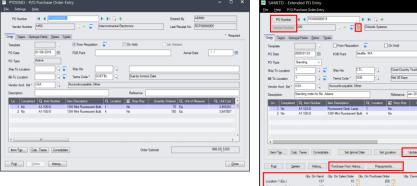
Extended PO Entry

Extended PO Entry is an enhanced replacement for the Sage Purchase Orders Entry form. It provides you with more information while entering a PO and fast access to additional PO, Vendor, and Item information.

The following pictures show some of the extra features on the Extended PO Entry screen:

Sage Purchase Order Entry screen

TaiRox Extended PO Entry screen



PO Number	PO000000015		▶ N Q +			00.09	ADMIN					
Vendor Number	200	् + 🕫 🛛	Chloride System	18	Last	Receipt No.						
Ordgr Tages Opti	ogal Fields Bates Tgl	á						* Requir	ed			
Template	Q	From Requisition	5	On Hold	Job Rel	ated			Optional Reid		Value	
PO Date	2020-01-23 💼	FOB Point S	eattle, WA			Artval D	ate 🔤		Require PO No	mber on Receipts	Yes Make sure you	and the PO F
PO Type	Standing ~								Vendor's Purch	asing Representative		
Ship-Te Location	1 9 5	Shp-Va	n. Q	Cross-Count	y Trucking Lines				Vendor Class		Macelaneous E	xpense Purch
Bill-To Location	1	Terms Code *	30 0	Net 30 Days					ĩ			
	USA	Accounts payable, Oth	er									
Description	Stending order for Ma. Ad	471		Beference	Jan 2010 PO							
Lin Completer	Q, Item Number	tem Description	Q Location	Drop-Ship	Quantity Ordered	0.184.41	Manage	Q, Unit Cost	Extended Cest	Decourt % D	acourt Amount	Discounted B
1 No		Ruorescent Desk Lanp	1	No	15	Ea.		19.990000	299.85	0.00000	0.00	Decod feed to
2 No	A1-105/0	13W Mini Ruorescent Bi	ab 4	No	20	Ea.		3.350000	67.00	0.00000	0.00	
			_									
				_								
ten/Tgx C	ijo. Taves Consolidate	Set Anval	Date Set	Location	Update Item Ri	nder D	hop Ship	Line Finder	Order Subtotal		3	66.85 USD
Pog	History	Purchase From Histor	y Prepay	ients								
	Qty, On Hand	Gity. On Sales Order	Ry. On Purchase C	nder Ott	. Committed	Qty. Availat	ble 137					

Click the following links for details on each Extended PO Entry feature:

<u>SmartFinder – Purchase Orders</u> Finds purchase orders and shows PO details quickly for any vendor. <u>SmartFinder – Vendors</u> Find a vendor quickly from a name, description, phone number, or address. <u>SmartFinder – Items</u> Find an item quickly from partial item number or description. Search also by manufacturer's item number with the Enterprise version of Productivity Tools.

SmartFinders provide fast, browser-like search capabilities for looking up data on the PO Entry screen. They search more fields than the Finder, and search in all text fields at once. For example, search for "Seattle" if you think that the vendor or contact is in Seattle.

<u>Vendor Inquiry</u> (button left of the vendor name field) provides complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

<u>Vendor Optional Fields</u> Display any vendor optional fields on the Extended PO Entry screen. <u>Quantities Display</u> Show item quantities at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module.

Item Quantities Display quantities available at other locations or in other companies while entering a purchase order.

<u>Update Order</u> Update the expected arrival date or vendor cost of an item, or substitute items on a PO. <u>Drop Ship</u> Drop ship dozens of purchase order detail lines in a single operation.

Line Finder Quickly find a detail line in a large order by item number, location, order number, or vendor item number.

<u>Purchase from History</u> Create a new purchase order for a vendor based on what has been previously purchased from that vendor.

<u>Prepayments</u> View the details of any prepayments entered for the current vendor and purchase order. <u>Quick PJC Entry</u> Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

Note: You may need to widen the Extended PO Entry screen to see all of the Sage 300 and TaiRox Productivity Tools buttons at the bottom of the screen. Click the Maximize button to see all features.



SmartFinder – Purchase Orders

Click the PO Number button to open the SmartFinder for searching purchase orders. PO Number

Search:

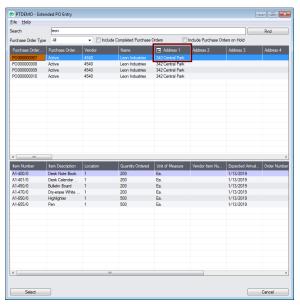
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by purchase order type and include completed and on-hold purchase orders.
- Search returns records which contain the search string in any of the searched fields for example, one record may have "Royal" in the name, where another may have it in the address field. Both 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 PO where "Ross" is in the Vendor Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the POs matching the search criteria. Double-click to select a PO.
- The bottom grid displays the details of the purchase order highlighted in the top grid.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor 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.



SmartFinder – Vendors

Click the Vendor Number button to open the SmartFinder for searching vendors. Vendor Number

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can also filter for Active vendors.
- Search returns vendors and remit-to location records which contain the search string in any of the searched fields – for example, one record may have "Royal" 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:

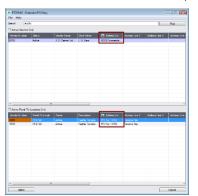
- All of the word fragments must be present in one of the fields being searched. (For example, if you searched for "Ross Blvd", you will not see a vendor where "Ross" is in the Vendor Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the vendors matching the search criteria.
- The bottom grid displays the remit-to locations that match the search criteria.

Note that the remit-to locations *may not* be related to the vendor records displayed in the top part of the screen. The screen below displays remit-to locations for two different vendors.

- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor 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.

