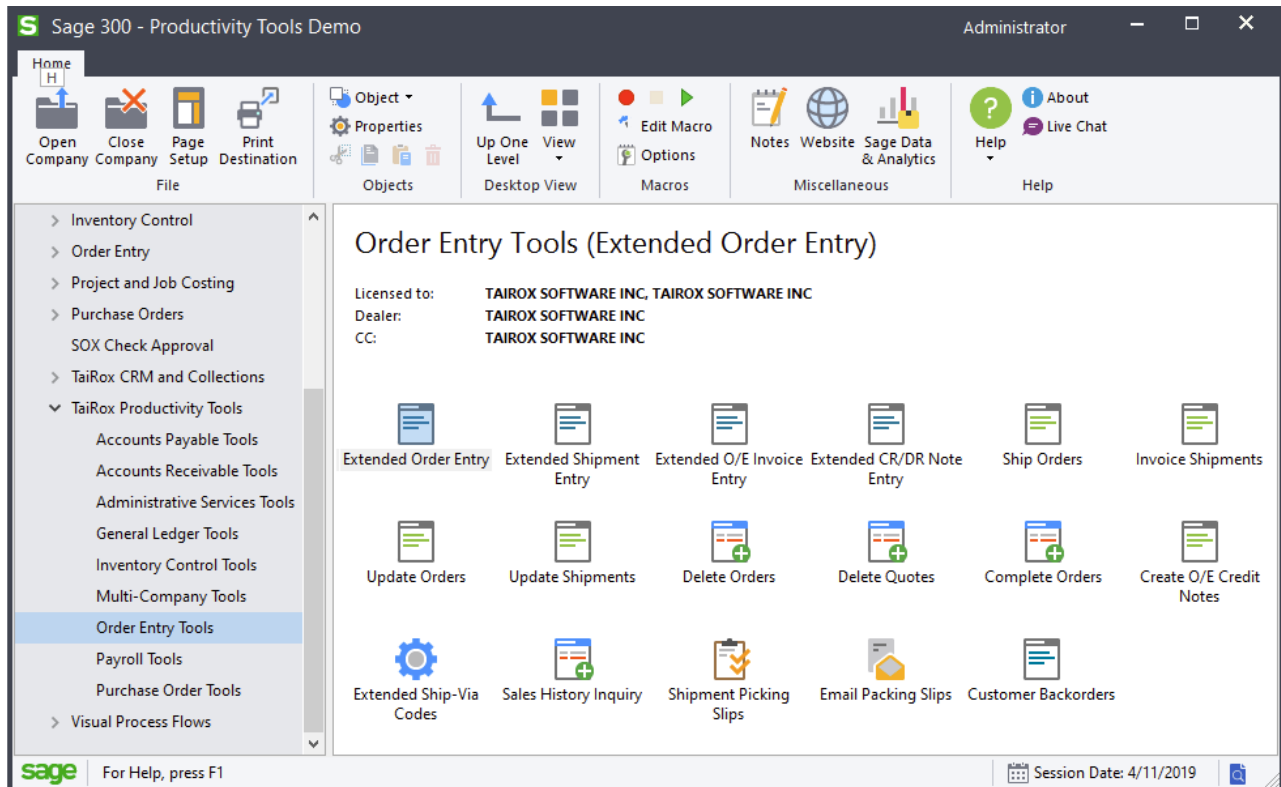# TaiRox Productivity Tools for Sage 300

Productivity Tools is available for $2395 + $600 per year. Productivity Tools Enterprise adds enterprise features* and is available for $2795 + $700 per year. Add hundreds of features to Sage 300. Add dozens of enhancements to the order entry screen. Manage accounts, customers, vendors, and items across multiple companies. Update hundreds of orders or POs in one step. Search for customers, vendors and items using an internet-like search engine* ... and much more.

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 a Productivity Tools Overview: https://vimeo.com/605874510

https://www.tairox.com/

TaiRox Productivity Tools for Sage 300

Administrative Services Tools

Streamline administrative security tasks.

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

Watch: https://vimeo.com/805656328

Application Security* tells you the security permissions required to run a program on the desktop.

Watch: https://vimeo.com/801057796

General Ledger Tools

Manage large or multi-company charts of account.

Extended G/L Accounts copies accounts from one company to many. There are segment substitution, multi-currency and insert/update options. Copying is done safely with all changes and exceptions logged. 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.

