

Extended Ship-Via Codes

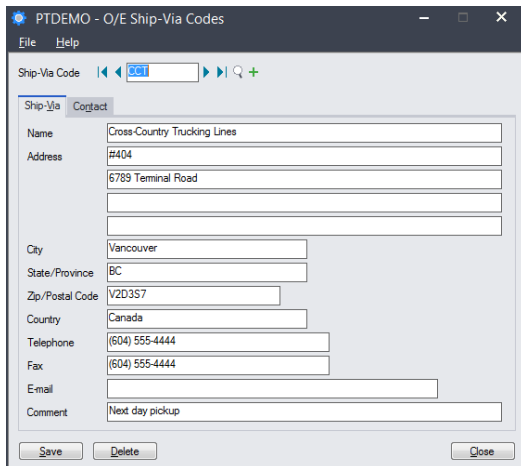
Extended Ship-Via Codes is an enhanced replacement for the Sage O/E Ship-Via Codes screen. It provides you with more functionality for adding and maintaining new ship-via codes, and fast address confirmations and emailing to ship-via addresses and contacts.

Extended Ship-Via Codes lets you:

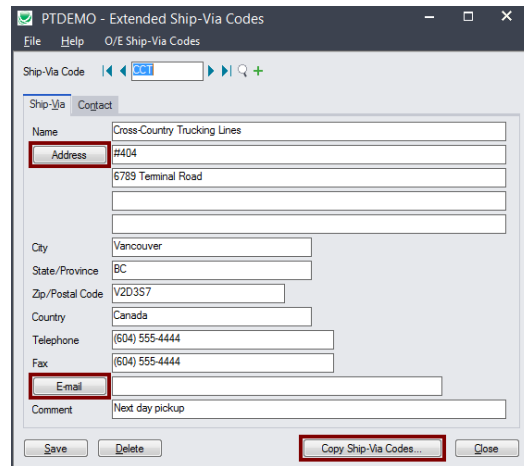
- Maintain ship-via codes for orders across multiple Sage 300 companies using the Copy Ship-Via Codes functionality.
 - Specify a range of codes from the current company, filter them by additional criteria, cherry-pick codes from the results, and then copy the final set to other associated Sage 300 companies.
 - Select or de-select companies on an individual basis.
 - Display a full log of changed codes.
- Display Ship-Via address locations in Google maps.
- Create new emails for the Ship-Via and Contact email addresses.
- Add a Tracking URL on the Contact tab that's used by the Email Packing Slips program for checking shipping progress on emailed packing slips. (See the Email Packing Slips User Guide.)

The following screens show some extra features provided by the Extended Ship-Via Codes screen.

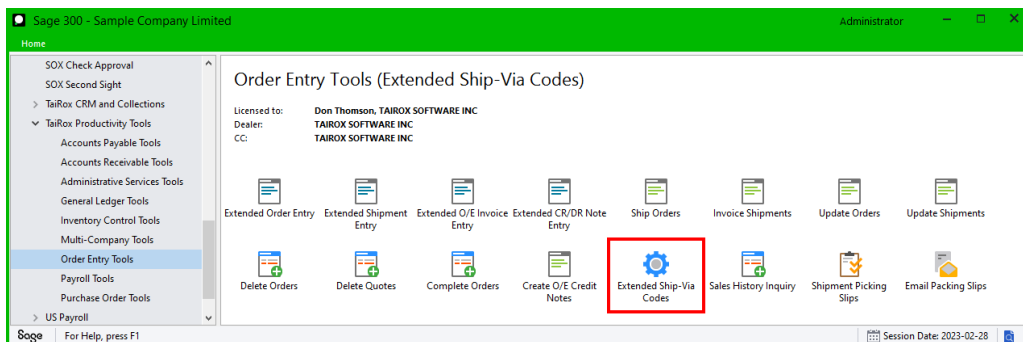
Sage O/E Ship-Via screen



TaiRox Extended Ship-Via Codes screen



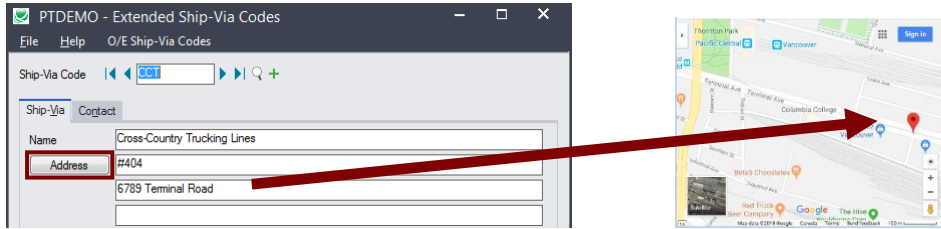
The Extended Ship-Via Codes icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



