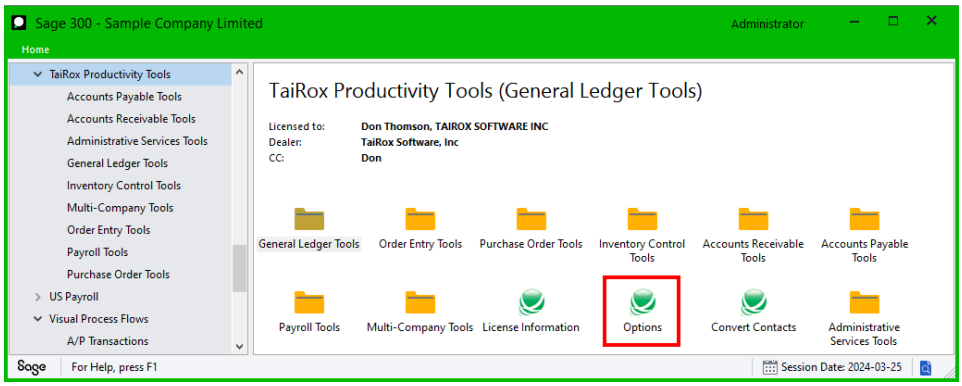
Productivity Tools Options

TaiRox Productivity Tools Options lets you hide productivity tools that are not used by your company and set a wide variety of options for entering orders, shipments, purchase orders, and PO receipts.

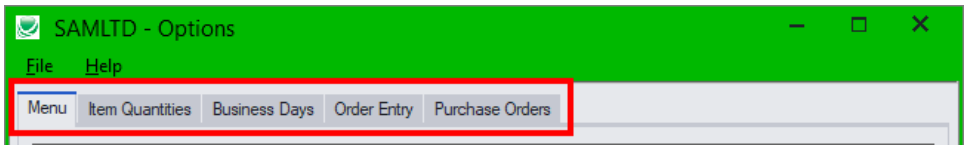
Important Notes: The Options program is only available to the Sage 300 ADMIN user. Changes are site-wide, meaning that they apply to all Sage 300 companies, even though the edits are done while logged into a single company's desktop.

Setting Productivity Tools Options

Choose the Options program from the top-level of the Productivity Tools menu:



The Productivity Tools Option screen has five tabs:



- **Menu tab:** Lets you hide productivity tools that are not used by your company.
- **Item Quantities tab:** Lets you choose which locations and Sage 300 companies are included when you view item quantities in Extended PO Entry, Extended PO Receipt Entry, Extended Order Entry, and Extended Shipment Entry.
- **Business Days tab:** Lets you specify your company's regular business days and additional non-business days – such as statutory holidays and closures for inventory counts.

  Productivity Tools uses the regular business days and non-business days to calculate Order Entry's expected ship date and deliver by date in the Extended Order Entry program. You set the number of business days for the ship date and deliver by date on the Order Entry tab.
- **Order Entry tab:** Lets you display customer optional fields on the Order Entry and Shipment Entry screens, require orders and shipments to include a purchase order number, warn for customer PO numbers that were used on previous orders or shipments, show totals for a selected unit of measure, include line discounts in margin and markup calculations, require a valid ship-to location code, prevent users from changing the ship-to address on orders and shipments, calculate Order Entry's deliver by date and expected ship date, and default the quantity committed to the quantity ordered in Extended Order Entry for select customers.

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- **Purchase Orders tab:** Lets you display vendor optional fields on the PO Entry and Receipt Entry screens and require receipts to include a purchase order number. It also lets you link PO lines created from an order to the original order lines – for use with reports or program additions – and show totals for a selected unit of measure.

