

Extended PO Invoice Entry

Extended PO Invoice Entry is an enhanced replacement for the Sage P/O Invoice Entry form that lets you:

- Quickly receive an invoice from a vendor that references many receipts.
 - The Multiple Receipts zoom pop-up shows all receipts related to a vendor, so you can quickly match them to an invoice.
 - A vendor is related to a receipt if they are the primary vendor or an additional cost vendor.
- Drill down to more information while entering an invoice and fast access to additional Receipt, Vendor, and Item information.

The following pictures show some of the extra features on the Extended PO Invoice Entry screen:

Sage P/O Invoice Entry screen

Ln.	Fully Invoiced	Item Number	Item Description	Location	Quantity Invt.	Unit of Measure	Unit Cost
1	Yes	A1-105-0	13W Mini Fluorescent Bulb	2	75	Ea.	3.35000
2	Yes	A1-105-0	13W Mini Fluorescent Bulb	3	75	Ea.	3.35000
3	Yes	A1-105-0	13W Mini Fluorescent Bulb	4	100	Ea.	3.35000

TaiRox Extended PO Invoice Entry screen

Ln.	Fully Invoiced	Item Number	Item Description	Location	Quantity Invt.	Unit of Measure	Unit Cost
1	Yes	A1-105-0	13W Mini Fluorescent Bulb	2	75	Ea.	3.35000
2	Yes	A1-105-0	13W Mini Fluorescent Bulb	3	75	Ea.	3.35000
3	Yes	A1-105-0	13W Mini Fluorescent Bulb	4	100	Ea.	3.35000

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

[Multiple Receipts per Invoice](#) Quickly receive an invoice from a vendor that references many receipts.

[SmartFinder – Invoice Number](#) Finds invoices and shows invoice details quickly for any vendor.

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

[SmartFinder – Receipt Number](#) Find an item quickly from partial words.

SmartFinders provide fast, browser-like search capabilities to lookups on the PO Entry screen.

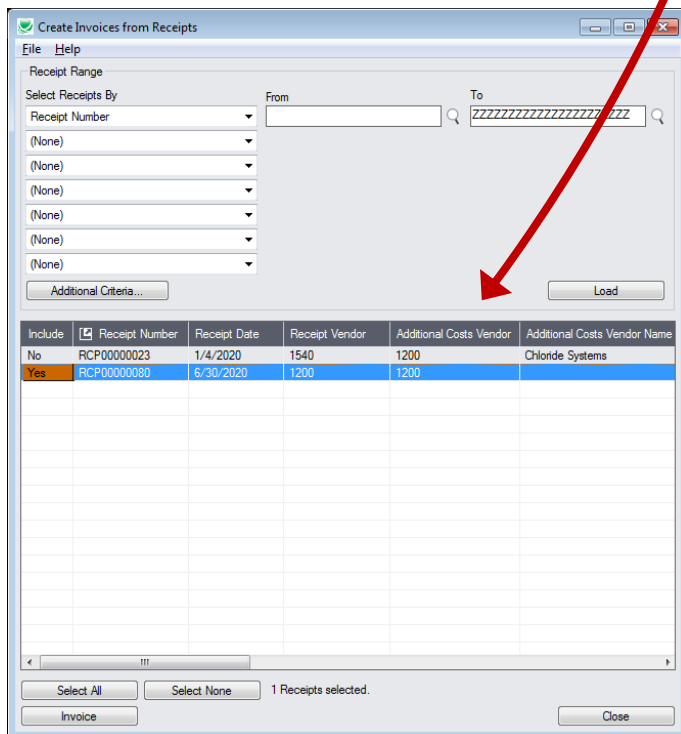
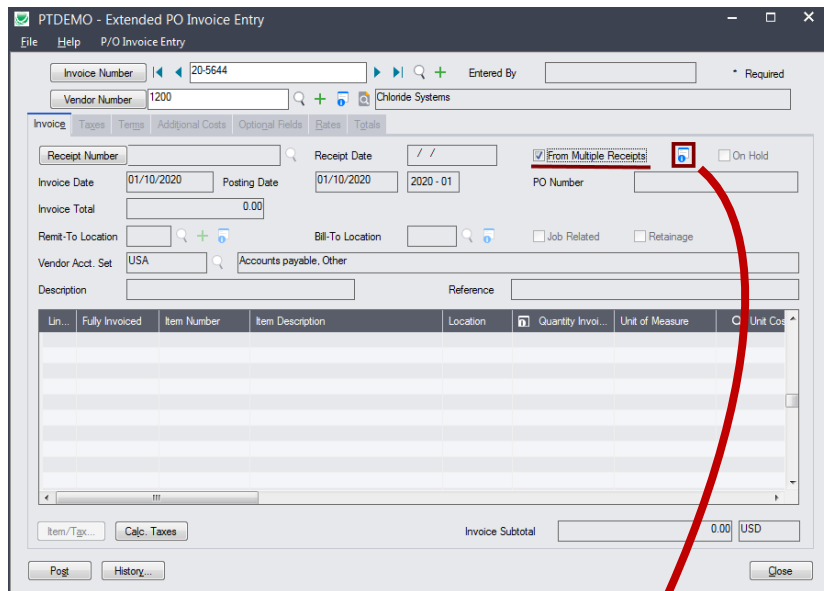
The SmartFinder searches more fields than the Finder and searches in all text fields at once.