Using Extended Ship-Via Codes

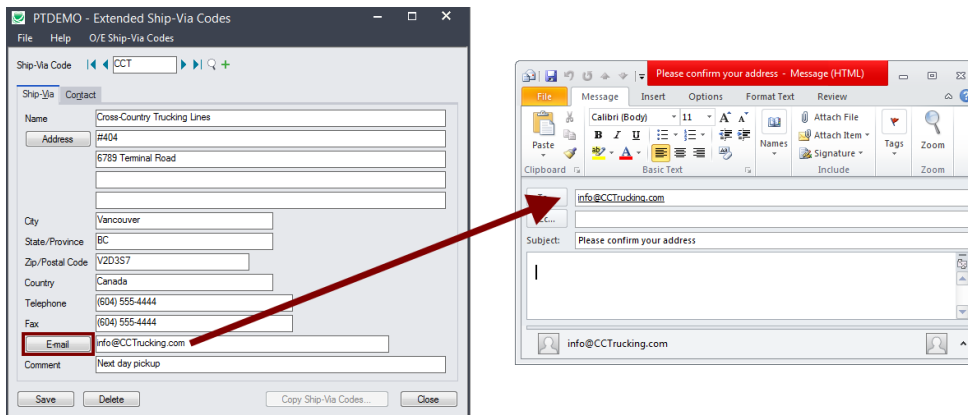
Look up addresses in Google maps

- Click the address button on the Extended Ship-Via Codes screen to confirm locations.



Launch emails for ship-via and contact email addresses

- Click the Email button on the Ship-Via or Contact tabs to quickly create a new email.



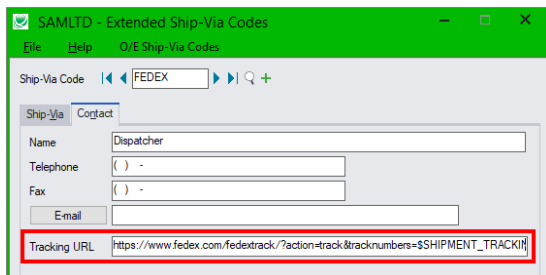
Add the Shipment Tracking URL for Looking up the Status of Shipments

The Extended Ship-Via Codes program lets you include a link on the Contacts tab to the shipper's website URL for tracking shipments. This URL is used by the Email Packing Slips program to create a link that customers can click to track the status of shipments.

To correctly pass the tracking number from the shipment to the website, the URL must include **\$\$SHIPMENT_TRACKING** – the shipment tracking number substitution variable – in place of the actual tracking number.

For example, the English language tracking URL for Federal Express is as follows. Note that “\$\$SHIPMENT_TRACKING” will be replaced by the tracking number entered in O/E for the shipment.

[https://www.fedex.com/fedextrack/?action=track&tracknumbers=\\$\\$SHIPMENT_TRACKING&locale=en_CA&cntry_code=us](https://www.fedex.com/fedextrack/?action=track&tracknumbers=$$SHIPMENT_TRACKING&locale=en_CA&cntry_code=us)



Copy Ship-Via Codes to other Sage 300 companies

IMPORTANT:

You must enter a User ID and Password to copy codes. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new codes in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the ship-via codes that you want to copy.
 - Copy Ship-Via Codes operates from within an existing "source" company, and lets you copy ship-via information to other Sage 300 company databases.
- Open the Extended Ship-Via Codes form, and click the Copy Ship-Via button at the bottom of the screen.

The screenshot shows a form with several input fields and buttons. At the bottom, the 'Copy Ship-Via Codes...' button is highlighted with a red rectangular box. Other buttons include 'E-mail', 'Add', 'Delete', and 'Close'.

When the Copy Ship-Via Codes button is pressed, a window will pop up for selecting the ship-via codes in the source company.

The screenshot shows a dialog box titled 'PTDEMO - Extended Ship-Via Codes'. It has a menu bar with 'File' and 'Help'. Below the menu bar, there are fields for 'Ship-Via Code Range', 'Select Ship-Via Codes By', 'Code', 'From', and 'To'. The 'To' field contains 'ZZZZZZ'. There is an 'Additional Criteria...' button and a 'Load' button. Below these fields is a large grid with columns for 'Include', 'Code', and 'Name'. At the bottom of the grid, there are buttons for 'Select All', 'Select None', 'Copy...', and 'Log...'. A 'Close' button is located at the bottom right of the dialog box.