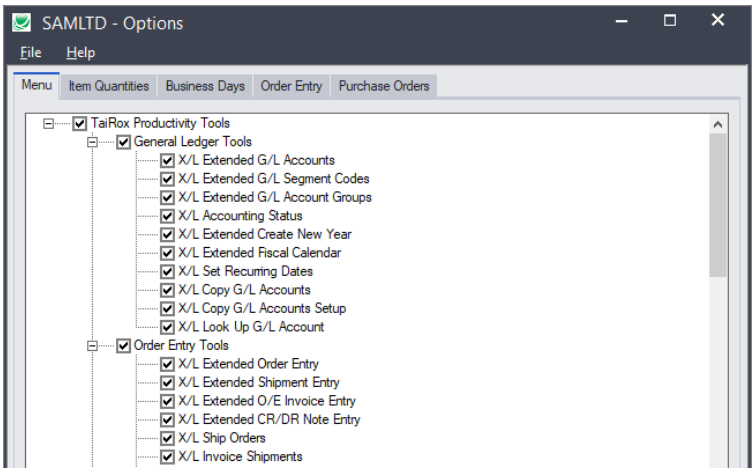
Menu tab – select which Productivity Tools appear on the Sage 300 Desktop

A Productivity Tools activation code (all modules) provides access to dozens of tools.

Although single module activations are available for TaiRox Productivity Tools, the Options program provides a quick way to hide tools that are not used by individual clients.

- It allows customers to hide tools they are not using.
- It allows resellers to demonstrate limited or full functionality quickly, without changing activations.

The Menu tab shows all TaiRox Productivity Tools – irrespective of the activation code in use.

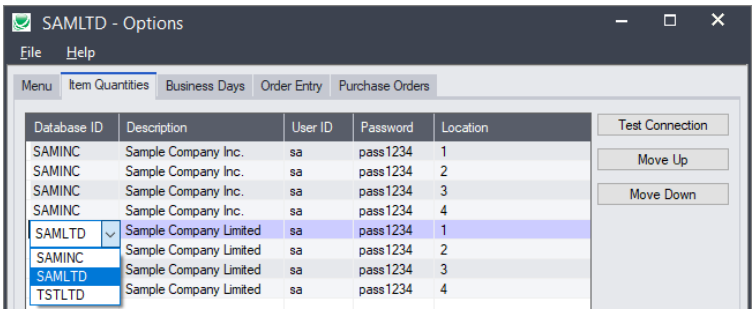


- **To hide tools**, deselect tools that you want to remove from the Sage Desktop.

Item Quantities tab – select companies and locations for Item Quantities display

Productivity Tools lets you display item quantities from multiple locations while entering orders, shipments, POs, and PO receipts. The multiple locations can be in the any Sage 300 Company.

- In Options, click the Item Quantities tab to specify companies and locations to be displayed.



- 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 that access to the data is through SQL Server, so you must provide database credentials. **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.

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To display Item Quantities for Extended PO Entry and Extended Order Entry

- Select the **Extended Order Entry > File > Settings** menu choice to change the Item Quantities display settings for sales orders.
- Select the **Extended Shipment Entry > File > Settings** menu choice to change the Item Quantities display settings for OE shipments.
- Select the **Extended PO Entry > File > Settings** menu choice to change the Item Quantities display settings for purchase orders.
- Select the **Extended PO Receipt Entry > File > Settings** menu choice to change the Item Quantities display settings for purchase order receipts.

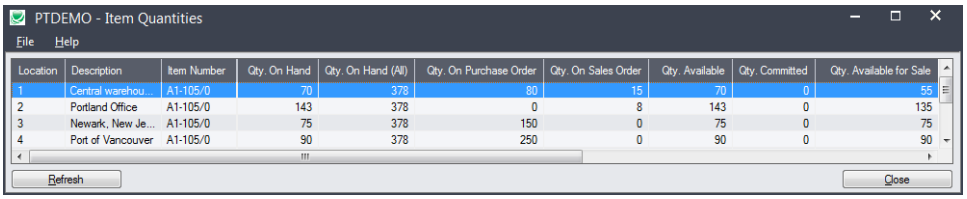
To customize the item quantities grid to suit user needs

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 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.

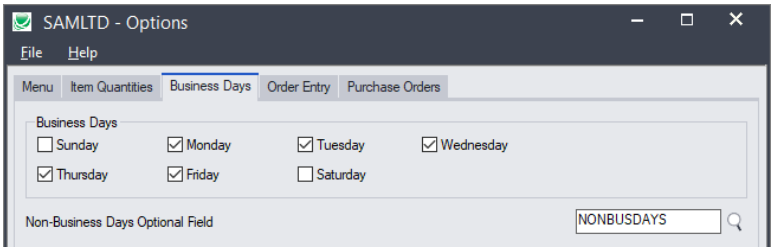
  You could also hide the item number column.