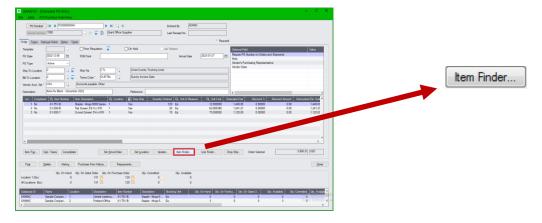


Selection:

- Double-click a vendor in the top grid to select and enter the vendor on the purchase order.
- Double-click a remit-to location in the bottom grid to add the vendor and this remit-to address to the purchase order.

SmartFinder – Items

Click the Item Finder button under the item grid to open the SmartFinder for items.



The Item Finder provides several item search options and displays search results in a selection grid with columns such as description, alternate item number, stock item flag, or sellable flag. You can select which columns are displayed.

SAMLTD - Extended PO Entry				-		×
<u>File</u> Help						
Items Manufacturer's Item Number						
Find Items By						
Search ~	L					
Location 2	Portland C	ffice				
Active Items Only						
E Item Number Description	Status	Comment 1	Structure Code	Category	Stock Ite	m

- The Item Finder appears with the "Search" selected by default on the Items tab. This is the most common way to look up items.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for items.
- Alternatively, select a different "Find Items By" choice from the Find Items By dropdown. For example, you can choose "Show All Records" and specify a range of item numbers, structure codes, categories, or account sets using the range fields. You can specify more selection fields using Additional Criteria.

SAMLTD - Extended PO Entry		– 🗆 X
<u>F</u> ile <u>H</u> elp		
Items Manufacturer's Item Number Find Items By Show All Records		
Item Range Select Items By	From T	o 1-000
Item Number V (None) V	A1-105/0 Q D	1000
(None) ~		
(None) ~		
Additional Criteria		Reset Defaults
Location 2	Portland Office	
TR Item Number Description	Status Comment 1	Structure Code Category Stock Iter

Notes:

 The above search screen displays two tabs for looking up inventory items – Items and Manufacturer's Item Number – which let you search for I/C item numbers or for manufacturer's item numbers.

Search for manufacturer's item numbers is a Productivity Tools <u>Enterprise</u> feature.

The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

- If you do not select the SmartFinder "Search" option, you can select up to four item field ranges by item number, status, structure code, category code, and account set code.
- The item price is the quantity zero price for that customer.
- The Item Finder also displays all columns that are in the standard Sage Finder. You can choose which columns appear in the Item Finder by selecting File > Settings from the Item Finder menu.
- Selecting an item inserts a new row into the PO entry grid.

Searching for Inventory Control Item Numbers on the Items Tab

The Item Finder on the Items tab provides 7 search options:

SAMLTD - Extended PO Entry				-		×
<u>F</u> ile <u>H</u> elp						
Items Manufacturer's Item Number						
Find Items By						
Search 🗸			 			
Show All Records						
L Item Number Description	Portland C)ffice				
Structure Code						
Category						
Account Set Code	Status	Comment 1	Structure Code	Category	Stock Ite	m
Search						_

- Search (most common option) to search for words or word fragments in item text fields (such as the item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the PO Number and Vendor Number SmartFinders.
- Show All Records to select items from all item records based on ranges of Item Number, Structure Code, Category, and Account Set Code and on item Status. You can also specify additional selection criteria to use more item fields.
- Item Number to select items using part of the item number. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

SAMLTD - Extended PO Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Item Number V Starts with V		
tem Range Contains		

Search by Item Number, Description, Structure Code, Category and Account Set Code also let you specify a search value that the item starts with or contains.

Note that the "Search" choice automatically looks in these fields and looks at all characters in text fields.

- **Description** to select items that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- Structure Code to select items with structure codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Category** to select items in categories that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

• Account Set Code – to select items with codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

More on the "Search" option (most common option):

SAMLTD - Extended PO Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Search ~		
Location 2 Portland Office		
Active Items Only		

- Select Find Items by Search. (Note that Find Items By defaults to the last choice used.)
- Enter one or more words or word fragments in the next field to search multiple item tables and fields. (Note that the program scans all columns <u>displayed</u> by the Item Finder.)
- You can filter for Active items only.
- Search returns items and vendor item numbers that contain the search string in any of the searched fields for example, one record may have "Desk" in the Description field, where another may have it in the Comment 1 field. Both items 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:

 If using the Search option, all of the word fragments must be present in one of the fields that are displayed on the screen. (For example, if you search for "desk lamp", you will not see an item where only "desk" is in the Description field and only "lamp" is in the Comment 1 field.)

Display:

- The top grid displays the items matching the search criteria. The screen below shows "Desk Lamp" in the description of one item, and "Desk Lamp" in the comments of the second one so both appeared.
- The bottom grid displays any entered vendor item numbers for the item selected in the top grid.

	ended PO Entry				-	
e <u>H</u> elp						
	rer's item Number					
Find Items By		desk lam				
Search	~	desk lam				
ocation 2		Portland	Office			
Active Items On	h.					
tem Number	Description	Status	Comment 1	Structure Code	Category	Stock Item
A1-103/0	Ruorescent Desk Lamp	Active	Comes with stand and mounting bracket for wall or	STD	A1	Yes
A1-310/0	Halogen Desk Light	Active	Desk lamp with adjustable reflector and arm.	STD	A1	Yes
<						>
endor item Numbe						,
Vendor Item Num	ber VendorType	Vendor N	ame Vendor Cr	ontact	Cost	Unit ^
Find						
				Select		Cancel

Selection:

- Double-click an item in the top grid to select and enter the vendor on the purchase order.
- Double-click a vendor item number to enter the item number and the vendor item number into the PO form.

Selecting columns to display - and scan - in the Item Finder

Choose File > Settings in the Item Finder window to change column settings.

- The current columns that are displayed appear in the right-hand column.
- Highlight columns that you want to add in the left-hand column and click the Include button.

