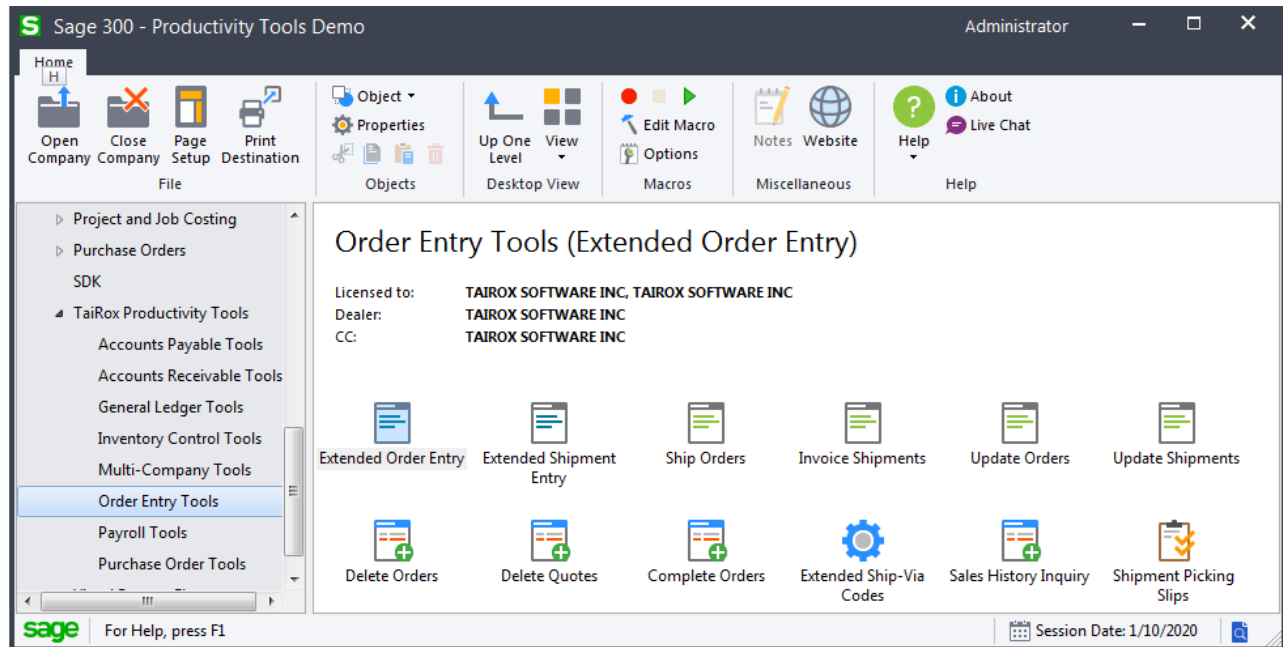


## TaiRox Productivity Tools for Sage 300

Tools for all modules are available for \$1795 + \$450 per year, a single module's tools for \$1195 + \$300 per year. This product is written as an SDK Application, integrating seamlessly with the desktop, activation and security features of Sage 300. **\*New\*** Support is provided for Sage 300 2022.



Productivity Tools add hundreds of features to Sage 300 that are listed by module on the following pages. You can click on video links in this document to watch short demonstrations of the features. All current video links are accessible at <https://www.tairox.com/videos.html>.

Dozens of **SmartFinders** are placed throughout the Productivity Tools programs. SmartFinders search for customers, vendors and items like an Internet search engine, matching multiple parts of multiple fields. There are also many links to Google Maps, web sites and email clients placed throughout the tools.

Watch an Overview: <https://vimeo.com/605874510>

## TaiRox Productivity Tools for Sage 300

### General Ledger Tools

- Maintain the same chart of accounts across multiple companies
- Show every task that needs attention before month end
- Manage calendars and fiscal years for dozens of companies

**Extended G/L Accounts** copies accounts, changing segments, from one company to many, including many options to filter, log changes, and increase speed & safety. Watch: <https://vimeo.com/610148633>

**Extended G/L Segment Codes** copies segment codes from one company to many.

**Extended G/L Accounts Groups** copies account groups from one company to many.

**Accounting Status** shows period-end status in a single window. Watch: <https://vimeo.com/610199466>

**Extended Fiscal Calendar** copies calendars from one company to many. Supports per-module locking. Watch: <https://vimeo.com/610152832>

**Extended Create New Year** creates a new year in multiple companies.

**Set Recurring Dates** resets incorrectly entered last-run dates.

**User Management** copies permissions and setup from one user to another.

## TaiRox Productivity Tools for Sage 300

### Accounts Receivable Tools

- Maintain the same customers across multiple companies
- Match and apply multiple unapplied payments to invoices
- Display receipts entered against a customer invoice and applied to a National Account

**Extended Customers\*** copies customers from one company to many. Maintains multiple contacts per customer. Includes many options to filter, log changes, increase speed & safety. Will optionally enforce Country, State and Province codes. Watch: <https://vimeo.com/610154925>

**Apply Documents** matches and applies unapplied documents to invoices. Supports manual and auto-apply matching. A payment grid & an invoice grid maximize visibility. Automated matches can be overridden manually with one click. Watch: <https://vimeo.com/610153904>

**Extended Customer Inquiry\*** adds SmartFinders, Google Map integration, multiple contacts and other functionality to Customer Inquiry. Displays receipts entered against a customer invoice and applied to the National Account number.