Location	Description	Item Number	Qty. On Hand	Qty. On Hand (All)	Qty. On Purchase Order	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale
1	Central warehou...	A1-105/0	70	378	80	15	70	0	55
2	Portland Office	A1-105/0	143	378	0	8	143	0	135
3	Newark, New Je...	A1-105/0	75	378	150	0	75	0	75
4	Port of Vancouver	A1-105/0	90	378	250	0	90	0	90

Business Days tab – specify your company's regular business days and additional non-business days

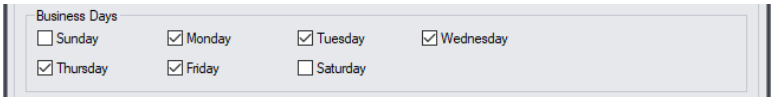
TaiRox Productivity Tools uses the regular business days and non-business days to calculate Order Entry's deliver by date and expected ship date on the order screen in Extended Order Entry – and to calculate the expected ship date on the Extended Shipment Entry screen.



You must also specify the number of business days after the order date to set the expected shipment date and the deliver by date. You do this on the Order Entry tab on the Options form.

To specify your company's business days

- Select the normal business days of the week for your company.



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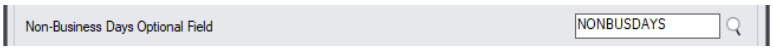
The business days, along with days added to the non-business days optional field, are used to calculate the shipment date and deliver by date in Extended Order Entry and the shipment date in Extended Shipment Entry.

You must also set the number of days after the order date for the shipment date and deliver by date on the Order Entry tab of the Options form.

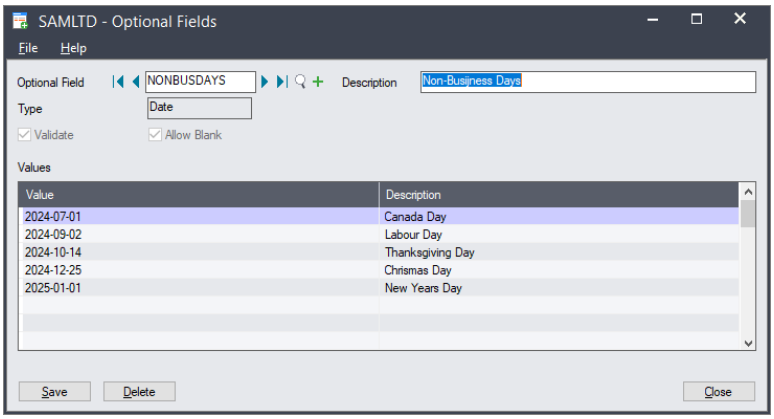
Select the Non-Business Days optional field for your company

- Select the optional field for listing non-business days for your company.

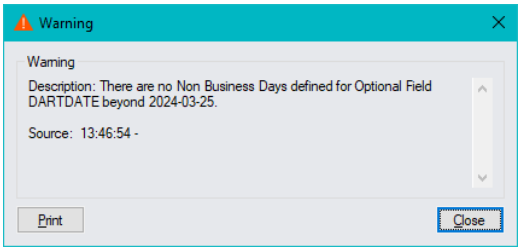


Non-business days could include statutory holidays and any other days that your company is closed – such as for quarterly stock taking. If the Optional Field is blank, the program will only use the Business Days.

The non-business days optional field must by of type “date” – like the following example:



Note: The Extended Order Entry program will display warning messages on startup for a number of possible error conditions. For example, the program will display the following message if the non-business days optional field does not contain any future non-business days.



Messages will warn you for the following conditions:

- The Optional Field xxx used to define Non-Business Days does not exist in TaiRox Productivity Tools Options.
- The Optional Field xxx used to define Non-Business Days in TaiRox Productivity Tools Options is not a Date Type field.
- There are no Non-Business Days defined for Optional Field xxx beyond <today’s date>.
- There are no Business Days set in TaiRox Productivity Tools Options.
- You must set at least one Business Day.