Note:

- **Settings apply to the currently selected tab.** For example, if you want to change the columns on the Manufacturer's Item Number tab, choose the tab first, and then select File > Settings.
- Only the "Included Fields" are used for searching. For example, if you do not include the Comments 1 field, the program will not scan the comments. Also note, that the number of fields will affect performance. If search is slow, remove columns that you don't need.

All of the possible columns are shown below. Note that optional and calculated fields are also available for inclusion – for example Item's Color and Qty. Available for Sale.

SAMLTD - Extended PO Entry	y Settings		×			
Unformatted Item Number	Include ->	Item Number	Up			
Alternate Item Set Number Description Date Last Maintained	<- Exclude	Manufacturer's Item Number Manufacturer's Item Description Oty, Available	Down			
Status Structure Code	All ->	Qty. Available (All) Manufacturer Number				
Category Account Set Code	<- None	Preferred Vendor Item Preferred Vendor				
Stock item Stocking Unit of Measure Default Price List Code Unit Weight Default Picking Sequence Serial Numbers Commodity Number Date Inactive Segment 1 Segment 2						
The maximum number of columns is	50, selected is 8	ОК	Cancel			
Comment 2 Comment 3 Comment 4 Allow tem in Web Store Kiting Item Optional Fields Default RN Number Weight Unit of Measure Unformated Atemate Item N Atemate Item Number Atemate Item Description Costing Method Process Command Weight Conversion Factor Is Item a BOM Component Senial Number Masy to Esrial Days to Espire	Serials Days to Expire Allow Different Serial Qt Serials Optional Fields Default Serial Warrarty Default Serial Contract (Serial is on Warr. When Serial is on Warr. When Serial is on Warr. When Lot Number Mask Not Lot Number Use Lots Days to Expire Lots Days to Expire Lots Days to Expire Lots Days to Expire Lots Days on Quarantin Allow Different Lot Gty Lots Optional Fields Default Lot Contract Co	Code Serial Mask Shuctur Code Serial Mask Shuctur Code Serial Mask Descript Re Unformatted Serial Number Solic Serial Number of Serials to Number of Serials to Number of Serials no Rer Generated Seri Last Generated Seri Last Generated Seri Last Shucture Lot Mask Shucture Lot Mask Description Unformatted Lot Number	n Sold e Finst Generation b Last Generation SIA Preferent Umber Generation Generation Generation Generation Gry, on Pun Gry,	ated Lot d Vendor Type M Number id bhase Order is Order le ted endor Item IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Item Lead Time Manufacturer Manufacturer Number New Item Price Item Procument Item Size Item Volume Warranty Period Oty, On Purchase Order Oty, On Sales Order (Al) E Stocking Unit of Measure Oty, Committed ▼	City. Committed (All) City. Available for Sale City. Available for Sale (All) Base Price (CAD) Pricing Unit

Searching for Items on the Manufacturer's Item Numbers Tab

Note: The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

Search for manufacturer's item numbers is a Productivity Tools <u>Enterprise</u> feature.

SAMLTD - Extended PO Entry				-		×
<u>F</u> ile <u>H</u> elp						
Items Manufacturer's Item Number						
Find Items By						
Search Manufacturer's Item Number						
Manufacturer's Item Description						
Search	Manufacturer's Item Description	Qty. Available	🗳 Qty. Available (All)	Manufacturer I	N Pre	ferrec

- The Manufacturer's Item Number Finder appears with "Search" selected by default. This is the most common way to look up items by manufacturer's item numbers.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for manufacturer's item numbers.
- Alternatively, select "Manufacturer's Item Number" or "Manufacturer's Item Description" for searching.

The Item Finder on the Manufacturer's Item Number tab provides 3 search options:

• **Search** (most common option) – to search for words or word fragments in manufacturer's item text fields (the manufacturer's item number or the manufacturer's item description).

This search works like the PO Number and Vendor Number SmartFinders.

• Manufacturer's Item Number - to select items using part of the manufacturer's item number.

SAMLTD - Extended PO Entry	-	×
<u>File</u> <u>H</u> elp		
tems Manufacturer's tem Number		
Find Items By		
Manufacturer's Item Number V Starts with V		
Starts with		_
Active Items Only Contains		

You can specify that the item number starts with or contains the string that you enter.

• **Manufacturer's Item Description** – to select items using part of the manufacturer's item description. As with the item number, you can specify that the item description starts with or contains the string that you enter.

Note that the "Search" choice automatically looks in the manufacturer's item number and the manufacturer's item description fields.

Vendor Inquiry

Vendor Inquiry button displays the TaiRox Productivity Tools Vendor Inquiry screen – a convenient way to view data related to the vendor. Each tab focuses on an aspect of the vendor's data.

You can also look up details for other vendors while you are on this screen.

PO Number	🖌 🖌	NEW ***	-
Vendor Numbe	er 1580	🔍 🕂 📅 💽 Grant Office S	Supplies
🛃 PTDEMO - '	Vendor Inquiry		- ¤ ×
<u>F</u> ile Settings	<u>H</u> elp		
Vendor No.	◀ 1580	▶ ▶ Q 🖸 Grant Office Supplies	Vendor Currency 👻
		\bullet	
	isitions POs PO	Receipts PO Invoices PO Returns PO CR/DR Purchases Aging	g Items
Profile Address	Comments Option	I Rds. Remit-To Recur. Payables Activity Documents Payment	
Short Name	GRANT]	Start Date 05/09/1995
Legal Name			Last Maintained 08/18/2010
Group Code	INV	Inventory Purchases	Active / /
Account Set	USA	Accounts payable, Other	On Hold
Rate Type	SP		
Bank Code	SEATAC	Seattle Tacoma Bank	
Payment Code	CHECKUSD	USD check Seattle Tacoma Bank	
Check Language			
Delivery Method	Mail		
Tems	DUETBL	Due by Invoice Date	
Retainage Terms			
Retainage %	0.000		
Retention Period			
Tax Group	CALIF	California State Tax Group	
Tax Authority	Authority Descri	Tax Class Class Description Registration Number	Tax Included
STATE	State Tax	1 Taxable item	No
COUNTY	County Tax	1 Taxable merchandise	No
-Vendor Account S			
Outstanding Balan		1,123,641.50 No. of Open Invoices	6
Prepayment Amou	int	0.00 No. of Prepayments	0
Outstanding Retai	nage	0.00	
Credit Limit		1,000.00	
<u>R</u> efresh			Qlose

Vendor Optional Fields

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/P vendor record on the right side of the Extended PO Entry screen.

