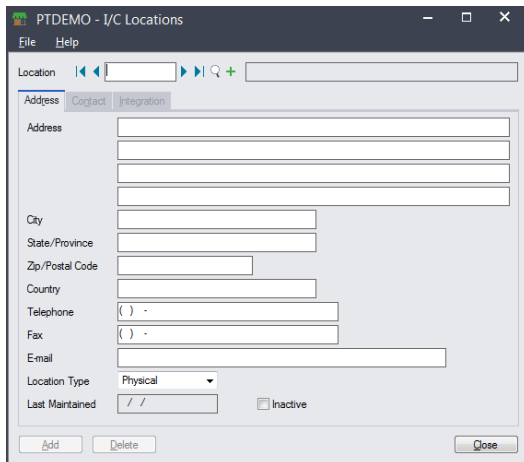# Extended Locations

Extended Locations is an enhanced replacement for the Sage I/C Locations screen. It provides you with more functionality for adding and maintaining locations, and lets you copy existing location records to other Sage 300 company databases.
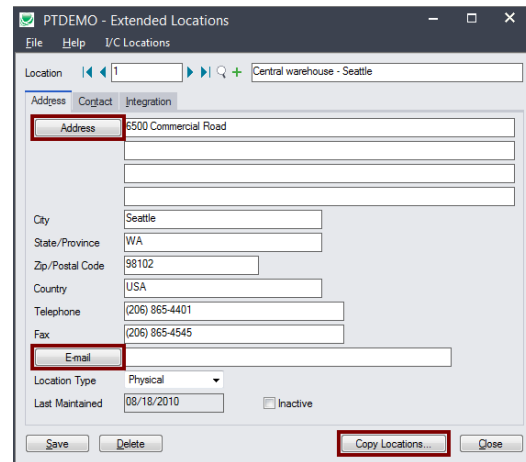
Extended Locations lets you:

- Click the Address button to launch **Google Maps** with the location address.

- Click the E-mail button on the Address and Contact tabs to email the location or to email the location contact.

- Maintain a full or partial set of locations across multiple Sage 300 companies using the Copy Locations functionality.

  - Specify a range of locations from the current company, filter them by additional criteria, cherry-pick locations 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 updated locations.

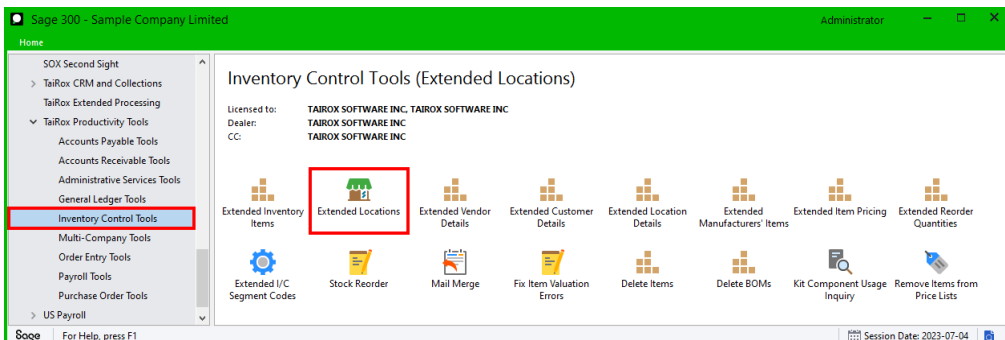The following screens show the extra features provided by the Extended Locations screen:

Sage I/C Locations screen   **TaiRox Extended Locations screen**
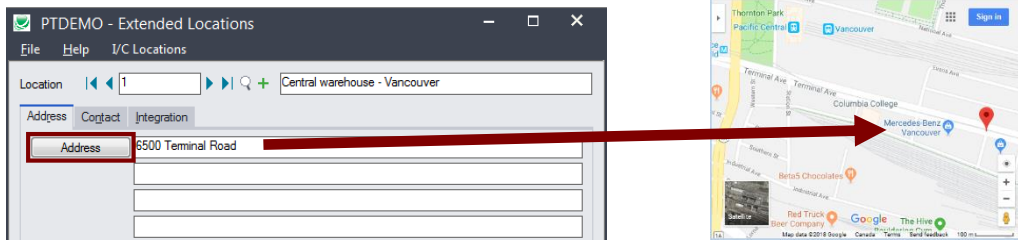