Order Entry tab – require POs on orders and shipments, warn for duplicate PO numbers on orders and shipments, show UOM totals, include discount % in margin/markup, enforce ship-to location codes, prevent changes to ship-to addresses, calculate expected shipment date and deliver by date, display

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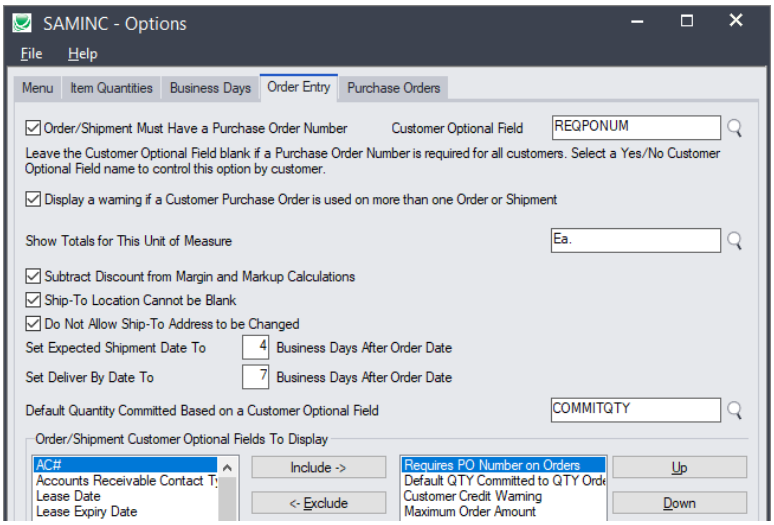
customer optional fields, and default the quantity committed to the quantity ordered in Extended Order Entry for select customers

The options on the Order Entry tab let you:

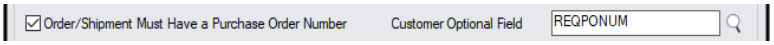
- Require orders and shipments to include purchase order numbers.
- Warn if a PO is duplicated on an order or shipment.
- Show unit of measure totals on the Extended Order Entry and Extended Shipment Entry screens.
- Include the discount percent set on order lines the margin/markup calculations for each line and for the order as a whole.
- Prevent orders and one-time shipments (shipments without an order) from being posted if the Ship-To Location is blank.
- Prevent users from entering or changing ship-to addresses.
- Calculate the expected ship date and deliver by date in Extended Order Entry and the expected ship date in Extended Shipment Entry.
- Default the quantity committed to the quantity ordered in Extended Order Entry for select customers.
- Display customer optional fields on Extended Order Entry and Extended Shipment Entry screens.

  Note that Sage 300 optional fields are sold and installed as a separate module. You must install optional fields, set them up in Common Services, add them to customers in Accounts Receivable, and then select them in Productivity Tools Options to add them to the Extended Order Entry and Extended Shipment Entry screens.



To force orders and shipments in Order Entry to include a purchase order number

- Select the checkbox for “Order/Shipment Must Have a Purchase Order Number.”



- Optionally, select a Yes/No customer optional field to specify which customers require purchase orders numbers on all orders and shipments.

  In this example, the customer optional field is called “REQPONUM – Order Requires PO Number.” The field must be a “Yes/No” type field.

  If you select the checkbox – ***and do not specify a customer optional field*** – the program will require a purchase order number on all orders and shipments.

Note: If you specify a Yes/No optional field -- and a customer record does not include the optional field – the program will ***not*** require a purchase order number when you create an order or shipment.

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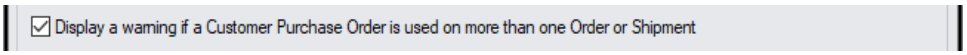
To warn users that a PO number has been used on a previous order or shipment

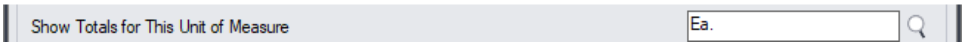
- Select the checkbox for “Display a warning if a Customer Purchase Order is used on more than one Order or Shipment.”



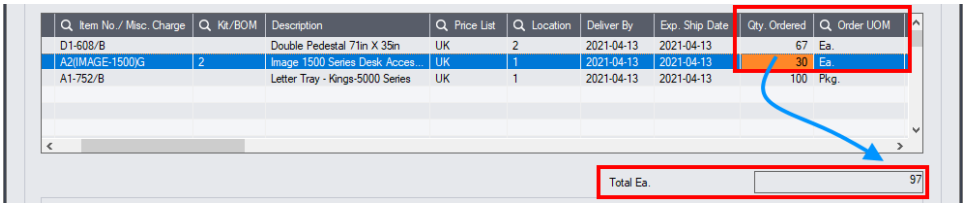
The program will warn users during Order Entry or Shipment Entry (where no order was entered) if a customer purchase order has been used on a previous order or standalone shipment.