SAMLTD - Ext <u>F</u> ile <u>H</u> elp P/O	ended PO Entry Purchase Order Entry								- 0	×
PO Number Vendor Number	PO00000015	Q + 🗗	Chloride Systems		Entered By Last Receipt No.	ADMIN				
Order Taxes Opt	ional Fields <u>R</u> ates Totals	1					* Required	I		
Template	Q	From Requisit	ion 👩 🗌	On Hold	Job Related			Optional Field	Value	
PO Date	2020-01-23	FOB Point	Seattle, WA		Anival	Date ···	•	Require PO Number on Receipts Note	Yes Make sure you get the PO #	
PO Type	Standing ~							Vendor's Purchasing Representative Vendor Class	Miscellaneous Expense Purchas	ses
Ship-To Location	1Q 🐻	Ship-Via	CTL	Cross-Country Trucking Lines						

This lets you view notes concerning the account during data entry, and also view PO requirements.

You specify which optional fields to display on the Extended PO Entry screen using the Productivity Tools Options program.

Setting Up Optional Fields on the Extended PO Entry Screen

You choose the vendor optional fields to display on the Extended PO Entry screen and Extended PO Receipt Entry screen using the Productivity Tools Options program on the Sage 300 Desktop.

The following example shows the vendor optional fields that will appear on the Extended PO Entry screen.

SAMLTD - Options	– 🗆 X
<u>F</u> ile <u>H</u> elp	
Menu Item Quantities Order Entry Purchas	se Orders
Receipt Must Have a Purchase Order Numb	ver Vendor Optional Field REQPO
Leave the Vendor Optional Field blank if a Purch Optional Field name to control this option by ven	hase Order Number is required for all vendor receipts. Select a Yes/No Vendor ndors.
Purchase Order/Receipt Vendor Optional Field	ds To Display
Accounts Payable Contact Type	nclude -> Require PO Number on Receipts Up Note
Discount Grace Period	- Exclude Vendor's Purchasing Representative Down
Due Date Grace Period	
SAMLTD - Extended PO Entry	- • ×
<u>File</u> <u>H</u> elp P/O Purchase Order Entry	
PO Number 4 4 PO00000007	Image: Provide and the second seco
Vendor Number 4540	+ 🗟 Leon Industries Last Receipt No. RCP00000001
Order Taxes Optional Fields Rates Totals	* Required
Template C From	m Requisition 🖥 🗍 On Hold 🔄 Job Related Optional Field Value
PO Date 2019-01-08 🛗 FOB Po	oint Arrival Date ··· III Require PO Number on Receipts Yes Note Note that vendor billst
PO Type Active	Vendor's Purchasing Represent Veena Strong
Ship-To Location	a Q Vendor Class Service Provider
Bill-To Location 🔤 🤇 🥫 Terms C	Code • DUETBL Q Due by Invoice Date

Quantities Displayed on the Extended PO Entry screen

Extended PO Entry displays item quantities for the selected location and item at the bottom of the PO Entry window – like the quantities displayed on the Sage Order Entry screen.

The program also provides drill-down links for quantities on sales order, quantities on purchase order, and committed quantities.

Note that the screen below shows the single location displayed for the current line item in the grid, as well as a total for all locations.

You can change the display to include item quantities for multiple locations in multiple companies.

SAMLTD - Extension Eile <u>H</u> elp P/O	ended PO Entry Purchase Order Entry						- 🗆 X
PO Number Vendor Number	PO00000015	Q + 🕞 Q	Chloride Systems	Entered By Last Receipt No.	ADMIN		
Order Taxes Opti	io <u>n</u> al Fields <u>R</u> ates T <u>o</u> tal	s			* Require	d	
Template PO Date PO Type	2020-01-23		On Hold	Job Related	Date 🔹	Note Vendor's Purchasing Representative	Value Yes Make sure you ç
Ship-To Location Bill-To Location Vendor Acct. Set *	1 Q 0 1 Q 0 USA Q 1	Ship-Via CTL Terms Code * N30 Accounts payable, Other	Cross-Cou Q Net 30 D	intry Trucking Lines		Vendor Class	Miscellaneous E
Description	Standing order for Ms. Ada	ms	Reference	Jan 2010 PO			>
Lin Completed	A1-103/0 FI	em Description uorescent Desk Lamp 3W Mini Fluorescent Bulb	Q Location Drop-St 1 No 4 No	ip Quantity Ordered Q Unit of 15 Ea. 20 Ea.	of Measure Q, Unit Cost E 19.990000 3.350000	Discount % Discount % Discount % 299.85 0.00000 0.00000 67.00 0.00000 0.00000	scount Amount 0.00 0.00
<							¥ >
Item/Tax C	alc. Taxes Consolidate	Set <u>A</u> rrival	Date Set Location	Update Item Finder	Drop Ship Line Finder	30	66.85 USD
Po <u>s</u> t D	elete History	Purchase From History	Prepayments				Close
Location 1 (Ea.) All Locations (Ea.)	Qty. On Hand G 137 657	tty. On Sales Order 🛛 Qty. 15 🔮 84 🎴	On Purchase Order 250 🖆 426 🕒	Qty. Committed Qty. Avai 0 4 0 4	lable 137 657		

Displaying Quantities for multiple locations and companies

Extended PO Entry can also display item quantities available at other locations – either at the bottom of the Extended PO Entry screen or in a separate window.

