

Extended Customer Inquiry

Extended Customer Inquiry provides a convenient way to view all the data related to a Sage 300 customer. Each tab focuses on one aspect of the customer's data.

Extended Customer Inquiry enhances the Sage 300 Customer Inquiry function by letting you:

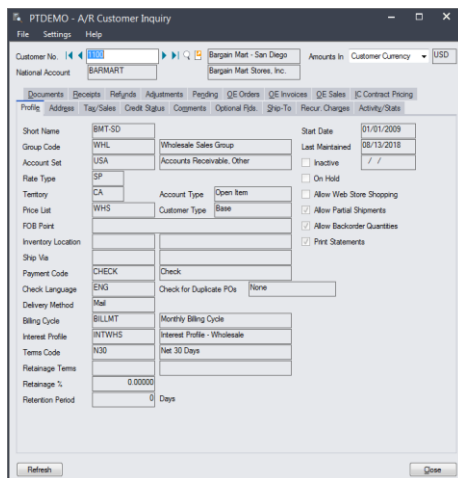
- Use a customer SmartFinder for browser-like customer lookups.
- View multiple contacts per customer that were added with the TaiRox Extended Customers form.
- Click the Address button to display customer addresses in Google maps.
- Click the E-mail button to create new emails for customer and contact email addresses.
- Click the Web Site button to display customer web sites in a browser.
- Display receipts entered against a customer invoice and applied to the national account member
- Drill-down to the TaiRox Extended Customers UI form

The following screen displays all 20 Extended Customer Inquiry tabs. Some tabs may not appear on your screen, depending on your user permissions and which Sage 300 applications your company uses.

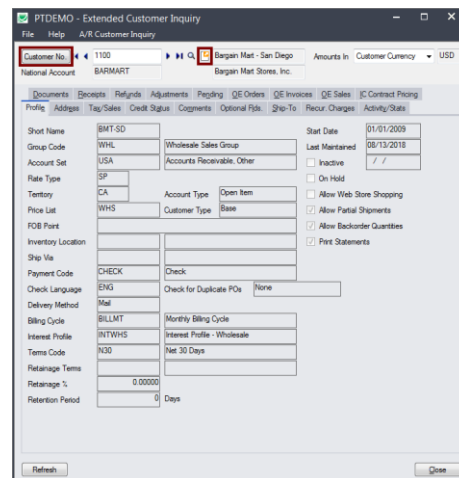
The Customer No. button provides access to a “SmartFinder” search function that searches multiple columns in both customer and ship-to locations and displays all matches – like a modern browser search engine.

Similar buttons appear on the Address tab.

Sage A/R Customer Inquiry screen

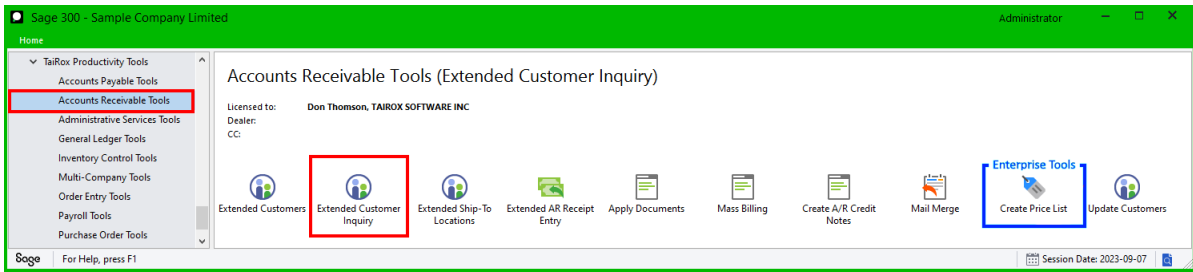


TaiRox Extended Customer Inquiry screen



Using Extended Customer Inquiry

The Extended Customer Inquiry icon appears under **TaiRox Productivity Tools > Accounts Receivable Tools** on the Sage 300 desktop and can be copied to other menu locations.

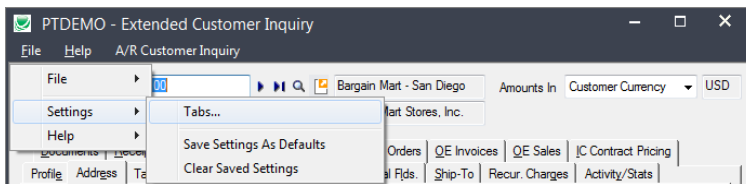


Note that Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.