The Extended Locations icon appears under **TaiRox Productivity Tools > Inventory Control Tools** on the Sage 300 desktop and can be copied to other menu locations.
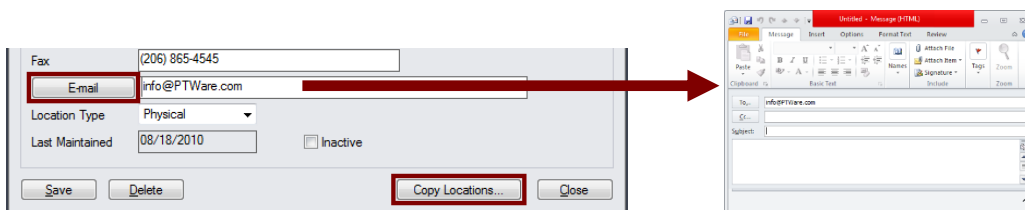
Look up addresses in Google maps

- Click the Address button on the Extended Locations Address tab to confirm the location.

Launch emails for location or contact email addresses

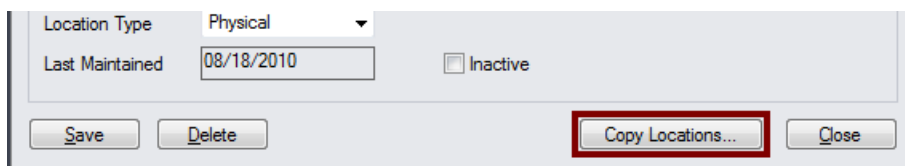- Click the E-mail button on the Address or Contact tabs to quickly create a new email.

Copy Locations to other Sage 300 companies

IMPORTANT:

You must enter a User ID and Password to copy location information. Make sure the User ID you enter for the copy procedure has sufficient rights to complete the operation in the *target* companies.
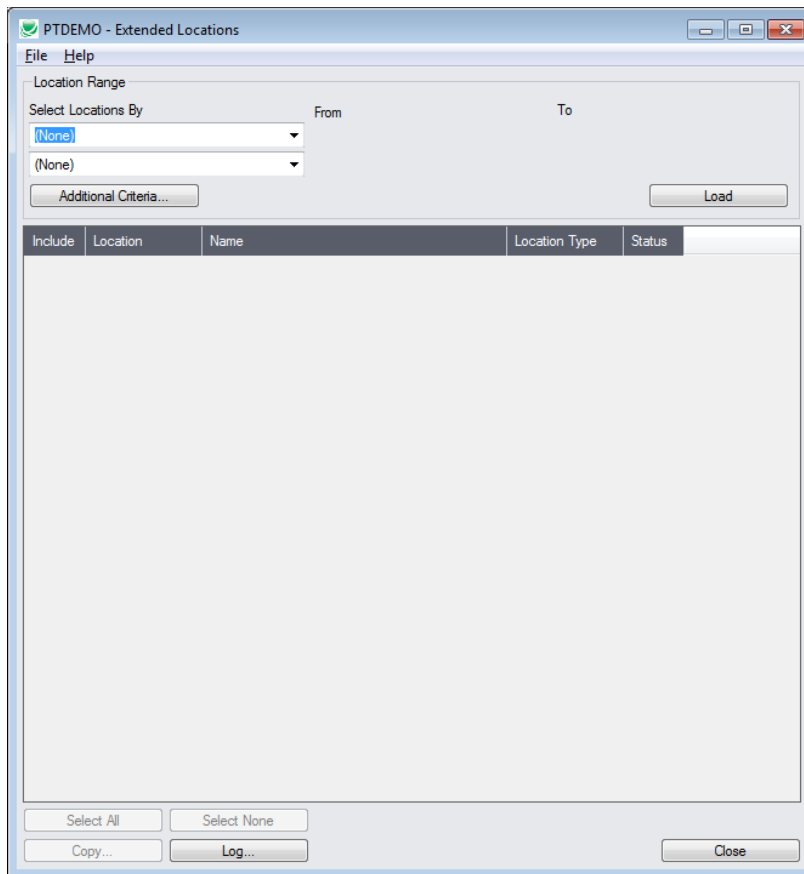
If you are inserting new locations in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the locations that you want to copy.
  - Copy Locations operates from within an existing "source" company, and lets you copy item information to other Sage 300 company databases.
- Open the Extended Locations form, and click the Copy Locations button at the bottom of the form

When the Copy Locations button is pressed, a window will pop up for selecting locations in the current (source) company.