For example, search for “Seattle” if you think that the vendor or contact is in Seattle.

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


Multiple Receipts per Invoice

- Select the From Multiple Receipts checkbox.
- Click the Zoom button (outlined below) to launch a window that replaces the Sage 300 Create Invoice from Receipts window.
- Choose a range of receipts and click the Load button – or just click the Load button to display all receipts.



- Double-click the Receipt number (or the click the column heading) to view the Receipt.

- Click the Select All and Select None buttons to include all or none of the receipts listed in the grid.
 - The vendor for the invoice may be either the primary vendor or an additional cost vendor. Both are shown.
- Double-click the Include column to select individual receipts (the Include column displays Yes).

Include	 Receipt Number	Receipt Date	Receipt Vendor	Additional Costs Vendor	Additional Costs Vendor Name
No	RCP00000023	1/4/2020	1540	1200	Chloride Systems
Yes	RCP00000080	6/30/2020	1200	1200	

Note: This example shows one receipt where vendor 1200 is an additional cost vendor.

- Click the Invoice button when you have selected the receipts that you want to invoice.
 - Pressing the Invoice button will include all selected receipts on the invoice.
 - Invoiced items will appear in the grid on Invoice tab.
 - Additional costs will appear on the Additional Costs tab.

SmartFinder – Invoices

Click the Invoice Number button to open the SmartFinder for searching invoices. Invoice Number

Search:

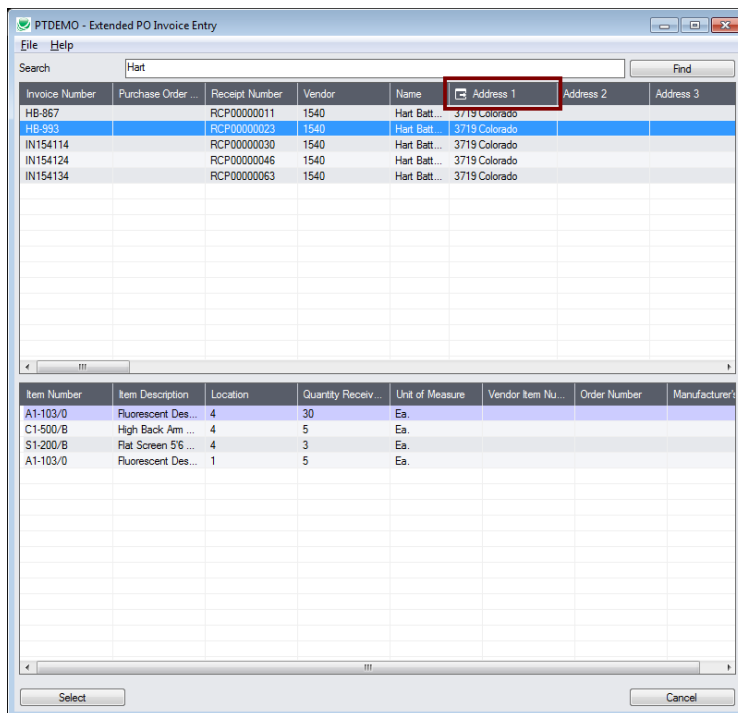
- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- Search returns records which contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may have it in the address field. Both will be displayed.