To show totals for a particular unit of measure on Extended Order Entry and Extended Shipment Entry screens

- Select the unit of measure that you want to total. You can set the field to blank to turn off the option.



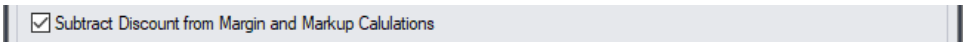
The unit of measure will be totalled on the Extended Order Entry screen.



Note that the total includes “Ea” unit of measure only. The “Pkg” unit is not included.

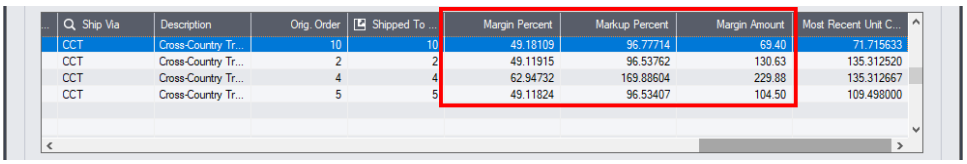
To include the discount set on order lines in margin/markup calculations

- Select the option to “Subtract Discount from Margin and Markup Calculations”.

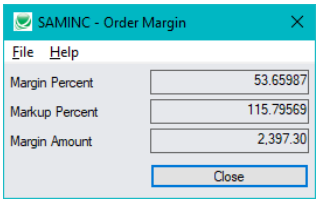


This option subtracts any line discount from the margin and markup calculations in Extended Order Entry, Extended Shipment Entry, and Extend O/E Invoice Entry.

The margin and markup columns appear in the grid for each order, shipment, and invoice line.

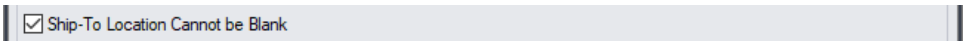


If you click the Order Margin, Shipment Margin button or Invoice Margin button, the program will include the discounts from each line in the margin and markup calculations.



To prevent users from posting orders or shipments with blank ship-to locations

- Select the option to “Ship-To Location Cannot be Blank”.



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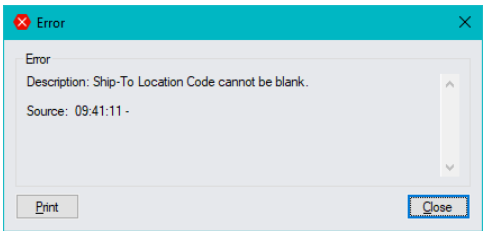
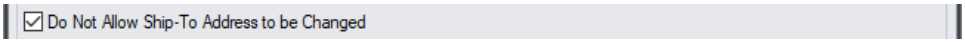
The program will display the following message if users try to post an order or shipment without a ship-to location code.

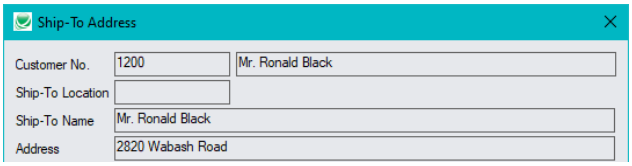


To prevent users from entering or changing ship-to addresses

- Select the option to “Do Not Allow Ship-To Address to be Changed”.

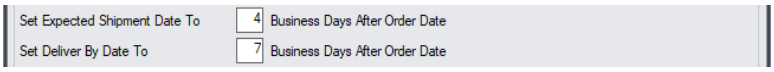


The program pop-up for ship-to addresses (shown below) will display the current address but not allow changes:



To calculate Order Entry’s expected ship date and deliver by date

- Enter the number of business days following the order date for goods to be shipped and delivered.



- Enter “0” to disable the options.

Order Entry uses the Business Days and the dates in the Non-Business Days optional field (specified on the Business Days tab) to calculate the expected ship date and deliver by date in Extended Order Entry, and the expected ship date in Extended Shipment Entry.

For example, if your company:

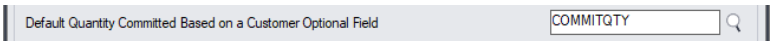
- Has a 5-day work week.
- And Monday is a holiday in the non-business days optional field.
- And orders are expected to ship 4 business days after the order date.