To display quantities for multiple locations and companies:

• Select the **Extended PO Entry > File > Settings** menu choice to change the Item Quantities display settings.

PTDEMO - Extended PO Entry Settings					
Displav Item Quantites	Display on Separate Screen	-			
Save	Do Not Display Display on Entry Screen Display on Separate Screen				

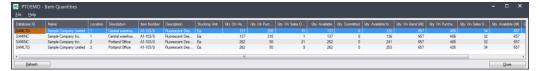
• **Do Not Display** – shows only total quantities and quantities for the current line item location.

Po <u>st</u> Delete	History	Purchase From History	Prepayments]		Close
	Qty. On Hand	Qty. On Sales Order Qty. On	Purchase Order	Qty. Committed	Qty. Available	
Location 2 (Ea.)	262	9 🔛	0 🧧	0 🕒	262	
All Locations (Ea.)	657	23 🕒	276 🛄	0 🛄	657	

• **Display on Entry Screen** – includes a new grid at the bottom of the screen that displays quantities at all locations, in the current company and any associated companies.

	Qty. On Ha	and Qty. On Sales	Order Qty. On Pur	chase Order	Qty. Committed	Qty. Available		
Location (Ea.)		0	0 🔛	0 🔛	0 🧧	C	1	
All Locations (Ea.)	(657	23 🛄	276 🔛	0 🕒	657	,	
Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purc
SAMINC	Sample Compan	1	Central warehou	A1-103/0	Fluorescent Des	Ea.	137	
SAMINC	Sample Compan	2	Portland Office	A1-103/0	Fluorescent Des	Ea.	262	
4		III						•

 Display on Separate Screen – displays the item quantities at all locations in a separate window. (The image below shows the window widened to display most of the quantity columns.)



Click the All Locations button to move the Quantities in front of other windows (if hidden).

The All Locations button appears at the bottom of the Extended PO Entry screen if you choose to display quantities on a separate screen.

Item Quantities will be refreshed as you move to other detail lines.

Selecting which companies and locations are displayed

An administrator must first set up the Sage 300 company databases and locations that are displayed in the Item Quantities grid.

• Go to TaiRox Productivity Tools > Options, and click the Item Quantities tab.

PTDEMO	- Options				-		×
ile <u>H</u> elp							
Menu Item Qu	antities						
Database ID	Description	User ID	Password	Location	Test	Connectior	1
SAMLTD	Sample Company Limited	sa	pass1234	1		ove Up	
SAMINC	Sample Company Inc.	sa	pass1234	1		ove op	
SAMINC	Sample Company Inc.	sa	pass1234	2	Mo	ve Down	
SAMLTD	Sample Company Limited	sa	pass1234	2			
PTDEMO 🖵	Productivity Tools Demo	sa					
CHKVAN							
CPYINC							
CPYLTD							
PTCOPY							
PTDEMO							

• 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.

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 300 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.

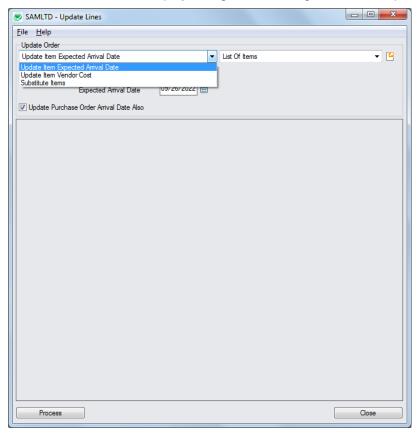
	EMO - Item Qua _{lelp}	antities							- 🗆 ×	\$
Location	Description	Item Number	Qty. On Hand	Qty. On Hand (All)	Qty. On Purchase Order	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale	
	Central warehou	A1-105/0	70	378	80	15	70	0	55	Ε
2	Portland Office	A1-105/0	143	378	0	8	143	0	135	1
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	-
٠			III						÷.	
Ref	fresh								Close	

Updating Purchase Order Lines

The Extended PO Entry Update window lets you update multiple item lines at a time.

Click the Update button to display the Update Lines pop up window. Update...

- The top portion of the form has the same options as the standard Update Purchase Orders form.
- The bottom of the form displays a log of item changes when the update is processed.



Choose what to update – expected item arrival date, item vendor cost, or substitute items:

Update Orde	er			
Update Item	Expected Arrival Date	-	List Of Items 🔹	
Update Item	Expected Arrival Date			
Update Item	Vendor Cost			
Substitute Ite	ems			

You can select three types of updates:

- Update Item Expected Arrival Date
- Update Item Vendor Cost to match new costs in I/C Vendor Details
- Substitute Items

Updating the Item Expected Arrival Date

Update Order		
Update Item Exp	pected Arrival Date	▼ Specific Item ▼
ltem Number	A1-103/0 Expected Arrival Date	Fluorescent Desk Lamp 09/26/2022
Vpdate Purch	nase Order Arrival Date Also	

- Specify the new Expected Arrival Date. The above screenshot shows the date update for a specific item.
- Select "Update Purchase Order Arrival Date Also" to update the Arrival Date for the complete purchase order as well.

Updating the Item Vendor Cost

The program updates the vendor costs on the PO with the costs stored in I/C Vendor Details.

Update Order Update Item Vend	dor Cost	▼ Specific Item ▼
Item Number	A1-103/0	Fluorescent Desk Lamp

- Specify an item number, list of item numbers, or all items.
- The program will update the vendor costs from I/C Vendor Details.

Substituting Items

Note: The program will not substitute items for a completed or partially shipped line, or for lines that have an Order Entry order number reference.

