

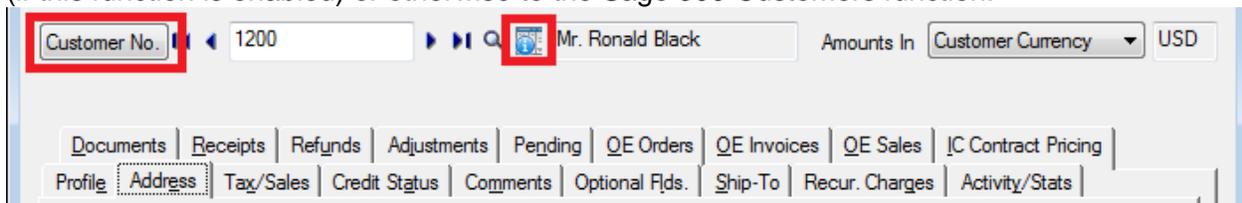
TaiRox Productivity Tools User Guide

Extended Customer Inquiry - Overview

Extended Customer Inquiry provides a convenient way to view data related to a Sage 300 customer. Each tab focuses on an aspect of the customer's data. Extended Customer Inquiry enhances the Sage 300 Customer Inquiry function by:

- A SmartFinder will search for customers like an internet search engine
- Google Maps, Email and Website integration is provided from the Address tab
- Drill-down will launch the TaiRox Extended Customers UI form
- Multiple contacts per customer are shown in the Address tab

The Customer No button provides access to a search function - SmartFinder - that will search multiple columns in both customer and ship-to locations and display all matches - just like a modern search engine. The zoom icon provides access to either TaiRox Extended Customers (if this function is enabled) or otherwise to the Sage 300 Customers function.



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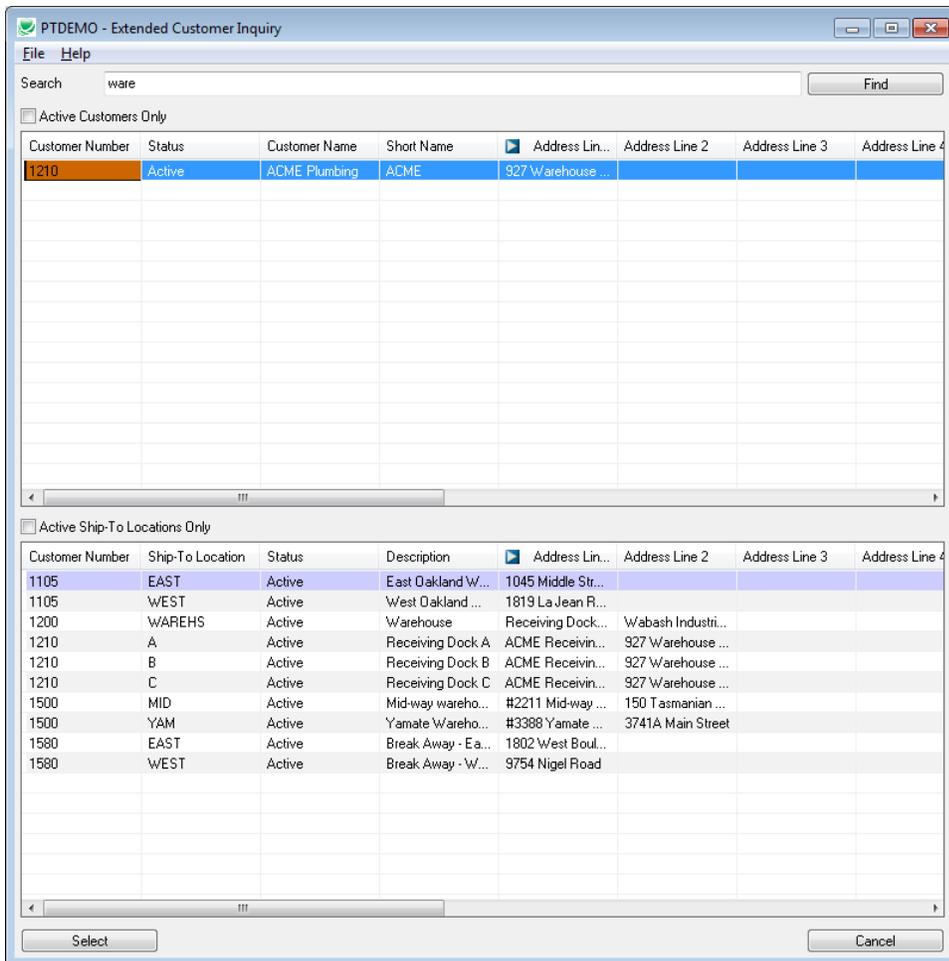
Extended Customer Inquiry - SmartFinder

The SmartFinder form pops-up. Suppose you remember that this customer has something to do with a warehouse. Enter "ware" and click on the Find button. A/R customer rows are shown in the top grid and A/R shipment locations are shown on the bottom grid. You can see that many columns in the database tables are searched simultaneously.

Select a row in the customer grid or ship-to grid and that customer will be selected and you will be returned to the main entry form.

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 entries "(451) 555-8991" as well as "(408) 451-8991".



Google Maps is launched with the selected address when you click on the right-arrow icon:



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Extended Customer Inquiry - Address

The Address tab show multiple contacts per Customer. The Address1, E-mail, Web Site and Contact Email will launch Google Maps, email clients and browsers. A right-arrow icon in the multiple contacts grid will launch an email client.

PTDEMO - Extended Customer Inquiry

File Help A/R Customer Inquiry

Customer No. 1200 Mr. Ronald Black Amounts In Customer Currency USD

Documents Receipts Refunds Adjustments Pending QE Orders QE Invoices QE Sales IC Contract Pricing

Profile Address Tax/Sales Credit Status Comments Optional Flds. Ship-To Recur. Charges Activity/Stats

Address 1 2820 Wabash Road

Address 2

Address 3

Address 4

City Los Angeles

State/Prov. CA

Zip/Postal Code 90048

Country USA

Telephone (213) 555-0274

Fax (213) 555-7234

E-mail

Web Site

Contact Mr. Black

Contact Phone () -

Contact Fax () -

Contact E-mail ronaldblack99@hotmail.com

Last Name	First Name	Title	Position	Phone (Mobile)	Phone (Office)	Phone (Other)
Black	Donna	Ms	VP Sales	(604) 629-0223 ...	(604) 805-1871 ...	() -
White	Barry	Mr	VP Development	(604) 629-1871 ...	() -	() -

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