An order entered on Friday will display an expected ship date for the following Friday.

You can override the shipment date and the deliver by date for the order header and for individual order detail lines in the Extended Order Entry program.

To default the quantity committed on orders to the quantity ordered <u>for select customers</u>

- In the “Default Quantity Committed Based on a Customer Optional Field,” select the Yes/No customer optional field that will specify which customers have the quantity ordered automatically entered in the quantity committed field.



In this example, the customer optional field is “COMMITQTY -- Default QTY Committed to QTY Ordered.” The field must be a “Yes/No” type field.

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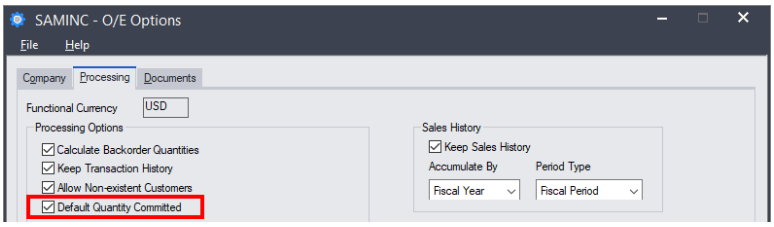
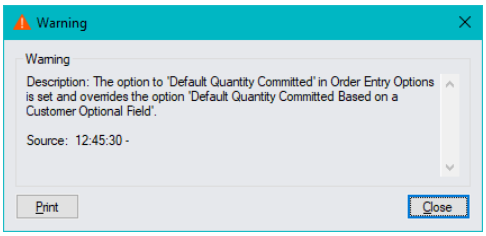
Notes:

- If you specify a Yes/No optional field -- and a customer record does not include the optional field – the program will ***not*** default the committed amount when you create an order.
- Sage 300 Order Entry Options includes an option to "Default Quantity Committed."



If the 'Default Quantity Committed' is set in Order Entry Options that setting will take precedence over the customer optional field specified here, and all customers will have the committed quantity set to the ordered quantity.

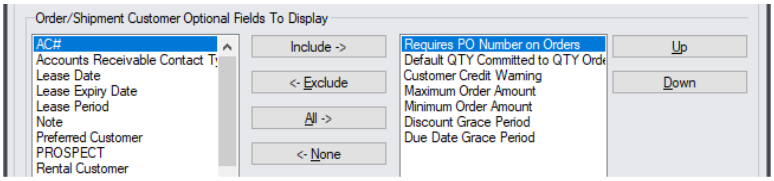
Also, the Productivity Tools Options program will display the following warning message if you choose the "Default Quantity Committed Based on Customer Optional Field" option in Productivity Tools Options with the Order Entry "Default Quantity Committed" option chosen.



No warning will appear in Order Entry Options if you choose the "Default Quantity Committed" option *after* choosing the Productivity Tools option to default the quantity committed. However, *this warning will appear* when you open the Extended Order Entry program.

To add optional fields to the Extended Order Entry and Extended Shipment Entry screens

- Highlight the optional field you want to display in the list on left side, and click the Include button.



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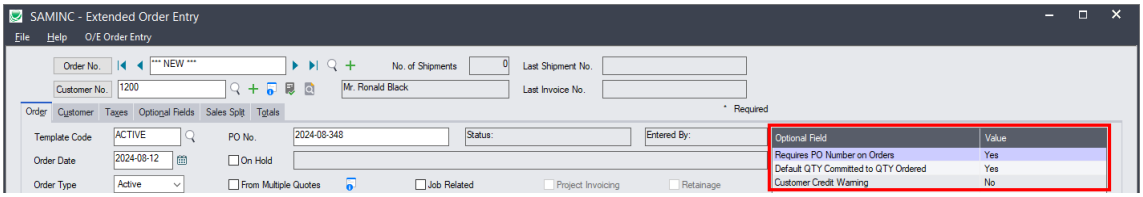
In this example, we've included the optional field "Requires Purchase Order Number" to remind users that the program will use this field to force an entry in the PO No. field. We've also included "Default QTY Committed to QTY Ordered" so users can see that quantities ordered are defaulted.