Also, we suggest you <u>take care when substituting non-inventory items</u> due to issues with units of measure and UOM conversion factors with non-inventory items. We suggest you use the stocking units of measure – if both are the same, you will not have an issue. Make sure to check the units of measure and extended costs for all substituted items when processing is finished.

🥑 SAMLTD - Update Lii	nes		
<u>F</u> ile <u>H</u> elp			
Update Order			
Substitute Items		✓ List Of Items	
Retain Existing Line Ite	m Unit Cost		
SAMLTD - Extended	PO Entry		
Q From Item Number A1-103/0	Item Description	Q To Item Number	Item Description
A1-103/0	Fluorescent Desk Lamp	A1-310/0	Halogen Desk Light

- Select Substitute Items from the dropdown list.
- To specify the substitute items list, click the Zoom button beside the dropdown, and add "From" items and "To" items to the list in the form that appears.
 - Use the Finder to look up items. Use the Insert key to add new empty lines.
- Choose whether you want to "Retain Existing Line Item Unit Price."

Choose a single item, list of items, or all items:

If updating the expected arrival date or the vendor cost, you can choose to specify a single item, all items, or a list of items. If you select "Substitute Items, you must use the item list popup to specify the item or items that you want to substitute.

- If you use the list popup form to specify a list of items, the list will be remembered from the previous time you used it to update a PO.
- To create/edit an item list. click on the Drill Down icon on the right side of the dropdown field.

🥏 SAMLTD - Update Lines	
File Help	
Update Order	
Update Item Expected Arrival Date	✓ List Of Items
Expected Aniva	al Date 09/26/2022 🛗
SAMLTD - Extended PO	Entry
Q Item Number	Item Description
A1-105/0	13W Mini Fluorescent Bulb 🗡
A1-105/0	13W Mini Fluorescent Bulb
Import Res	et Defaults Close

To insert items:

- Use the Insert key to add more items to the list.
- Use the Delete key to remove items.
- The list will be remembered from the previous time you used it to update orders.
- o Click the Reset Defaults button to delete all items from the list.

To import a list of items or item substitutions:

- Click the Import button at the bottom of the popup form and select the spreadsheet containing the item list.
 - The imported list will replace the current list of items.
- Use the Insert key to add more rows to the list.
- Use the Delete key to remove items from the imported list.
- o Click the Reset Defaults button to delete all items from the list.

Import format:

You can find sample import files in directory \Sage300\XL61A\Documentation.

Note: The Excel Spreadsheet for an item list (Items.xlsx) is a single column with "ITEMNO" as the column heading in the first row.

	А
1	ITEMNO
2	A11030
3	A11050

Click the Process button to update purchase orders

Click the Process button at the bottom of the screen to update purchase orders. The program will display progress messages as it updates lines and tell you when it is finished.

Extended PO Entry
Are you sure you want to update this purchase order?
Yes No

Depending on your permissions, you may need to have price changes for items approved by a supervisor.

Using the Extended Drop Ship window

The Extended PO Entry Drop Ship window lets you drop ship multiple items at a time.

Click the Drop Ship button to display the Drop Ship pop up window.

- The top portion of the form is the same as the standard Drop Ship form.
- The grid at the bottom displays the Purchase detail lines.

NTDEMO - D File Help	rop Ship					
rile <u>n</u> eip						
Set Drop Shipm	ent Address to	Customer Ship-	To Address		•	
Customer	r Number	1200	Q			
Ship-To Locatio	n	WAREHS	Q			
Description	Warehous	e				
Address	Receiving	Dock 17				
	Wabash In	ndustrial Park				
City	Wabash		State			
Zip/Postal Code	V3W2H2		Count	rv USA		
Phone Number	() -			umber () -		
Location E-mail			Taxin			
Location Emilai						
Contact						
Contact Phone	() ·					
Contact Fax	() -					
Contact E-mail						
Include	Line	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered
No	1	D1-608/B	Double Pedestal 71in X.		Yes	Galanaty oracida
No	2	C1-250/R	Krugg 250 Arm Tilter-Rust		Yes	
No	3	C2-230/G	2300 Series Posture Chai		Yes	
No	4	D2-613/B	Single Pedestal 60in X 3.		Yes	
No	5	F1-265/B	Filing Cabinet - 2 Drawers	1	Yes	
•						
Select All		Select None	Drop Ship			Cancel

To drop ship items:

• Click the Drop Ship button to display the Drop Ship form.



Choose the first drop ship address and items

- Pick a shipment address.
- Double-click the Include column (select "Yes") for each item that you want to drop ship to the selected address.
- Click the Drop Ship button on the form to update the PO entry window with the selected items.

Choose the second drop ship address and items

- Select another shipment address to drop ship other items on the PO to a different location.
- Double-click the Include column (select "Yes") for each item that you want to drop ship to the new address.
- Click the Drop Ship button on the form to update the PO entry window with the selected items.
- Press Cancel when done to return to the main PO entry window.

Using the Line Finder

The Extended PO Entry Line Finder window lets you quickly find any PO detail line in a large order by item number, location, order number, or vendor item number.

Click the Line Finder button to display the Line Finder pop up window.

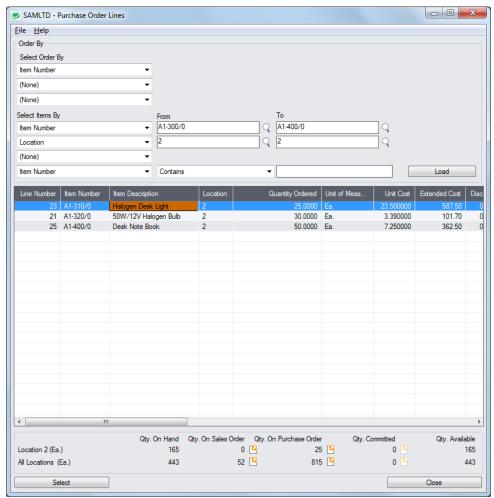
• Choose the order to display PO items in the Line Finder.