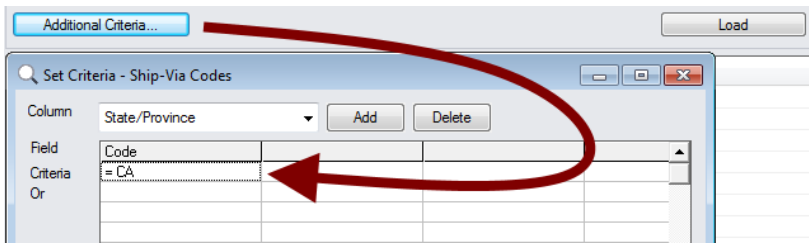
Note: By default, the grid at the bottom of the form will display any new ship-via codes that were added in this session. This allows you to bypass the selection process and copy these new codes directly to other Sage company databases.

Specify a range of ship-via codes for copying:

The screenshot shows a dialog box titled 'Ship-Via Code Range'. It has a 'Select Ship-Via Codes By' dropdown menu with 'Code' selected. To the right of the dropdown are 'From' and 'To' text boxes. The 'To' box contains 'ZZZZZZ'.

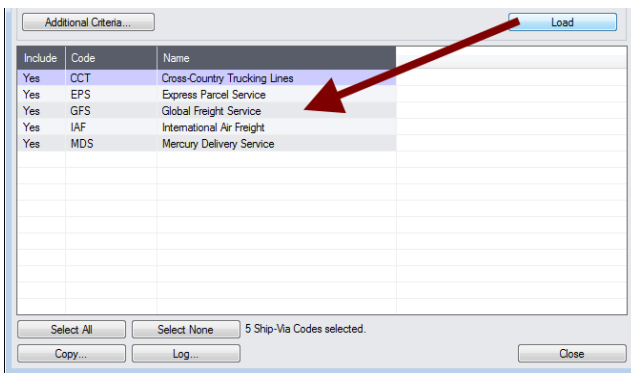
- You can specify a range of ship-via codes or select from all codes.

Choose additional criteria:



- Click the Additional Criteria button to further restrict the codes for copying. Click OK to save.

Load the list of ship-via codes and choose which ones to copy:



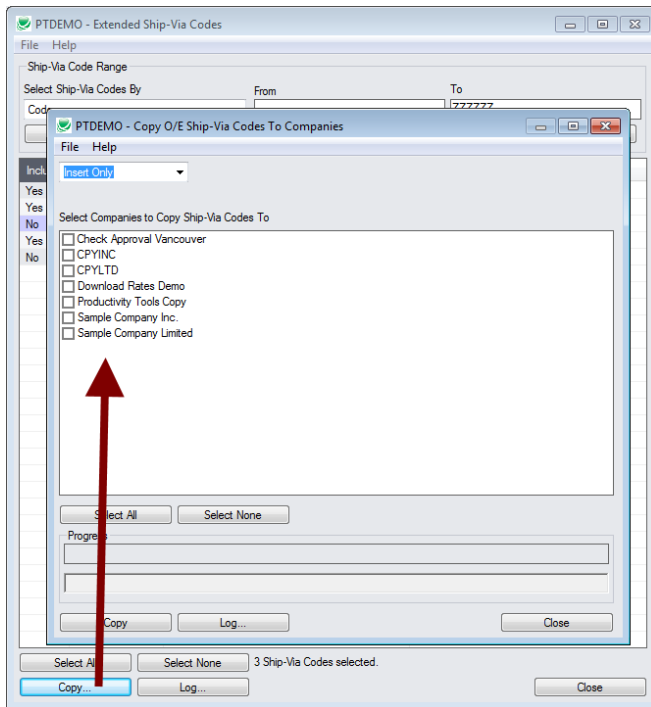
- Click the Load button to display the list of ship-via codes.
 When the Load button is pressed, the program will display the ship-via codes in the range and with the additional criteria you specified.
 - You can adjust the range or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the codes loaded in the grid.



- Double-click in the Include column to “cherry-pick” ship-via codes:

Include	Code	Name
Yes	CCT	Cross-Country Trucking Lines
Yes	EPS	Express Parcel Service
No	GFS	Global Freight Service
Yes	IAF	International Air Freight
No	MDS	Mercury Delivery Service

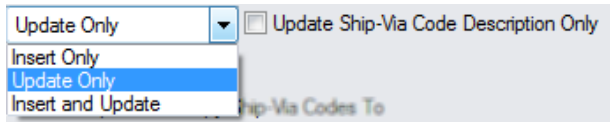
Click the Copy button to display the To Companies screen:



Select whether to insert new codes or update existing ones in target companies:

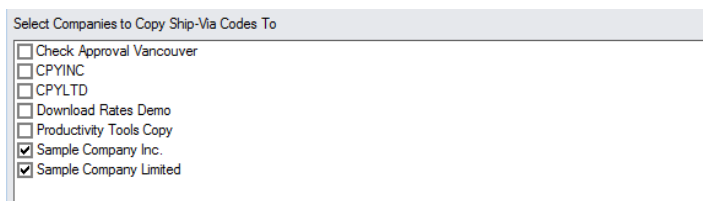
Before proceeding, you must decide whether to add or update codes in the target companies.