- You can use the Up and Down buttons to change the order that optional fields are displayed on the Extended Order Entry and Extended Shipment Entry screens.

The following Extended Order Entry screen shows that a value has been set for the Requires Purchase Order Number field and for the Default Quantity Committed field, so the program will force you to enter a PO number and it will default the quantity committed based on the quantity ordered.



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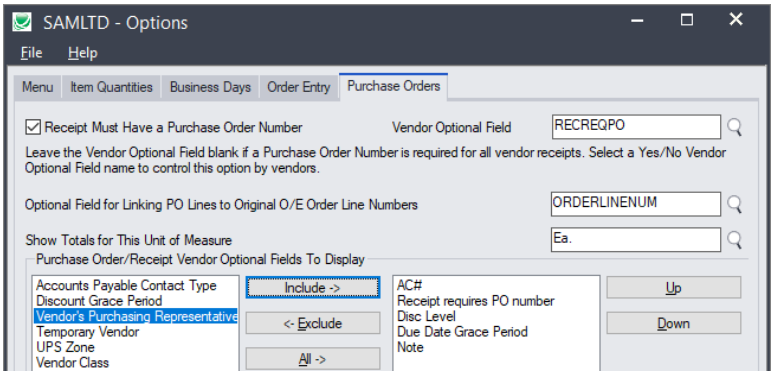
Purchase Orders Entry tab – display vendor optional fields, require PO numbers on PO Receipts, show UOM totals, and link PO lines back to the original order

The options on the Purchase Orders tab let you:

- Display vendor optional fields on Extended PO Entry and Extended PO Receipt Entry screens.
- Require PO receipts to include purchase order numbers.
- Link PO lines created from an O/E order to the original order lines.

  Note that the link to the original order line uses the database line ID for the order line – not the line number shown in the order UI. The link can be used for customized/BI reports or program additions.
- Show unit of measure totals on the Extended PO Entry screen.



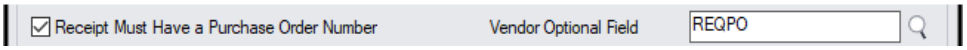
Note that Sage 300 optional fields are sold and installed as a separate module. You must install the optional field module and set up optional fields in Common Services.

- You must add vendor optional fields to vendor records before you can add them to Extended PO Entry and Extended PO Receipt Entry screens.
- To require PO numbers for particular vendors, you must add a Yes/No optional field in Common services, add the field to vendors in Accounts Payable, and then select the field in Productivity Tools Options.
- To add a link from PO detail lines to the original O/E order details, you must add an integer type line number optional field in Common services, add the field to PO detail lines, and select the field in Productivity Tools Options.

  The optional field will be populated with the O/E line number when you create a PO in Order Entry from order details using the “Create Purchase Order” button in Extended Order Entry.

To force receipts in Purchase Order Entry to include a purchase order number

- Select the checkbox for “Receipt Must Have a Purchase Order Number.”



- Optionally, select a Yes/No vendor optional field to specify which vendors require purchase orders numbers on all receipts.

  In this example, the vendor optional field is called “Require PO Number on Receipts”. The field must be a “Yes/No” type field.

  If you select the checkbox – ***and do not specify a vendor optional field*** – the program will require a purchase order number on all receipts.

Note: If you specify a Yes/No optional field -- and a vendor record does not include the optional field – the program will ***not*** require a purchase order number when you create a receipt.

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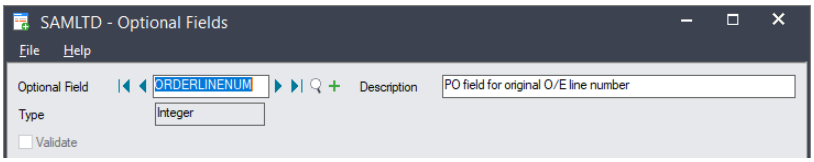
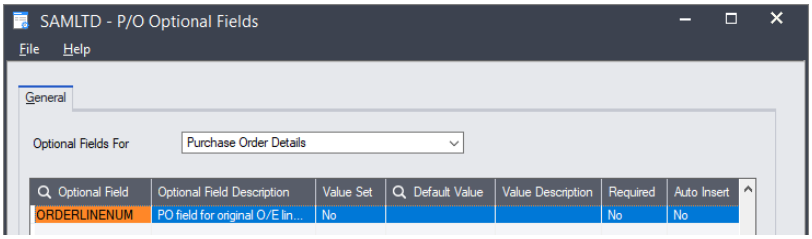
To link PO lines created from an O/E order to the original order lines

- Create a new integer optional field in Common Services and give it an appropriate name – in this example, “ORDERLINENUM”.

