select the spreadsheet containing the item list. The imported list will replace the current list of items.
- Use the Insert key to add more rows to the list.
- Use the Delete key to remove items from the imported list.
- Click the Reset Defaults button to delete all items from the list.

Import format:

You can find sample import files in directory \Sage300\XL61A\Documentation.

Note: The Excel Spreadsheet for an item list (Items.xlsx) is a single column with “ITEMNO” as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

The Excel Spreadsheet for an item substitution list (ItemSubstitutes.xlsx) must have at least these four columns. The program will ignore any other column names.

	A	B	C	D
1	ITEMNOFROM	DTLNFROM	ITEMNOTO	DTLNOTO
2	C1220B		C1220T	
3	#OFFICE SPL KIT	1	#OFFICE SPL KIT	2

- Item numbers can be formatted or unformatted.
- All other columns are ignored. This means that you can add item descriptions and notes to your spreadsheet without affecting the file import.