

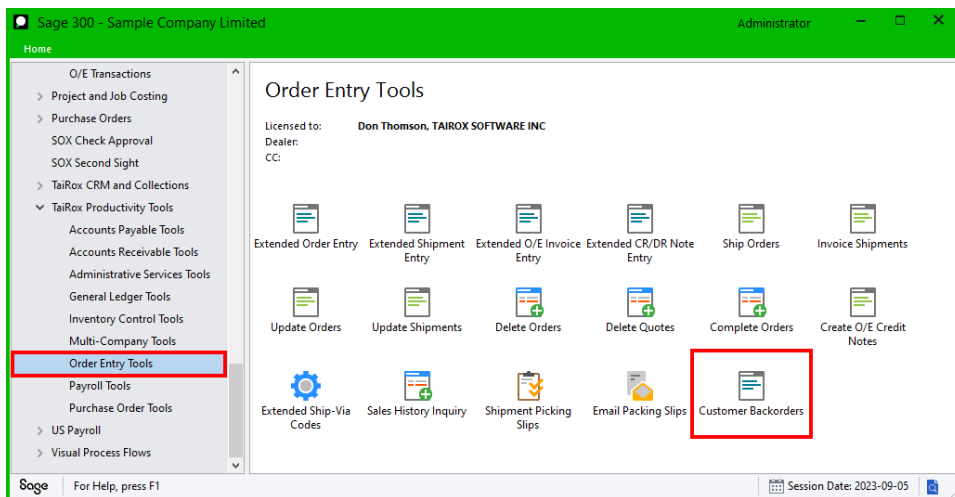
Customer Backorders

TaiRox Customer Backorders lets you quickly find all outstanding backordered items for a customer – on multiple orders.

The program lets you select search orders by a range of order dates, and provides a SmartFinder for quickly looking up customer numbers.

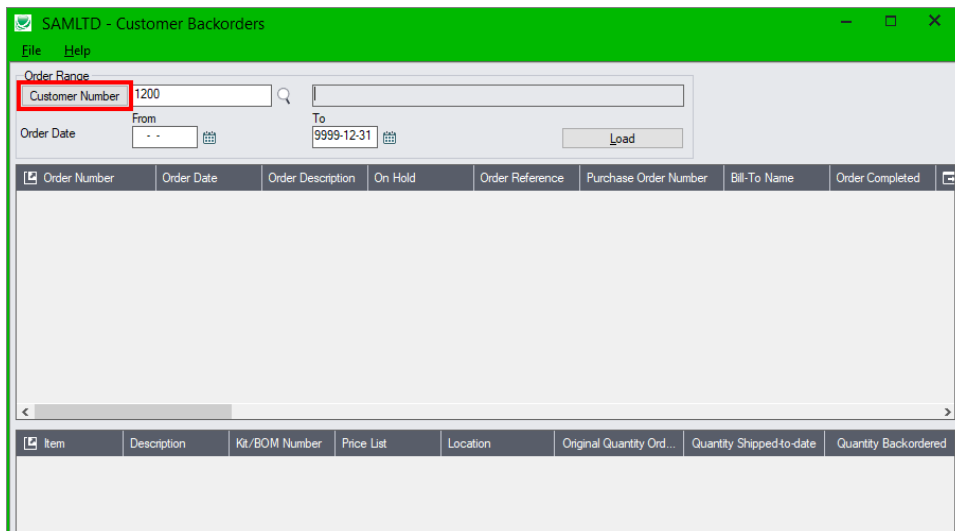
Running Customer Backorders

The Customer Backorders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.



The Customer Backorders screen (below) lets you search for customer orders with backordered items by specifying the customer number and a range of order dates.

Click the Customer Number button (outlined in red, below) to display the SmartFinder for looking up customers. (The program displays the previously used customer number.)



Looking Up Orders with Backordered Items

To look up orders with backordered items:

- Enter the customer number.
Note that the program defaults to the customer number from the last backorder lookup.
 - Click the Customer Number button to look up the customer number with the SmartFinder. (See below.)
- Specify the range of order dates that you want to search.
- Click the Load button to display any orders for the customer with backordered items.