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 invoice where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

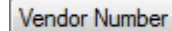
Display:

- The top grid displays the invoices matching the search criteria. Double-click to select an invoice.
- The bottom grid displays the details of the invoice highlighted in the top grid.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor address. You can also check the locations of Ship-To and Bill-To addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.



SmartFinder – Vendors

Click the Vendor Number button to open the SmartFinder for searching vendors.

A rectangular button with a thin border and the text "Vendor Number" inside.

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- You can also filter for Active vendors.
- Search returns vendors and remit-to location records which contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may have it in the address field. Both records will be displayed.

Note:

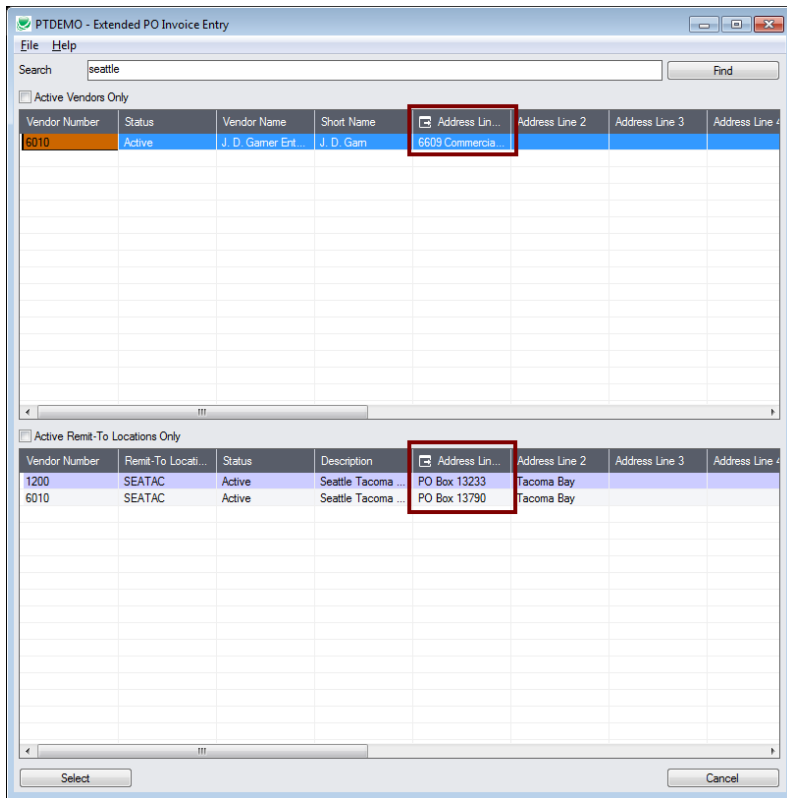
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for “Ross Blvd”, you will not see a vendor where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the vendors matching the search criteria.
- The bottom grid displays the remit-to locations that match the search criteria.

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

- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor address. You can also check the locations of Ship-To and Bill-To addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.



Selection:

- Double-click a vendor in the top grid to select and enter the vendor on the invoice.
- Double-click a remit-to location in the bottom grid to add the vendor and this remit-to address to the invoice.