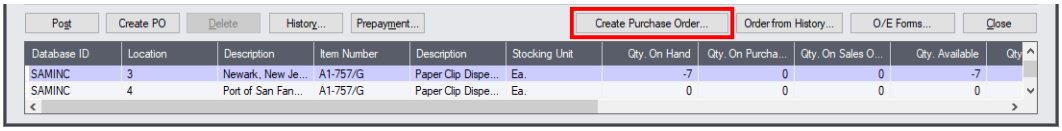


- Add the integer optional field to purchase order details using the Optional Fields program in the P/O Setup folder. Do not set a value for the field, make it required, or auto-insert it on details lines.



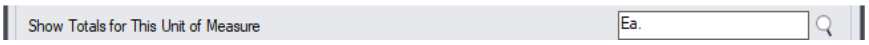
If you want the order line numbers to follow through to the receipt, invoice, CR/DR notes and returns, you should also add it to the receipt details, invoice detals, return details, and cred/debit details.

- When you create a PO in Order Entry from order details, make sure that you use the “Create Purchase Order” button in Extended Order Entry (not the “Create PO” button).

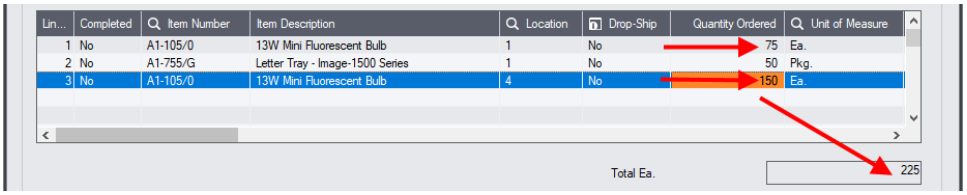


To show totals for a particular unit of measure on Extended PO Entry screens

- Select the unit of measure that you want to total. You can set the field to blank to turn off the option.



The unit of measure will be totalled on the Extended PO Entry screen.



Note that the total includes “Ea” unit of measure only. The “Pkg” unit is not included.

To add optional fields to the Extended PO Entry and Extended PO Receipt Entry screens

- Highlight the vendor optional field in the list on the left side that you want to display, and click the Include button.

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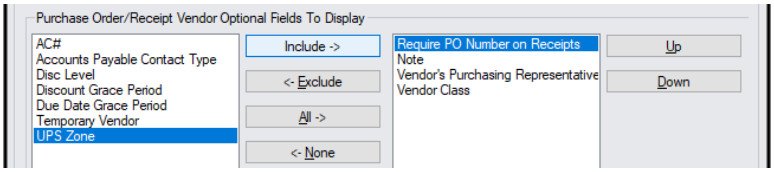
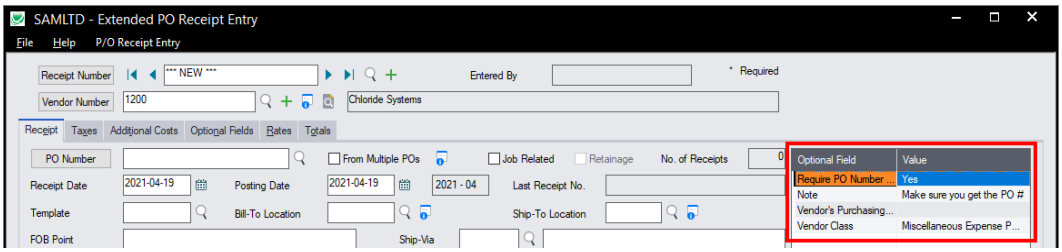


In this example, we've included the optional field "Requires Purchase Order Number" to remind users that the program will use this field to force an entry in the PO Number field on receipts.

- You can use the Up and Down buttons to change the order that optional fields are displayed on the Extended PO Entry and Extended PO Receipt Entry screens.

The following Extended Order Entry screen shows that a "yes" value has been set for the Requires Purchase Order Number field, so the program will force you to enter a PO number.



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