For example, choose Update Only to update address and contact information for all codes.



- Choose whether to insert, insert and update, or just update ship-via codes.
 - Insert Only will only add codes if the code does not already exist.
 - Update Only will only update codes that do exist.
 - Insert and Update will perform both of these operations.
- If updating codes only, you can choose to update the description only.

Select target Sage companies:

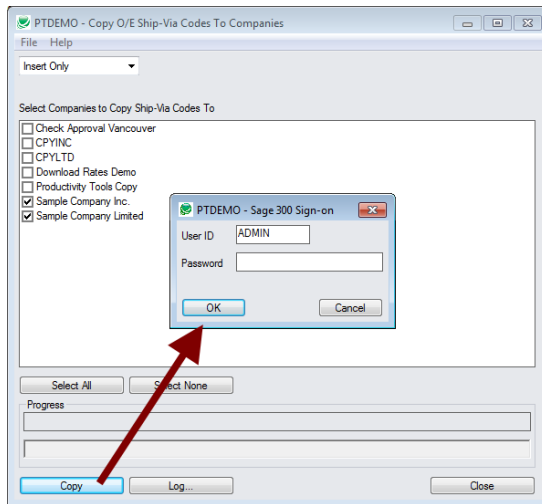


- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy ship-via codes:



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

Note: You MUST have sufficient permissions to update ship-via codes in the target companies for copying to proceed.
- The program will copy the ship-via codes to the target companies.
- If no changes are required for a selected code, there is no update performed - so the audit stamp is preserved.

Click the Log button to confirm which ship-via codes were processed:

```

7/17/2020 11:37:55 AM Copy O/E Ship-Via Codes To Companies started.
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM Performed by user: ADMIN
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM Update Only
7/17/2020 11:37:55 AM Update Ship-Via Code Description Only: No
7/17/2020 11:37:55 AM Copy Ship-Via Codes to Companies: Sample Company Inc.
7/17/2020 11:37:55 AM                                     Sample Company Limited
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM Copying ship-via codes from Productivity Tools Demo to Sample Company
7/17/2020 11:37:55 AM Inc. started.
7/17/2020 11:37:55 AM      Logging in to Sample Company Inc....
7/17/2020 11:37:55 AM      Updating ship-via code CCT...
7/17/2020 11:37:55 AM          Ship-Via code updated.
7/17/2020 11:37:55 AM      Updating ship-via code EPS...
7/17/2020 11:37:55 AM          Ship-Via code updated.
7/17/2020 11:37:55 AM      Updating ship-via code IAF...
7/17/2020 11:37:55 AM          Ship-Via code updated.
7/17/2020 11:37:55 AM      Logging off of Sample Company Inc....
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM      There was 3 ship-via codes updated.
7/17/2020 11:37:55 AM Copying ship-via codes from Productivity Tools Demo to Sample Company
7/17/2020 11:37:55 AM Inc. complete.
7/17/2020 11:37:55 AM Copying ship-via codes from Productivity Tools Demo to Sample Company
7/17/2020 11:37:55 AM Limited started.
7/17/2020 11:37:55 AM      Logging in to Sample Company Limited...
7/17/2020 11:37:55 AM      Updating ship-via code CCT...
7/17/2020 11:37:55 AM          Ship-Via code updated.
7/17/2020 11:37:55 AM      Updating ship-via code EPS...

```

```
7/17/2020 11:37:55 AM          No update required.
7/17/2020 11:37:55 AM      Updating ship-via code IAF...
7/17/2020 11:37:55 AM          No update required.
7/17/2020 11:37:55 AM      Logging off of Sample Company Limited...
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM          There was 1 ship-via code updated.
7/17/2020 11:37:55 AM          There was 2 ship-via codes not updated.
7/17/2020 11:37:55 AM Copying ship-via codes from Productivity Tools Demo to Sample Company
Limited complete.
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM
7/17/2020 11:37:55 AM Copy O/E Ship-Via Codes To Companies complete.
7/17/2020 11:37:55 AM
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```

The Log lists:

- The user, the type of operation performed, and the range of codes.
- Each ship-via code that was processed and whether the codes were updated.