You can list items by item number, location, vendor item number, or order number. The example below displays lines by item number.

• Choose the selection criteria for displaying PO items in the Line Finder.

You can select items by item number, location, vendor item number, or order number. The example below selects item lines using a range of item numbers and the location.

- Click the Load button to display the selected lines.
- Double-click the line you want to view, or highlight the line and click the Select button at the bottom of the screen.



Purchasing from History

The Purchase from History window lets you quickly create new purchase orders for a vendor based on previous vendor purchases.

Using Purchase from History also tends to consolidate multiple orders into single, larger orders, resulting in lower shipping costs, increased discounts and other operational efficiencies.

Click the Purchase From History button to display the pop up window. Purchase From History...

SPTDEMO - Extende	ed PO Entry					
File Help						
Purchase Orders Pur	chase History					
Purchase Order Rang	je					
Select Purchase Orde	ers By	From	То			
(None)	•	•			Additio	nal Criteria
(None)	•	•				
(None)		-			Field	Settings
🗳 Purchase Order N	lumber Purchase Ord	ler D Bill-To Locat	ion Ship-To Location	Description	Reference	
Row Include	Include Comments	Include Instructions	🖪 Item Number	Item Description	Location Order UOM	Quantity Ordered
•			III			
	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Availab	le
Location	0	0	C C C			0
All Locations	0	0	E 0 E	0		0
Load	Select All	Select None	Purchase			Close

- The Purchase Orders tab lets you apply selection criteria and then press the Load button to request previous purchase orders.
- The Purchase History tab is similar, but lets you select using item criteria rather than order criteria.

To create a new PO from prior ones using the Purchase Orders tab

 Use the Purchase Order range fields to select past POs for the vendor, and then click the Load button. In this case, we've chosen purchase orders since January 1, 2019. (You can add or remove fields from the range field dropdown lists using the <u>Field Settings</u> button – see below.)

Purchase Order Range						
Select Purchase Orders By	Fror	n	То			
Purchase Order Date		/01/2019	12/31/9999		Additiona	al Criteria
(None)	•					
(None)	•				Field S	ettings
	• ,	Dill To Location	Ship To Loostian	Description		ettings
Purchase Order Number	Purchase Order D	Bill-To Location	Ship-To Location	Description	Field S	ettings
Purchase Order Number	• ,	Bill-To Location	Ship-To Location	Description		ettings
Purchase Order Number PO000000010	Purchase Order D	Bill-To Location	Ship-To Location	Description		ettings
	Purchase Order D 1/8/2019	Bill-To Location	Ship-To Location	Description		ettings

• Click the purchase orders lines to see the PO details in the bottom grid.

- Click the Select All and Select None buttons to include all or none of the items in the previous purchase order.
- Double-click the Include column to select individual lines (the Include column displays Yes).

Line Num	Include	Include Comments	Include Instructions	🗳 Item Number	Item Description	Location	Order UOM	Quantity Or
1	Yes	No	No	A1-400/0	Desk Note Book	4	Ea.	
2	No	No	No	A1-401/0	Desk Calendar	4	Ea.	
	Yes	No	No	A1-450/0	Bulletin Board	4	Ea.	
4	No	No	No	A1-470/0	Dry-erase White	4	Ea.	
5	No	No	No	A1-650/0	Highlighter	4	Fa	-
<			111			_		F

• Edit the **Qty. Ordered** column to change the quantities for the new purchase order that you are creating. (The Quantity Ordered field shows the quantities from the previous PO.)

Include Comments	Include Instructions	🛛 Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty. Ordered	^
No	No	A1-400/0	Desk Note Book	4	Ea.	200	0	=
No	No	A1-401/0	Desk Calendar	4	Ea.	200	0	=
No	Yes	A1-450/0	Bulletin Board	4	Ea.	200	15	
No	No	A1-470/0	Dry-erase White	4	Ea.	200	0	
No	No	A1-650/0	Highlighter	4	Fa	500		T
•							•	

- When you have finished the edits for items from this purchase order, click the Purchase button to add the items to the new PO.
- Select another purchase order from the top grid, choose the items that you want to order, enter the new quantities, and again click Purchase.
- Click the Close button when you have finished adding items from prior POs.

Use the "Field Settings" button to customize the list of fields for selecting POs:

Click the **Field Settings** button to change the fields that appear in the "Select Purchase Orders By" dropdown lists on the Purchase From History screen.

PTDEMO - Extended PO Entry				
File Help				
Purchase Orders Purchase History				
PTDEMO - Extended PO Er	ntry Field Settings		×	
ShpMa Tems Code Expected Arival Date Bill-To Location Purchase Order Type Completed On Hold Tax Group Entered By	Include -> <- Exclude	Purchase Order Number Purchase Order Date Vendor Ship-To Location	Up Down	Additional Criteria Field Settings eference Order UOM Quantity Orderec
ОК			Cancel	Box 10

- The list of fields on the right are the fields that will appear in the Select Purchase Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

Using the Purchase History tab

The Purchase History tab allows a similar sequence of operations – selection, editing of quantities and copying to the purchase order.