SmartFinder – Receipts

Click the Receipt Number button to open the SmartFinder for Receipts. Receipt Number

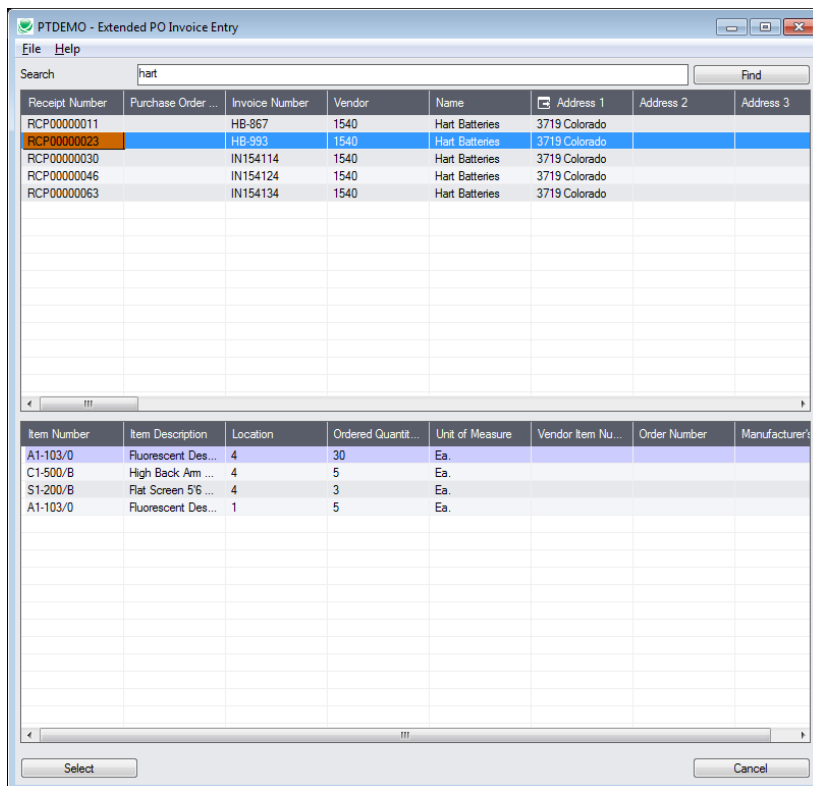
- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- Search returns records which contain the search string in any of the searched fields.

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 invoice where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the receipts matching the search criteria. Double-click to select a receipt.
- The bottom grid displays the item details of the receipt highlighted in the top grid.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor address. You can also check the locations of Ship-To and Bill-To addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.



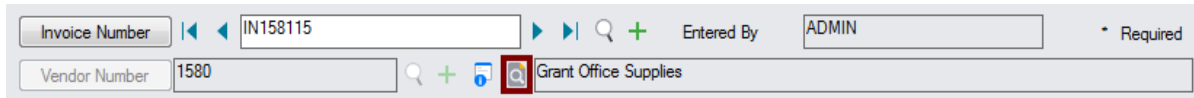
Selection:

- Double-click a receipt in the top grid to select the receipt and enter the receipt details on the invoice.

Vendor Inquiry

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

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



PTDEMO - Vendor Inquiry

Vendor No. 1580 Grant Office Supplies

Pending
 Requisitions
 POs
 PO Receipts
 PO Invoices
 PO Returns
 PO CR/DR
 Purchases
 Aging
 Items

Profile
 Address
 Comments
 Optional Pds.
 Remit-To
 Recur. Payables
 Activity
 Documents
 Payments
 Adjustments

Short Name: GRANT Start Date: 05/09/1995
 Legal Name: Last Maintained: 08/18/2010
 Group Code: INV Inventory Purchases Active
 Account Set: USA Accounts payable, Other On Hold
 Rate Type: SP
 Bank Code: SEATAC Seattle Tacoma Bank
 Payment Code: CHECKUSD USD check Seattle Tacoma Bank
 Check Language:
 Delivery Method: Mail
 Terms: DUETBL Due by Invoice Date
 Retainage Terms:
 Retainage %: 0.00000
 Retention Period: 0
 Tax Group: CALIF California State Tax Group

Tax Authority	Authority Descri...	Tax Class	Class Description	Registration Number	Tax Included
STATE	State Tax	1	Taxable item		No
COUNTY	County Tax	1	Taxable merchandise		No

Vendor Account Status
 Outstanding Balance: 1,123,641.50 No. of Open Invoices: 6
 Prepayment Amount: 0.00 No. of Prepayments: 0
 Outstanding Retainage: 0.00
 Credit Limit: 1,000.00

Refresh Close