The program displays all orders with backordered items for the customer within the range of order dates.

Order Number	Order Date	Order Description	On Hold	Order Reference	Purchase Order Number	Bill-To Name	Order Completed
ORD0000000000087	2023-07-14	August 2023 Or	No		2023-0004831	Mr. Ronald Black	Incomplete/Not

Item	Description	Kit/BOM Number	Price List	Location	Original Quantity Ord.	Quantity Shipped-to-date	Quantity Backordered
A1-800/0	Wastebasket		USA	1	10	9	
C1-250/R	Kuugg 250 Am ...		USA	1	6	5	1
ROFFICE SPL KIT	Office Supplies ...	2	USA	1	6	5	1

- Highlight an order in the top grid to view the backordered item details in the bottom grid.
- Double-click the order number – or click the Order Number column heading – to drill down to the order using the Extended Order Entry program.
- Double-click the item number in the bottom grid – or click the Item column heading – to drill down to the item details using the Extended Inventory Items program.

Using the SmartFinder to Look Up Customer Numbers

SAMLTD - Customer Backorders

File Help

Search: Find

☐ Active Customers Only

Customer Number	Status	Customer Name	Short Name	Address Line 1	City	State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles	CA
1400	Active	Coastal Electric Company	COAST	586 Tanner Road	Toronto	Ontario
1970	Active	Mr. Ronald English	ENGLI	2375 Hudson Avenue	Fairbanks	AK
7200	Active	CanAm Industries	CANAM	1898 King George Street	Toronto	Ontario

☐ Active Ship-To Locations Only

Customer Number	Ship-To Location	Status	Description	Address Lin...	Address Line 2	Address Line 3	Address Line 4
1400	ALHAMB	Active	Alhambra Busine...	Happy Valley To...			

Select Cancel

To look up account numbers for customers:

- Click the Customer Number button to open the SmartFinder for looking up customer account numbers.
- Enter part of a name or address (or contact phone or email address) and click the Find button.

SAMLTD - Customer Backorders

File Help

Search: Find

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Customer Number	Status	Customer Name	Short Name	Address Line 1	City	State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles	CA
1400	Active	Coastal Electric Company	COAST	586 Tanner Road	Toronto	Ontario
1970	Active	Mr. Ronald English	ENGLI	2375 Hudson Avenue	Fairbanks	AK
7200	Active	CanAm Industries	CANAM	1898 King George Street	Toronto	Ontario

In this example:

- We entered “ron” in the Search field and pressed the Enter key to search for Ronald Black.
- The program got 4 results, 2 with “**Ronald**” in the Customer Number field, and 2 with “**Toronto**” in the city field.
- You can add to the search string – in this case by adding “bl” to narrow down the search.

SAMLTD - Customer Backorders

File Help

Search: Find

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Customer Number	Status	Customer Name	Short Name	Address Line 1	City	State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles	CA

- Double-click the customer to select it and return to the Customer Backorders form.

Additional Notes about the Customer Number SmartFinder

- 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 “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 customer where “Ross” is in the Customer Name field and “Blvd” is in the Address 1 field.)
 - Addresses (e.g. the Bill-To addresses) are treated as a single field.
- You can filter to retrieve active customers only and active ship-to locations only.

Display:

- The top grid displays the customers matching the search criteria. Double-click to select a customer.
- 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. Ship-to locations appear *only* if they contain the search string.

- Click the Address column heading or double-click the address to launch **Google Maps** with the address. You can also check the locations of ship-to addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.

Customer Number	Status	Customer Name	Short Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
1200	Active	ACME Plumbing	ACME	527 Warehouse			

Customer Number	Ship-To Location	Status	Description	Address Line 1	Address Line 2	Address Line 3	Address Line 4
1210	A	Active	Receiving Dock A	ACME Receiving	527 Warehouse		
1210	B	Active	Receiving Dock B	ACME Receiving	527 Warehouse		
1210	C	Active	Receiving Dock C	ACME Receiving	527 Warehouse		