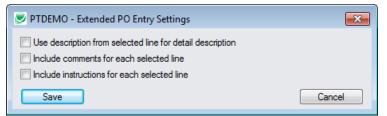
urchase tem Ra	Orders Purchase	HISTORY							_
	nge Items By		_		То				
tem Nu			From A1-400/0			777777777777777777	ZZZZ O	Additional Criter	ia
(None)				4				Additional Criter	ia
		•							
(None)		•							
nclude	E Item Number	Item Description	Invoice Number	Transactio	Location	Unit of Measure	Total Quantity	Qty. Orde	
lo	A1-401/0	Desk Calendar	IN158115	5/5/2020	1	Fa	10	0	
lo	A1-401/0	Desk Calendar	IN158125	5/10/2020	1	Ea.	12	0	
lo	A1-401/0	Desk Calendar	IN158135	6/23/2020	1	Ea.	12	0	
					Dardana		0		
ontine	1 (Ea.)	Qty. On Hand Qty 184	7. On Sales Order Gt) 0 🍳	. On Purchase	200 🎴	Qty. Committed	Gty.	Available 184	
	ions (Ea.)	579	0 🕒		200 <u>-</u> 800 <u>-</u>			579	

- Select the range of item numbers, invoices, or transaction dates that you want to use as search criteria, then click the Load button.
- See the steps listed above for including items from history on the new purchase order.

Setting default descriptions, comments and instructions for included items

You can select the default settings for taking descriptions, comments and instructions from the original purchase orders. You can also change the settings for each item as you select them.

• Select File > Settings from the Purchase From History screen.



• Select the checkboxes if you want them to be included by default from the original purchase orders.

Viewing Prepayments

The Prepayments window lets you quickly view any prepayments entered for the current vendor and purchase order.

Click the Prepayments button to display the pop up window.

In the following example, the program displays a single prepayment that was entered in A/P and assigned to PO number "45" for Grant Office Supplies.

Prepayments...

SAMLTD - Ext	ended PO Entry							– 🗆 🗙
File Help P/O	Purchase Order Entry							
PO Number	∢ ♦ PO00000045	► ► <		Entered By	ADMIN			
Vendor Numbe	1580	Q + 🐻 💽 Grant Office Si	upplies	Last Receipt No.				
					• P.	equired		
Ord <u>e</u> r Ta <u>x</u> es Opt	tional Fields Rates Totals	Prepayments				equired	- 🗆 X	
Template	Q □	Prepayments						Value
PO Date	2022-12-06 🛗 FO	E Vendor Number	1580	Grant Office	Supplies			
PO Type	Active ~	Purchase Order Number	PO00000045					
Ship-To Location	2 Q 🔂 Shi	e					Load	
Bill-To Location	2 🔍 🔂 Ter	Description Payment Date	e Posting Date Vendor urren	ncy Code Vendor R	emit-To Location Vendor / I	Payee Name Payment Amount	Amount Remaining 🛛 Ba	
Vendor Acct. Set *	USA Q Accou	PO00000045 2022-05-10	2022-12-05 USD		Grant Offic	ce Supplies 5,000.00	5,000.00 60	
Description	Items for Black - December 2022	2						>
Lin Complete	d Q Item Number Item De							Discounted Ext. Cost
1 No	A1-751/B Stapler							1,440.00
2 No 3 No	S1-200/B Flat Sci S1-300/Y Curved							1,241.21 1,125.00
		<					>	
<						Total	5,000.00	, ×
						Amount Remaining	5,000.00	
Item/Tax C	Calc. Taxes Consolidate						Llose	3,806.21 USD
Post	Delete History Purc	hase From History Prepay	ments					Close
	Qtv. On Hand Qtv. Or	n Sales Order Qty. On Purchase C						
Location 1 (Ea.)	uty. Un Hand Uty. Ur 0		Order Qty. Committed	Qty. Availa	0			
All Locations (Ea.)	3		120 📔 0 📱		3			
Database ID	Name Location	Description Item N	Jumber Description	Stocking Unit	Qty. On Hand Qty. 0	On Purcha Qty. On Sales O	. Qty. Available Qty	. Committed Qty. Availabl
SAMINC	Sample Compan 1	Central warehou A1-75	1/B Stapler - Kings-5	Ea.	0	0 0	0 0	0
SAMINC	Sample Compan 2	Portland Office A1-75	1/B Stapler - Kings-5	Ea.	3	0 0) 3	0 ~
<								>

The "Amount Remaining" indicates the amount of the prepayment that has not been applied to an invoice with a matching purchase order number.

Quick PJC Entry

To speed up data entry, Extended PO Entry will default inserted lines to the previous entry's selections for Contract, Project and Category when multiple lines use the same selections.

The following form shows how the order form appears immediately after pressing the Insert key to create the second line (with default values for the Contract, Project, Category and Cost Class fields):

SAMLTD - Extended PO Entry <u>F</u> ile <u>H</u> elp P/O Purchase Order Entry				- ¤ ×
PO Number 4 (*** NEW *** Vendor Number) 1580 Q + 6	Image: Constraint of the second se	Entered By Last Receipt No.		
Order Taxes Optional Fields Rates Totals			* Required	
Template Image: From Requisit PO Date 12/06/2022 EVERT From Requisit PO Type Active	tion 🕞 🔄 On Hold	✓ Job Related Arrival Date	Optional Field Vendor Class Note Disc Level	Value Descript Miscellaneous Expense Purchases Miscella Discount onn goods - not labour 20%.
Ship-To Location Q D Ship-Via Bill-To Location Q D Terms Code *	DUETBL Q Due by Invoice Da	ate		
Vendor Acct. Set * USA Q Accounts payable,	Other			
Description	Reference			
Completed Q Contract Q Project	Q, Category Cost Class	Q Item Number Item Description	Q Location Drop-Ship Quantity C)rdered 🔍 Unit of Measure 🛛 🔍 Unit C
No 120-1200-10 1012	UPGRLABOR Labor		1 No	10 HOUR 5.2090
No 120-1200-10 1012	UPGRLABOR Labor		No	0.0000
K				E.
tem/Tax Calc. Taxes Consolidate	Set Arrival Date Set Location	Update Item Finder Drop St	Dip Line Finder Order Subtotal	52.09 USD
Post Delete History Purchase From H	istory Prepayments			Qose
Qty. On Hand Qty. On Sales Order				
Location 0 0		0 🦰 0		
All Locations 0 0	0	0 🦰 🛛 0		