**Extended AR Receipt Entry\*** searches for a customer by invoice number providing a solution for the receipt of a payment that identifies an invoice, but does not identify a customer.

**Mass Billing\*\*** creates a large number of invoices for a single A/R item. Includes many options to annotate invoice batches. Logs all changes. Watch: <https://vimeo.com/610156591>

**Mail Merge\*** creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1. Includes calculated fields. Eliminates guesswork by providing meaningful field names. Watch: <https://vimeo.com/605970218>

**Extended Ship-To Locations\*** provides access to **Extended Ship-To Location\***, which will optionally enforce Country, State and Province codes. Copy Ship-To addresses from one company to many.

\* SmartFinder searches like an internet search engine.

\* You can import a list of entities to operate on.

## TaiRox Productivity Tools for Sage 300

### Accounts Payable Tools

- Show everything related to a vendor in one place (Vendor Inquiry)
- Maintain the same vendors across multiple companies
- Enforce country, state and province codes as an entry option

**Extended Vendors\*** copies vendors from one company to many. Maintains multiple contacts per vendor. Will optionally enforce Country, State and Province codes. Watch: <https://vimeo.com/610157508>

**Vendor Inquiry\*** adds 20 dynamic tabs of information for managing purchases. SmartFinder searches for vendors like an internet search engine. **Vendor Document Inquiry\*** adds 7 additional tabs of information about vendor documents and is launched from Vendor Inquiry. Watch: <https://vimeo.com/610158599>

**Extended Create Payment Batch** enables more than one system-generated batch to be unposted.

**Mail Merge\*\*** creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1. Includes calculated fields. Eliminates guesswork by providing meaningful field names. Watch: <https://vimeo.com/605970218>

**Extended Remit-To Locations\*** provides access to **Extended Remit-To Location\***, which will optionally enforce Country, State and Province codes. Copy Remit-To from one company to many.

\* SmartFinder searches like an internet search engine.

\* You can import a list of entities to operate on.

## TaiRox Productivity Tools for Sage 300

### Inventory Control Tools

- Maintain the same item across multiple companies
- Perform stock reorder calculations with export/import to Excel
- Delete items or BOMs no longer in use

**Extended Inventory Items** copies items, changing segments, from one company to many. Includes many options to filter, log changes, and increase speed & safety. Item descriptions can be copied to multiple tables in one step. Copy an item, including all its optional fields, to a new item in the same database. An **Item-In-Use** button will show all table references to an item. SmartFinder searches for items like an internet search engine. Watch: <https://vimeo.com/605958182>

**Extended Locations** copies locations from one company to many and provides links to Google Maps and email clients.

**Extended I/C Segment Codes** copies segment codes from one company to many.

**Extended Vendor Details\***, **Extended Customer Details\***, **Extended Manufacturers' Items\***

**Extended Item Pricing\*** copies prices from one company to many.

**Stock Reorder** performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions.

<https://vimeo.com/605967657>

**Mail Merge\*\*** creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1. Includes calculated fields. Eliminates guesswork by providing meaningful field names. Watch: <https://vimeo.com/605970218>

**Delete Items\*** provides a way to see all inventory items that are safe to delete. Checks for known third-party references to items. Deletes items when safe to delete.

**Delete BOMs\*\*** provides a way to delete hundreds of old or unused bills of material (BOMs) in one operation.

**Kit Component Usage Inquiry** lets you quickly list kits where items appear as components, drill down to kit components, and change them if necessary.

**Fix Item Valuation Errors** repairs item valuation errors in your data.

\* SmartFinder searches like an internet search engine.

\* You can import a list of entities to operate on.

## TaiRox Productivity Tools for Sage 300

### Order Entry Tools, part 1 of 2

- Add dozens of powerful operations to the order entry form
- See selected customer optional fields, right on the order entry form
- Force a purchase order number to be entered for selected customers
- View item quantities at other locations or databases in 2 different ways

Type	Item No. / Misc. Charge	Kt./BOM	Description	Price List	Location	Deliver By	Exp. Ship Date	Qty. Ordered	Order UOM	Order Weight UOM
Item	A1-103/0		Fluorescent Des...	USA	4	1/15/2019	1/15/2019	10	Ea.	lbs.
Item	A1-105/0		13W Mini Fluore...	USA	1	1/15/2019	1/15/2019	15	Ea.	lbs.
Item	A1-400/0		Desk Note Book	USA	4	1/15/2019	1/15/2019	3	Ea.	lbs.
Item	A1-450/0		Bulletin Board	USA	4	1/15/2019	1/15/2019	2	Ea.	lbs.