Copy G/L Accounts* manages multi-company ledgers with segment filtering and substitution rules. Watch: https://vimeo.com/707083999

Copy G/L Accounts Setup*Specify any number of account ranges from a template company to target companies. For each account range: specify any number of segment filtering rules and any number of segment substitution rules. For all account ranges: specify any number of excluded account ranges.
Look Up G/L Account* finds the right account quickly when thousands are in use.
Watch: https://vimeo.com/789777545

Tag Posted G/L Transactions* cost or categorize posted G/L transactions.
Watch: https://vimeo.com/1027398930

TaiRox Productivity Tools for Sage 300

Accounts Receivable Tools

Streamline single and multi-company accounts receivable processes.

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 payment documents to invoices. A payment grid and matching invoice grid maximize visibility. Supports manual and auto-apply operations. Automated matches can be ordered by Document Number, Document Date or Due Date. 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

Create A/R Credit Notes lets you quickly reverse accounts receivable invoices, debit notes, or interest payments that were applied to customer accounts.

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.

Update Customers updates a salesperson code for multiple customers in one step, and more.

Create Price List* creates a price list spreadsheet for a single customer that incorporates all pricing factors, including contract pricing, so that the prices match order entry defaults. Watch: https://vimeo.com/800959649

* SmartFinder searches like an internet search engine.

TaiRox Productivity Tools for Sage 300

Accounts Payable Tools

Manage payables from a single program, Vendor Inquiry.

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 a vendor, including grids for purchase orders, requisitions, invoices, receipts, returns, payments, adjustments, credit notes and more. 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.

Check Mailing Labels prints addresses from Payment Batches on envelopes or mailing label sheets.

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.

TaiRox Productivity Tools for Sage 300

Inventory Control Tools

Streamline single and multi-company inventory processes.

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.

Remove Items from Price Lists* lets you quickly remove multiple items from multiple price lists in a single operation. Watch: https://vimeo.com/844642223

* SmartFinder searches like an internet search engine.

TaiRox Productivity Tools for Sage 300

Order Entry Tools, part 1 of 2

Streamline order and shipment processing when more data is at hand.

Extended Order Entry* shows prices, quantities, and comments in a finder. Shows margins, most recent costs, and UOM totals. 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. Displays customer optional fields on the entry form. Shows prepayments related to the order. Force a purchase order number to be entered for selected customers. Check if a customer purchase order number is used on more than one order. Watch: https://vimeo.com/605974010

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 customer optional fields on the entry form. Displays quantities available at other locations or companies. Shows prepayments related to the shipment. Check if a customer purchase order number is used on more than one shipment. Watch: https://vimeo.com/771234785

* SmartFinder searches like an internet search engine.

TaiRox Productivity Tools for Sage 300

Order Entry Tools, part 2 of 2

Streamline order and shipment processing when more data is at hand.

Extended O/E Invoice Entry* shows prices, quantities and comments when selecting items. Shows margins, most recent costs, and UOM totals. Prints picking slips, invoices, quotes & confirmations. Displays customer optional fields on the entry form. Shows prepayments related to the invoice.

Create O/E Credit Notes lets you quickly reverse order entry invoices that were applied to customer accounts. https://vimeo.com/698767145

Extended Ship-Via Codes copies ship-via codes from one company to many and provides links to Google Maps and email clients. Provides a field to store tracking number URLs.

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 substitutes items, kits and BOMs on hundreds of orders. Updates prices, expected ship dates, deliver by dates, customer addresses, salesperson codes and more. 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.

Email Packing Slips will send an email to a customer, reporting which items on an order were shipped. Supports customer, ship-to and entered email addresses and ship-to tracking numbers. Watch: https://vimeo.com/664376177

Customer Backorders lets you quickly find all outstanding backordered items for a customer. The program can be launched from the desktop or from Extended Order Entry. Drilldown is supported.

TaiRox Productivity Tools for Sage 300

Purchase Order Tools

Streamline PO and receipt processing when more data is at hand.

Extended PO Entry* Sort detail lines to speed up editing of very large purchase orders. Create a new purchase order by selecting details from previous purchase orders. Display quantities available at other locations. See prepayments assigned to a purchase order. 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 substitutes items on hundreds of orders. Updates vendor costs and expected arrival dates on multiple POs in one step.

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

Streamline timecard processing.

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.