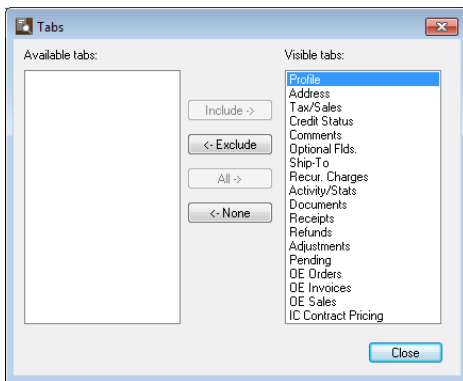
Control which tabs appear

You can control which tabs appear on the Extended Customer Inquiry screen.

- Click on **A/R Customer Inquiry > Settings > Tabs.**



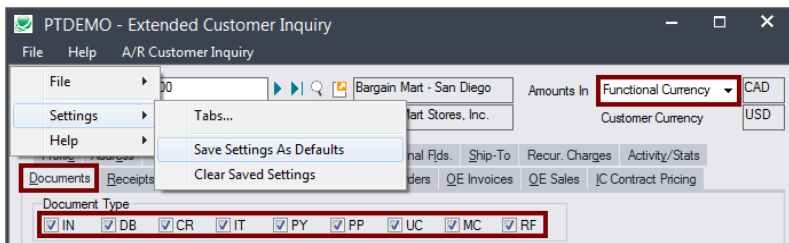
- Select tabs using the following form. The example below shows that all tabs will be displayed.



Control the default tab, document selection settings, and currency choice

You can also control which tab is selected by default when you open the Extended Customer Inquiry screen, which settings are used for data selection on each tab, and whether amounts are displayed in Customer Currency or Functional currency (in multicurrency systems).

- Choose the default settings you want for each tab in A/R Customer Inquiry and choose which current you want to display by default.
- Click on the tab that you want to display when the window opens.

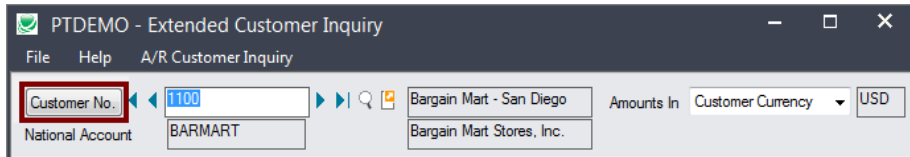


- Click on **A/R Customer Inquiry > Settings > Save Settings as Defaults.**

In the above example, amounts will appear in functional currency and the Documents tab will be displayed first by default – using the Document Type settings that appear above.

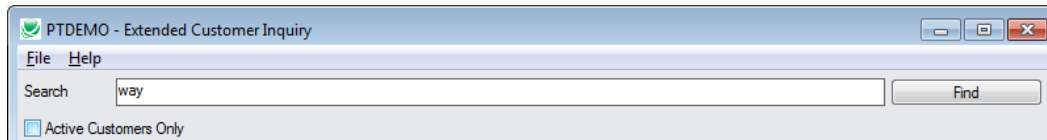
Look up Customers with the SmartFinder

Click the Customer No. button at the top of the form to open the SmartFinder for searching customers.



Search:

- Enter one or more words or word fragments in the search entry field to search multiple tables and fields.



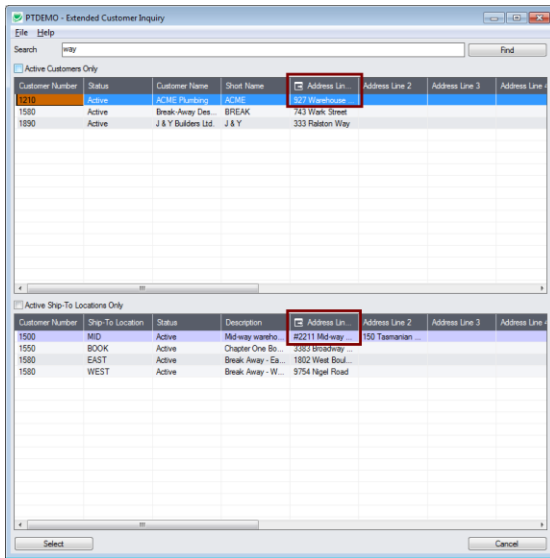
- You can also filter for Active customers.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have “way” in the name, where another may have it in the address field. Both records will be displayed.
 - **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
 - **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

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

Display:

- The top grid displays the customers matching the search criteria.
 - The bottom grid displays the ship-to locations that match the search criteria.
- Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen. The screen below displays ship-to locations for two different customers.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the customer 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.