You can select a range of Locations and a range of location types.

Note: By default, the grid at the bottom of the form will display any new locations that were added in this session. This allows you to bypass the selection process and copy these new locations directly to other Sage company databases.
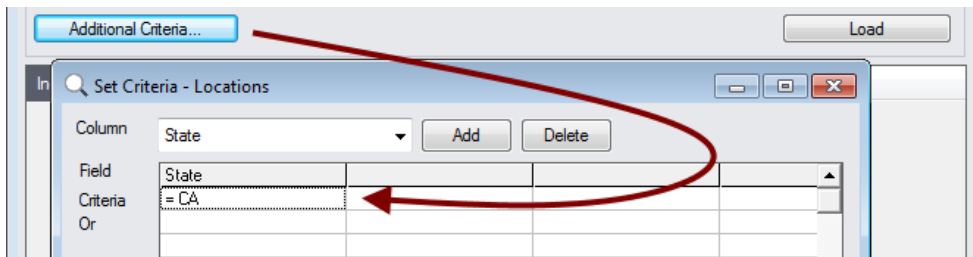
To copy or update any set of locations, start at the top of the form to specify the range of locations that you want to copy or update. The program displays the last set of ranges and filters used for copying and updating locations. Click the Load button to use the previous settings.

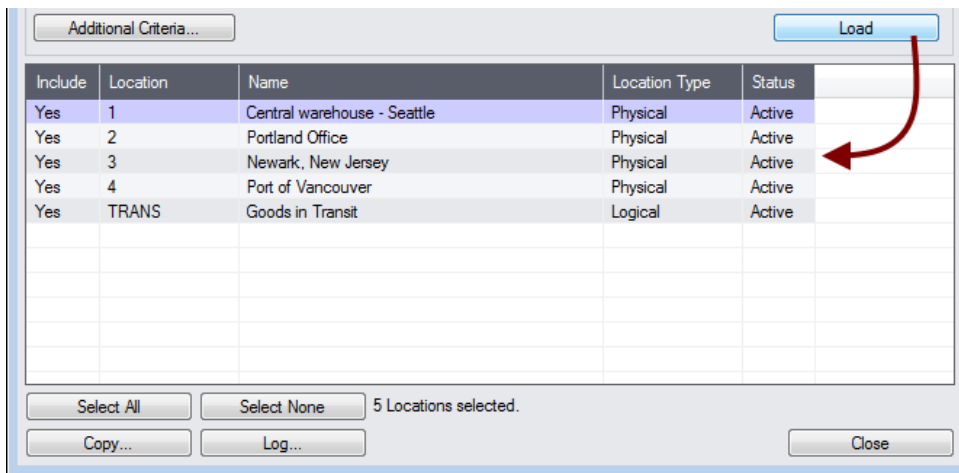## Specify a range of locations for copying:

- You can specify a range of locations and location types.

Choose additional criteria:

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

Load the list of locations and choose which ones to copy:
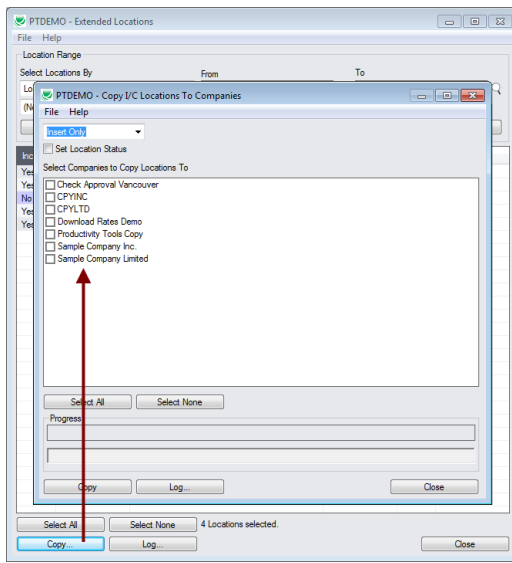

- Click the Load button to display the list of locations.

