TaiRox™ Memo
Using SmartFinders™

Finders in Sage 300

Finders let you look up items, customers, and vendors when you don't know their record numbers. A pop-up window provides ways to search for the record number based on what is known, typically a portion of the description. TaiRox SmartFinders appear in enhanced versions of Sage 300 screens.

Quick Examples using CRM & Collections SmartFinders

- Enter "300 Main" to match both "300 Main St" and "123 Main St, Suite 300" entries.
- Enter "451 8991" to match both "(451) 555-8991" and "(408) 451-8991" entries.

Compare Finders and TaiRox SmartFinders

Sage 300 Finders	TaiRox SmartFinders
Sage 300 Finders search only one field at a time.	TaiRox SmartFinders search multiple fields and tables at the same time.
Sage 300 Finders search in a structured way. A single word (or word portion) is used to search a single field in a single table to find a customer, vendor, or item number. You have to say which field is to be used for the search.	TaiRox SmartFinders search like an internet search engine. Enter a word (or word portion) to search through multiple fields and multiple tables. Too many results? Add a second or third word - just like for an internet search.
Sage 300 Finders don't consider the context. A customer finder in order entry is the same program that is used in accounts receivable. A vendor finder in purchase orders is the same program that is in accounts payable.	TaiRox SmartFinders are context sensitive. A customer SmartFinder in order entry searches ship-to tables as well as customer tables. A vendor SmartFinder in purchase orders searches remit-to tables as well as vendor tables.
The Sage 300 Inventory Finder doesn't consider that thousands of inventory items entered over many years may have very inconsistent descriptions. Searching for 2" Brass Screw won't find Screw Brass 2".	TaiRox SmartFinders treat each word (or word portion) independently. Searching for 2" Brass Screw will find Screw Brass 2" or Brass Screw 2" or Brass 2" Screw or any other combination of the 3 search words.
Sage 300 Finders typically display inactive items. There may be a lot of these, cluttering up the search results.	TaiRox SmartFinders typically have an "Active Items Only" checkbox. One click excludes these items from the search.
All Sage 300 Finders display a single grid, so what you are looking for better be in the primary table.	TaiRox SmartFinders display multiple grids and sometimes multiple tabs. See the pictures at the end of this document.

How Fast Are SmartFinders?

SmartFinders create database queries that are passed directly to SQL Server. In other words, the queries are as fast as possible. Results are typically returned in a fraction of a second.

https://www.tairox.com

Searching – Mini Case Study #1

You provide credit to a core set of customers, but you have many more one-off customers that pay cash. For warranty - or other reasons - you track the one-off customers as ship-to addresses for the same generic customer. When a one-off customer wants to place an order, you can't find them by searching through the customer table. The TaiRox SmartFinder will search the ship-to details as well as the customer details. The SmartFinder will find the customer, even if you only know a phone number or part of an address. It will display customers on a top grid and ship-to addresses on a bottom grid. Selecting a ship-to address on the bottom grid will populate both the customer number and the ship-to address on the order entry screen.

Searching – Mini Case Study #2

A customer is phoning in an order. They don't know your item number, but they <u>do know</u> the manufacturer's item number. The TaiRox order-entry item SmartFinder has a manufacturer's item tab so you can search through that table. The SmartFinder, as always, will search multiple fields, treating each word (or word portion) independently,

Productivity Tools SmartFinder Pictures That Follow

- **Order Entry** SmartFinders for orders, customers and items (2 tabs)

Order Entry Order Finder

The order table is searched. The top grid displays the matching orders and the bottom grid displays the items on the selected order in the top grid. Order types can be selected from a drop-down list. Completed or On-Hold orders can be included or excluded with one click.

Order Entry Customer Finder

The customer and ship-to tables are searched. The top grid displays the matching customers and the bottom grid shows the matching ship-to addresses. Inactive customers can be included or excluded with one click. Selecting from the bottom grid populates both the customer and ship-to codes on the order entry form.

PTDEMO - Extended Order Entry

File Help

Search: ba   [Find]

☐ Active Customers Only

Customer Number	Status	Customer Name	Short Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City
1100	Active	Bargain Mart - S...	BMT-SD	Bargain Mart Plaza	Corner 182nd and...			Any
1105	Active	Bargain Mart - O...	BMT-OK	Bargain Mart Plaza	Corner 182nd and...			Any
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road				Los
1240	Active	The Courtyard	COURT	10349 Sherman C...				Fai
1580	Active	Break-Away Des...	BREAK	743 Wark Street				Sac
1970	Active	Mr. Ronald Engli...	ENGLI	2375 Hudson Ave...				Fai
7100	Active	Bashaw Bulldozi...	BASHAW	2398 Colorado Cres.				Bur
BARMART	Active	Bargain Mart Sto...	BARMART	Bargain Mart Plaza	Corner 182nd and...			Any

☐ Active Ship-To Locations Only

Customer Number	Ship-To Location	Status	Description	Address Line 1	Address Line 2	Address Line 3	Address Line 4
1200	WAREHS	Active	Warehouse	Receiving Dock 17	Wabash Industrial ...		
1400	FIRST	Active	First National Ba...	#10 Central Boule...			

[Select]   [Cancel]

Order Entry Item Finder - Items Tab

Both the Item table and the Customer Item table are searched and displayed. Active items can be included or excluded with one click.

PTDEMO - Extended Order Entry

File Help

Items | Manufacturer's Item Number

Find Items By

[Search ▼]   bulb

Location: 1   Central warehouse - Seattle

Price List:

☐ Active Items Only

Item Number	Description	Price	Qty. Available	Qty. Available (All)	Status	Comment 1
A1-105/0	13W Mini Fluorescent Bulb		70	378	Active	Replacement bulb.
A1-320/0	50W/12V Halogen Bulb		80	135	Active	Replacement bulb.

Customer Item Numbers

Customer's Item Number	Customer's Item Description	Customer Name	Unit of Measure	Comments	Instructions
LIGHT BULB 13W	Light bulb mini	Mr. Ronald Black	Ea.		

[Find]   [Select]   [Cancel]

Order Entry Item Finder - Manufacturer's Tab

The Manufacturer's Item table is searched and displayed.

PTDEMO - Extended Order Entry					— □ ×

File   Help

Items	Manufacturer's Item Number

Find Items By

Search ⌄   001

☐ Active Items Only

Manufacturer's Item Number	Manufacturer's Item Description	Item Number	Description	Price	Qty. Available	Qty
A1001	Accessories – Lamp	A1-103/0	Fluorescent Desk Lamp		137	
MN000103	Bar Code - screens	S1-200/B	Flat Screen 5'6 H x 5'W		71	
MN000105	Bar Code - screens	S1-300/R	Curved Screen 5'H x 6'W		0	
S1001	Flat Screen	S1-200/B	Flat Screen 5'6 H x 5'W		71	
S1001	Flat Screen	S1-200/R	Flat Screen 5'6 H x 5'W		0	
S1001	Flat Screen	S1-200/W	Flat Screen 5'6 H x 5'W		0	
S1001	Flat Screen	S1-200/Y	Flat Screen 5'6 H x 5'W		0	

Find				Select	Cancel

Similar Or Analogous SmartFinders to Those Shown Above

- **Shipment Entry** SmartFinders for shipments, orders, customers and items.
- **Purchase Order Entry** SmartFinders for purchase orders, vendors and items.
- **Receipt Entry** SmartFinders for receipts, purchase orders, vendors and items.