Extended Customer Inquiry

Extended Customer Inquiry provides a convenient way to view all the data related to a Sage 300 customer. Each tab focuses on one aspect of the customer's data.

Extended Customer Inquiry enhances the Sage 300 Customer Inquiry function by letting you:

- Use a customer SmartFinder for browser-like customer lookups.
- View multiple contacts per customer that were added with the TaiRox Extended Customers form.
- Click the Address button to display customer addresses in Google maps.
- Click the E-mail button to create new emails for customer and contact email addresses.
- Click the Web Site button to display customer web sites in a browser.
- Display receipts entered against a customer invoice and applied to the national account member
- Drill-down to the TaiRox Extended Customers UI form

The following screen displays all 20 Extended Customer Inquiry tabs. Some tabs may not appear on your screen, depending on your user permissions and which Sage 300 applications your company uses.

The Customer No. button provides access to a "SmartFinder" search function that searches multiple columns in both customer and ship-to locations and displays all matches – like a modern bowser search engine.

Similar buttons appear on the Address tab.

PTDEMO - A/I	R Customer Inq						×
File Settings H	lelp						
Customer No. 14 4	1100) • • • • •	Bargain Mart - San Diego	Amounts In C	Customer Currency	/ • U	SD
National Account	BARMART] [Bargain Mart Stores, Inc.				
Documents Rece	ipts Refyrnds Adg	ustments Pendi	ing <u>Q</u> E Orders <u>Q</u> E Invo	ices <u>Q</u> E Sales	C Contract Pricin	9	
Profile Address Ta	ss/Sales Credit Stal	tus Comments	Optional Fids. Ship-To	Recur. Charges	Activity/Stats		_
Short Name	BMT-SD			Start Date	01/01/2009		
Group Code	WHL	Wholesale Sale	s Group	Last Maintained	08/13/2018		
Account Set	USA	Accounts Recei	ivable. Other	Inactive	11		
Rate Type	SP			On Hold			
Territory	CA	Account Type	Open Item	Allow Web St	tore Shopping		
Price List	WHS	Customer Type	Base	Allow Partial	Shipments		
FOB Point				Allow Backor	der Quantities		
Inventory Location				Print Stateme	nta		
Ship Via							
Payment Code	CHECK	Check					
Check Language	ENG	Check for Duplic	cate POs None				
Delivery Method	Mai						
Billing Cycle	BILLMT	Monthly Billing C	(yole				
Interest Profile	INTWHS	Interest Profile -	Wholesale				
Terms Code	N30	Net 30 Days					
Retainage Terms							
Retainage %	0.00000						
Retention Period	0	Days					
Refresh						Qos	•

Sage A/R Customer Inquiry screen

File Help A/R	tended Custom Customer Inquiry	er Inquiry				-	n x
Customer No. 4 4 National Account	1100 BARMART	► H Q 😐	Bargain Matt - San Bargain Matt Store	Diego 18, Inc.	Amounts In	Customer Currenc	ay ♥ USD
Documents Rece Profile Address Ta	ipts Refynds Adg ag/Sales Credit Stal	ustments Pendi tus Comments	ng <u>Q</u> E Ordens Optional Fjds.	QE Invois Ship-To	Recur. Charges	IC Contract Price Activity/State	ng
Short Name Group Code Account Set	WHL USA	Wholesale Sale Accounts Recei	s Group vable, Other		Start Date Last Maintained	08/13/2018	
Rate Type Territory	SP CA	Account Type	Open Item		On Hold	itore Shopping	
Price List FOB Point	WHS	Customer Type	Base		Allow Partial Allow Backo Allow Backo Dect Statem	Shipments rder Quantities	
Ship Via Payment Code	СНЕСК	Check			- THE SERVICE	51 K-0	
Check Language Delivery Method	ENG Mai	Check for Duplic	ate POs None				
Billing Cycle Interest Profile Terms Code	INTWHS N30	Interest Profile - Net 30 Days	Wholesale				
Retainage Terms Retainage %	0.00000						
Retention Period	0	Days					
Refresh							Qose

TaiRox Extended Customer Inquiry screen

Using Extended Customer Inquiry

The Extended Customer Inquiry icon appears under **TaiRox Productivity Tools > Accounts Receivable Tools** on the Sage 300 desktop and can be copied to other menu locations.