Location	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 4 (Ea.)	206	10	0	0	206
All Locations (Ea.)	657	34	436	0	657

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purcha...	Qty. On Sales O...	Qty. Available	Qty. Committed
SAMLTD	Sample Compan...	1	Central warehou...	A1-103/0	Fluorescent Des...	Ea.	137	260	15	137	0
SAMINC	Sample Compan...	1	Central warehou...	A1-103/0	Fluorescent Des...	Ea.	137	310	1	137	0

**Extended Order Entry\*** shows prices, quantities and comments in a finder. Shows margins and most recent costs. Prints picking slips, invoices, quotes & confirmations. Edits kit details on an order. Views history, selecting line details from previous orders. Displays picked items in picking slip order. Shows quantities available at other locations or companies. An update button enables multi-faceted changes to be made to all lines in an order. A Line Finder helps you deal with a PO with dozens or hundreds of lines. Configure selected customer optional fields to appear right on the order entry form. Force a purchase order number to be entered for selected customers. Watch: <https://vimeo.com/605974010>

\* SmartFinder searches like an internet search engine.

## TaiRox Productivity Tools for Sage 300

### Order Entry Tools, part 2 of 2

- Ship hundreds of orders and invoice hundreds of shipments in one operation
- Update hundreds of orders in one step, in dozens of different ways
- Complete or delete hundreds of old orders or quotes in a single step

**Extended Shipment Entry\*** shows prices, quantities and comments when selecting items. Shows margins and most recent costs. A ship button displays picked items in picking slip order. Settings enable quick printing of picking slips without showing intermediate windows. Displays quantities available at other locations or companies.

**Extended Ship-Via Codes** copies ship-via codes from one company to many and provides links to Google Maps and email clients.

**Ship Orders\*** ships hundreds of orders and optionally invoicing at the same time. Watch: <https://vimeo.com/609935348>

**Invoice Shipments\*** invoices hundreds of shipments with many consolidation options. Watch: <https://vimeo.com/609937210>

**Shipment Picking Slips** provides greater flexibility for printing picking slips, letting you select shipments using ranges of shipments, customers, and optional fields, then cherry-pick the results before printing.

**Update Orders\*** updates BOMs, kits or items for hundreds of orders. Updates prices from price lists, expected ship dates, deliver by dates, on hold status and customer addresses. Zeros quantities for items not in stock. Watch: <https://vimeo.com/609933815>

**Update Shipments\*** updates prices or ship dates for hundreds of shipments.

**Delete Orders\*** deletes old orders to correct item quantities and speed up day-end. Watch: <https://vimeo.com/609939604>

**Delete Quotes\*** deletes thousands of old quotes and speeds up day-end. Watch: <https://vimeo.com/609940849>

**Complete Orders\*** completes old orders that will never be filled, correcting quantities. Watch: <https://vimeo.com/609938913>

**Sales History Inquiry\*** quickly finds most recent costs and prices for an item.

**Extended OE Credit Debit Note Entry\*** lets you select details from an OE invoice to be included in the note.

\* SmartFinder searches like an internet search engine.

\* You can import a list of entities to operate on.

## TaiRox Productivity Tools for Sage 300

### Purchase Order Tools

- Add many powerful operations to the PO entry and receipt entry forms
- Update hundreds of purchase orders in one step, in dozens of different ways
- Complete or delete old purchase orders, updating inventory quantities

**Extended PO Entry\*** shows item quantity information just like on the order entry screen. While viewing history, selects line details from previous POs. Display quantities available at other locations or in other companies while entering a purchase order. A Line Finder helps you deal with a PO with dozens or hundreds of lines. Watch: <https://vimeo.com/609959401>

**Extended PO Receipt Entry** shows item quantity information just like on the order entry screen. A receive button displays items on the PO in several different sort orders. Drop ship to dozens of detail lines in a single operation. Display quantities available at other locations or in other companies while entering a receipt. SmartFinder searches for receipts and vendors and items like an internet search engine.

**Extended PO Invoice Entry** shows all receipts related to a vendor so that they may be quickly matched to an invoice. A vendor is related to a receipt if they are the primary vendor or an additional cost vendor.

**Stock Reorder** performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions. Watch: <https://vimeo.com/605967657>

**Update Purchase Orders\*** updates vendor costs for hundreds of purchase orders. Updates expected arrival dates for hundreds of purchase orders.

**Delete Purchase Orders\*** deletes old purchase orders to correct item quantities. Watch: <https://vimeo.com/609964966>

**Complete Purchase Orders\*** completes old purchase orders, correcting item quantities. Watch: <https://vimeo.com/609962780>

**Complete Zero Receipts\*** finds and completes purchase order receipts with zero cost. Watch: <https://vimeo.com/609963743>

### Payroll Tools

- Synchronize timecard data to an updated master table
- Send mail-merged letters to employees with field names

**Sync Timecards** synchronizes timecard data with updated master table entries. Includes many options to filter employees, logs all changes.

**Mail Merge\*\*** creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1. Includes calculated fields. Eliminates guesswork by providing meaningful field names.

\* SmartFinder searches like an internet search engine.

\* You can import a list of entities to operate on.