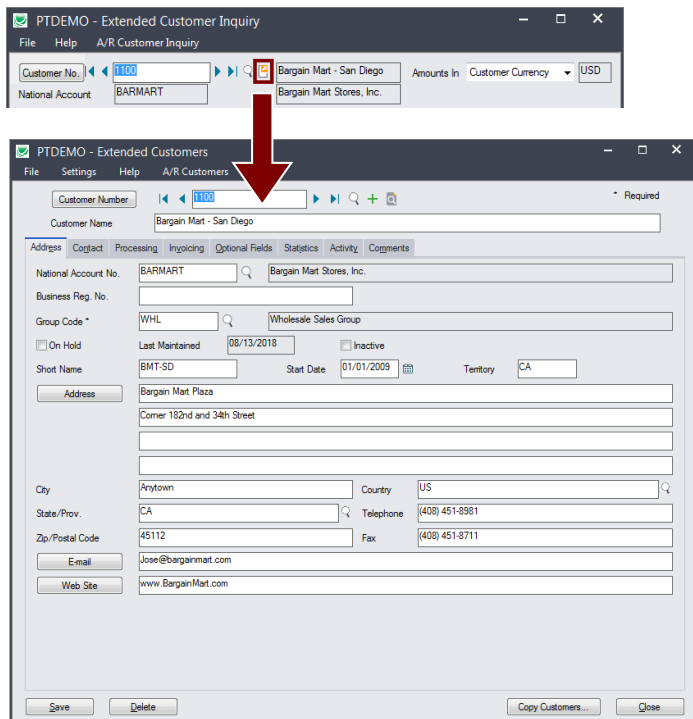
Selection:

- Double-click a customer in the top grid to select and enter the customer on the Extended Customer Inquiry form.
- Double-click a ship-to location in the bottom grid to enter the customer.

Drill down to the Extended Customers screen

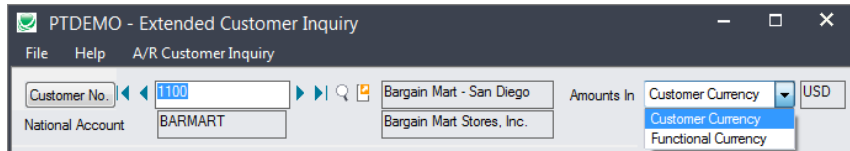
The Drill Down button beside the Customer Name field displays the TaiRox Productivity Tools Extended Customers screen (or the Sage 300 A/R Customers screen if the TaiRox program is not enabled), allowing you to edit the customer information – or copy the customer to other Sage 300 databases.

You can also look up and edit the details for other customers while you are on this screen.



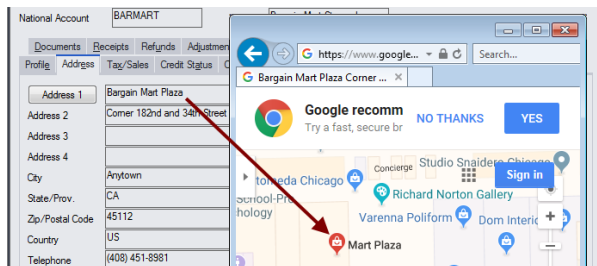
Choose the Customer currency

- For multicurrency systems, choose whether to view figures in the customer currency or in your functional currency.



Look up addresses in Google maps

- Click the Address button on the Extended Customer Inquiry Address tab to confirm addresses.



- Click the Address Line 1 column headings for ship-to address column headings to confirm the location of the selected ship-to address.

Description	Status	Date Last Mai...	Optional Fields	Address Line 1	Address Line 2
Kamloops Credit...	Active	8/18/2010	Yes	15077 University Avenue	
First National Ba...	Active	8/18/2010	Yes	325 Sasmat Street	

Launch emails for customers and customer contact email addresses

- Click the E-mail or Contact's E-mail button on the Address tab to quickly create a new email.