Sage 300 - Sample Company	iy Lim	ited								Administrator	-	□ ×
Home												
 TaiRox Productivity Tools Accounts Payable Tools 	^	Accounts F	Receivable To	ols (Extend	ed Customer	Inquiry)						
Accounts Receivable Tools Administrative Services Tools	s	Licensed to: Dealer: CC:	Don Thomson, TAIROX S	SOFTWARE INC								
Inventory Control Tools Multi-Company Tools							F			Enterprise Tools)
Payroll Tools Purchase Order Tools	~	Extended Customers	Extended Customer Inquiry	Extended Ship-To Locations	Extended AR Receipt Entry	Apply Documents	Mass Billing	Create A/R Credit Notes	Mail Merge	Create Price List	Update Cus	stomers
Soge For Help, press F1										E Session D	ate: 2023-09	-07 🔯

Note that Enterprise Productivity Tools appear only if you have an Enterprise license from TaiRox Software.

Control which tabs appear

You can control which tabs appear on the Extended Customer Inquiry screen.

• Click on A/R Customer Inquiry > Settings > Tabs.

PTDEMO - Exte <u>F</u> ile <u>H</u> elp A/R C	ended Customer Inquiry ustomer Inquiry		- □ ×
File 🔸	🔟 🕨 🕨 🛛 🖸 🛛 🚺	Mart - San Diego Amounts In	Customer Currency 👻 USD
Settings 🔸	Tabs	lart Stores, Inc.	
Help <u>pocamenas necen</u> Profil <u>e</u> Address Ta	Save Settings As Defaults Clear Saved Settings	Orders <u>Q</u> E Invoices <u>Q</u> E Sales al Flds. <u>S</u> hip-To Recur. Charge	IC Contract Pricing s Activity/Stats

• Select tabs using the following form. The example below shows that all tabs will be displayed.

🛃 Tabs	×
Available tabs: Visible tabs: Include -> Address Ceck Status Comments Address Ceck Status Comments Address Comments Recur, Charges Achily/Stats Documents Receipts Recurds Adjustments Pending OE Orders DE Orders DE Orders DE Sales IC Contract Pricing	Close

Control the default tab, document selection settings, and currency choice

You can also control which tab is selected by default when you open the Extended Customer Inquiry screen, which settings are used for data selection on each tab, and whether amounts are displayed in Customer Currency or Functional currency (in multicurrency systems).

- Choose the default settings you want for each tab in A/R Customer Inquiry and choose which current you want to display by default.
- Click on the tab that you want to display when the window opens.

File	> h0						
	10	🕨 🕨 🖓 📔 Bargain	Mart - San	Diego	Amounts In	Functional Currency	- ⊂/
Settings	•	Tabs	lart Stores	, Inc.		Customer Currency	U
Help		Save Settings As Defaults	nal F <u>i</u> ds.	<u>S</u> hip-To	Recur. Char	ges Activity/Stats	
Documents Receip	ots	Clear Saved Settings	ders <u>O</u> B	Invoices	<u>O</u> E Sales	IC Contract Pricing	
Document Type	_		_		_		

• Click on A/R Customer Inquiry > Settings > Save Settings as Defaults.

In the above example, amounts will appear in functional currency and the Documents tab will be displayed first by default – using the Document Type settings that appear above.

Look up Customers with the SmartFinder

Click the Customer No. button at the top of the form to open the SmartFinder for searching customers.

VIDEMO - Extended Custom	er Inquiry			-		×
File Help A/R Customer Inquiry						
Customer No. National Account BARMART] ▶ ▶	Bargain Mart - San Diego Bargain Mart Stores, Inc.	Amounts In	Customer Currency	•	USD

Search:

• Enter one or more words or word fragments in the search entry field to search multiple tables and fields.

DTDEMO	- Extended Customer Inquiry	
<u>F</u> ile <u>H</u> elp		
Search	way	Find
Active Cust	tomers Only	

- You can also filter for Active customers.
- 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 "way" 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 customer address) are treated as a single field.