  When the Load button is pressed, the program will display the locations in the range and with the additional criteria you specified.

  o 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 locations loaded in the grid.

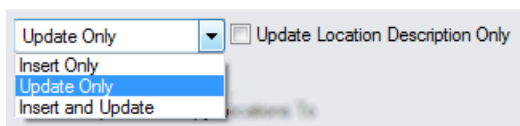- Double-click in the Include column to "cherry-pick" locations:

Click the Copy button to display the To Companies screen:

Select whether to insert new locations 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 that's changed.

- Choose whether to insert, insert and update, or just update locations.
  - o Insert Only will only add locations if the code does not already exist.
  - o Update Only will only update locations that already exist.
  - o Insert and Update will perform both of these operations.

- Except for the special case of changing the description only, an update operation will attempt to change the item in the target company to be just like the item in the source company.

  It's possible for the update to fail if properties don't match or locations are in use.

Update Location Description Only

- Update Location Description Only appears for Update Only.

  This checkbox will change location descriptions only – it doesn't matter whether other location properties match.

Set Location Status

- If you choose Set Location Status

  - o Location will be set to Active if the target location already exists.
  - o Location will be set to Inactive if the location in the target does not already exist.

    (Locations that already exist are not set inactive in target because you cannot set a location inactive if there are quantities or costs at that location.)

- Note that Set Location Status (active/inactive) is **not selected** by default. This means that you can have locations that are active in some companies and not in others – and the program will update their addresses in either case.

Select target Sage companies:

- Click the Select All and Select None buttons at the bottom of the form 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 locations:

- 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 locations in the target companies for copying to proceed.

- The program will copy the location information to the target companies.

- If no changes are required for a selected location, no update will be performed – so the audit stamp will be preserved.

- If you cancel the operation during the copying process, you must check the log to see which procedures were completed and assess how you want to continue.

Click the Log button to confirm which Locations were processed:

```
7/23/2020 2:26:45 PM Copy I/C Locations To Companies started.
7/23/2020 2:26:45 PM
7/23/2020 2:26:45 PM Logged in user: ADMIN
7/23/2020 2:26:45 PM Performed by user: MORGAN
7/23/2020 2:26:45 PM
```

```
7/23/2020 2:26:45 PM Update Only
7/23/2020 2:26:45 PM Update Location Description Only: No
7/23/2020 2:26:45 PM Copy Locations to Companies: Sample Company Inc.
7/23/2020 2:26:45 PM
7/23/2020 2:26:45 PM Copying locations from Productivity Tools Demo to Sample Company Inc.
started.
7/23/2020 2:26:45 PM     Logging in to Sample Company Inc....
7/23/2020 2:26:45 PM     Updating location TRANS...
7/23/2020 2:26:45 PM         No update required.
7/23/2020 2:26:45 PM     Updating location 1...
7/23/2020 2:26:45 PM         Location updated.
7/23/2020 2:26:45 PM     Updating location 2...
7/23/2020 2:26:45 PM         Location updated.
7/23/2020 2:26:45 PM     Logging off of Sample Company Inc....
7/23/2020 2:26:45 PM
7/23/2020 2:26:45 PM     There was 2 locations updated.
7/23/2020 2:26:45 PM     There was 1 location not updated.
7/23/2020 2:26:45 PM Copying locations from Productivity Tools Demo to Sample Company Inc.
complete.
7/23/2020 2:26:45 PM
7/23/2020 2:26:45 PM
7/23/2020 2:26:45 PM Copy I/C Locations To Companies complete.
7/23/2020 2:26:45 PM
==============================================================================
```

The Log lists:

- The user, the type of operation performed, and the range of locations.

- Each item that was processed and whether the locations were updated or inserted.