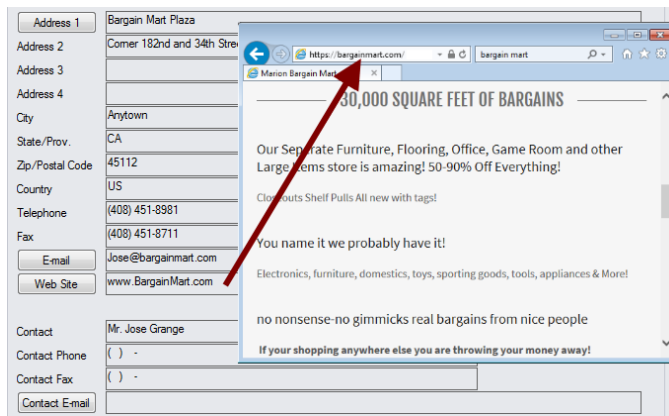


- You can also click the Email column heading to create an email for the selected additional contact.

Contact's Email	ckjenner@chloudeus.com
Office	5-1871
Phone (Other)	
Email	ckjenner10... does not use
Notes	Get approval f o @RealBamyWhite
Inactive	No
Date Inactive	3/15/2
Date L	3/15/2

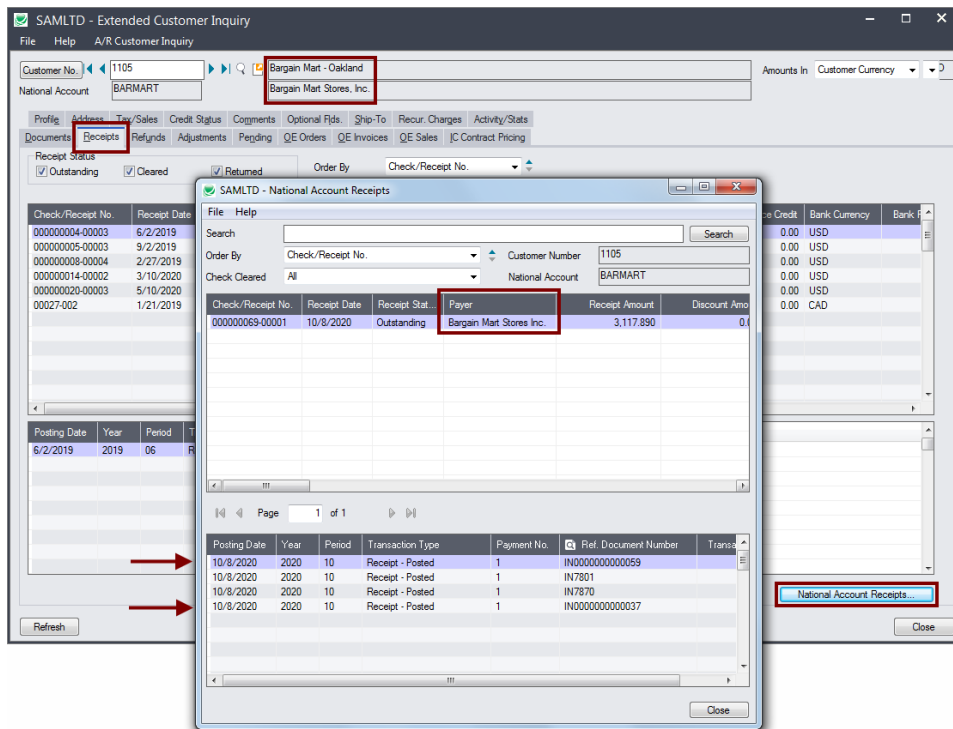
Look up Web sites in your browser

- Click the Web Site button on the Extended Customer Inquiry Address tab to look up customer Web sites.



View receipts for customers where the National Account is the payer

- Select the customer account in the SmartFinder and select the Receipts tab.
- Click the National Account Receipts button at the bottom of the screen to view all payments from the national account on behalf of the customer.



In this example, Bargain Mart Stores Inc. made a payment that included two invoices for Bargain Mart – Oakland.

You can view the receipt by looking up Bargain Mart – Oakland, then choosing National Account Receipts – or by looking up the BARMART customer account.