Display:

- The top grid displays the customers matching the search criteria.
- 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. The screen below displays ship-to locations for two different customers.

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

arch 🕫	ay .						Find
Active Custon	ers Only				_		
ustomer Numb	er Status	Customer Name	Short Name	🖃 Address Lin	Address Line 2	Address Line 3	Address Lin
210	Active	ACME Plumbing		927 Warehouse			
580	Active	Break-Away Des	BREAK	743 Wark Street			
890	Active	J & Y Builders Ltd.	J&Y	333 Ralston Way			
Anthun Chin T	Leasting Only						
Active Ship II	Colations Only	Onton	Dessertation	C Address 1 in	Address Uses 2	Address Line 2	Address Lie
narouna mont		Status	Description	Address Urt	Address time 2	Address time 5	Address Un
500	MID	Anticen	Mid	1000111 B.B.H	150 Termenian		
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500 550 380 380	MID BOOK EAST WEST	Active Active Active Active	Mid-way wareho Chapter One Bo Break Away - Ea Break Away - W	#2211 Mid-way 3383 Broadway 1802 West Boul 9754 Nigel Road	150 Tasmanian		
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500 550 580 580	MID BOOK EAST WEST	Active Active Active Active	Md+way wareho Chapter One Bo Break Away Break Away - W Preak Away - W	#2211 Mid-way 3383 United West Boult. 9754 Nigel Road	150 Tasmanian		
i00 i50 i80 i80	MID BOOK EAST WEST	Active Active Active Active	Md-way wareho Chapter One Bo Break Away - Ea Break Away - W	#2211 Mid-way 3.883 Bradmay 5.883 Bradmay 5.754 Ngel Road	150 Tasmanian		
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Selection:

- Double-click a customer in the top grid to select and enter the customer on the Extended Customer Inquiry form.
- Double-click a ship-to location in the bottom grid to enter the customer.

Drill down to the Extended Customers screen

The Drill Down button beside the Customer Name field displays the TaiRox Productivity Tools Extended Customers screen (or the Sage 300 A/R Customers screen if the TaiRox program is not enabled), allowing you to edit the customer information – or copy the customer to other Sage 300 databases.

You can also look up and edit the details for other customers while you are on this screen.

VTDEMO - Extern File Help A/R Cu	nded Customer Inquiry – C ustomer Inquiry	• ×
Customer No. 4 110 National Account BAR	Amounts In Customer Currency RMART	▼ USD
PTDEMO - Extend File Settings He	ded Customers elp A/R Customers	×
Customer Number		* Required
Customer Name	Bargain Mart - San Diego	
Address Contact Proc	cessing Invoicing Optional Fields Statistics Activity Comments	
National Account No.	BARMART Q Bargain Mart Stores, Inc.	
Business Reg. No.		
Group Code *	WHL Q Wholesale Sales Group	
C On Hold	Last Maintained 08/13/2018 Inactive	
Short Name	BMT-SD Start Date 01/01/2009 III Territory CA	
Address	Bargain Mart Plaza	
	Comer 182nd and 34th Street	
City	Anytown Country US	Q
State/Prov.	CA CA Call CA CA CALL CALL CALL CALL CALL CALL C	
Zip/Postal Code	45112 Fax (408) 451-8711	
E-mail	Jose@bargainmart.com	
Web Site	www.BargainMart.com	
Save	Delete Copy Custo	mers <u>C</u> lose

Choose the Customer currency

• For multicurrency systems, choose whether to view figures in the customer currency or in your functional currency.



Look up addresses in Google maps

• Click the Address button on the Extended Customer Inquiry Address tab to confirm addresses.



 Click the Address Line 1 column headings for ship-to address column headings to confirm the location of the selected ship-to address.

Description	Status	Date Last Mai	Optional Fields	🖪 Address Line 1	Address Line 2
Kamloops Credit	Active	8/18/2010	Yes	15077 University Avenue	
First National Ba	Active	8/18/2010	Yes	325 Sasmat Street	

Launch emails for customers and customer contact email addresses

• Click the E-mail or Contact's E-mail button on the Address tab to quickly create a new email.



• You can also click the Email column heading to create an email for the selected additional contact.

Contact's E-mail	ckjenner@	kjenner@chlorideus.com									
	Office)	Phone (Other)	🖃 Email	Notes	Inactive	Date Inactive	Date L				
	5-1871		carmenjenner10	Get approval if o	No		3/15/2				
			does not use	@RealBarryWhite	No		3/15/2				
				-							

Look up Web sites in your browser

 Click the Web Site button on the Extended Customer Inquiry Address tab to look up customer Web sites.

Address 1	Bargain Mart Plaza	
Address 2	Corner 182nd and 34th Stree	(⊂) (https://bergainmart.com/ + ≜ C bargain mart P + ∩ ☆ ③
Address 3		Arion Bargain Mat
Address 4		30.000 SOUARE FEET OF BARGAINS ^
City	Anytown	
State/Prov.	CA	Our Separate Euroiture, Elooring, Office, Game Room and other
Zip/Postal Code	45112	Large tems store is amazing! 50-90% Off Everything!
Country	US	Close outs Shelf Pulls All new with tags
Telephone	(408) 451-8981	cionolis sitei nuisvienen wich ags.
Fax	(408) 451-8711	You name it we probably have it!
E-mail	Jose@bargainmart.com	
Web Site	www.BargainMart.com 🦊	Electronics, furniture, domestics, toys, sporting goods, tools, appliances & More!
Contact	Mr. Jose Grange	no nonsense-no gimmicks real bargains from nice people
Contact Phone	() -	If your shopping anywhere else you are throwing your money away!
Contact Fax	() -	
Contact E-mail		

View receipts for customers where the National Account is the payer

- Select the customer account in the SmartFinder and select the Receipts tab.
- Click the National Account Receipts button at the bottom of the screen to view all payments from the national account on behalf of the customer.

SAMLTD - Extended Customer Inquiry	-		×
File Help A/R Customer Inquiry			
Customer No. 4 1105 F Q C Bargain Mart - Oakland	Amounts In Customer Currency	• •	2
National Account BARMART Bargain Mart Stores, Inc.]		
Profile Address Tax/Sales Credit Status Comments Ontional Eds Shin-To Recur Charges Activity/Stats			
Documents Receipts Refunds Adjustments Pending QE Orders QE Invoices QE Sales IC Contract Pricing			
Receipt Status			
V Dutstanding V Cleared V Hetumed Vice by Exception of the second			
Charly/Density Ma. Density Total	a Cradt Rank Currence 1	ank [A	
00000004-0003 6/2/2019 Search Search	0.00 USD		
00000005-00003 9/2/2019 Order By Check/Receipt No. Customer Number 1105	0.00 USD		
000000004-0002 3/10/2020 Check Cleared All National Account BARMART	0.00 USD		
00000020-00003 5/10/2020 00127-002 1/21/2019 Check/Receipt No. Receipt Date Receipt Stat., Paver Receipt Amount Discount Amo	0.00 USD 0.00 CAD		
000000069-00001 10/8/2020 Outstanding Bargain Mart Stores Inc. 3,117.890 0.0			
		-	
4		F	
Posting Date Year Period T		^	
6/2/2019 2019 06 R		- 1	
14 4 Page 1 of 1 b bit		- 1	
Posting Dale Year Period Transaction Type Payment No. 🖸 Ref. Document Number Transa			
10/8/2020 2020 10 Receipt - Posted 1 IN000000000059 = 10/8/2020 2020 10 Receipt - Posted 1 IN7801		-	
10/8/2020 2020 10 Receipt - Posted 1 IN7870	National Account Receip	ots	
Petrode		Class	
THE CONTRACT OF CONTRACT.		Cluse	
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(m)			
Close			

In this example, Bargain Mart Stores Inc. made a payment that included two invoices for Bargain Mart – Oakland.

You can view the receipt by looking up Bargain Mart – Oakland, then choosing National Account Receipts – or by looking up the BARMART customer account.