Extended Inventory Items

Extended Inventory Items is an enhanced replacement for the Sage I/C Items screen. It provides you with more functionality for adding and maintaining inventory items, and lets you copy existing item records to other Sage 300 company databases.

Extended Inventory Items lets you:

- Look up items quickly with the Item SmartFinder, specifying one or more words in a search field.
- Copy a single inventory item, making it easy to add items with several colors or finishes.
- Check whether items with zero quantities are being referenced by Sage 300 modules before deleting them (such as in old sales orders or purchase orders).
 The Item in Use button at the bottom of the form checks for all references to items throughout Sage 300 modules to make sure that deleting items will not cause integrity errors.
- Drill down to Extended Vendor Details to check or enter item costs, Extended Customer Details for customer item numbers, Extended Item Pricing, Extended Location Details, Extended Manufacturers' Items to enter manufacturers' item numbers, and Extended Reorder Quantities.
- Maintain a full or partial set of inventory items across multiple Sage 300 companies using the Copy Items functionality.
 - Specify a range of items from the current company, filter them by additional criteria, cherrypick items from the results, and then copy the final set to other Sage 300 companies.
 - Select or de-select companies on an individual basis.
 - Update item descriptions only.
 - Display a full log of updated items.
- Automatically update item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions.
- Use the Update button to synchronize item descriptions in Sage 300 and AutoSimply tables.

The following screens show the extra features provided by the Extended Inventory Items screen:

Sage I/C Items screen

TaiRox Extended Inventory Items screen

tå. PTDEMO-1/C Items – □ × Elle Belp	SAMLTD - Extended Inventory Items – C X	
Item Number I 4 4 (ALEOLOU) + + Q + 0 Publication Desk Lamp	Item Number <td <td="" <td<="" th=""></td>	
Norme Units Tayes Optiogal Reids	terre Unta Tages Optiogal Fields	
Blocker Cole 310 Blanded Last Maraned BL/SC 2013 Category A1 Q Accessorie Category All Scatter Category A1 Q Accessorie Category All More Among Category All All	Studue Code STD Standard Last Maranet Cologyy A1 Cology A0 Cology Konstance Dridue Pres Lat Standard Windy Average Dridue Pres Lat Cology Konstance Dridue Pres Lat Cology Konstance Dridue Pres Lat Cology Konstance Dridue Pres Lat Cology Cology Unit Wright Cology Cology Unit Wright Standard None of Later Wright Unit Standard Cology Standard Wright Unit Standard Standard None of Later Wright Unit Standard None of Later Standard Wright Unit Standard None of Later None of Later	
Additional Item Information	Addisonal ten Homation	
Comes with stand and mounting bracket for wall or shelf.	Comes with stand and mounting bracket for wall or shell.	
Uses a 13W mini fluorescent bub (included).	Uses a 13W min fluorescent bub (included).	
Maximum reach is 36°° (91cm).	Maximum reach is 16*** (\$1cm).	
Back only.	Black only.	
Save Dete	Seve _ Delee _ Vendor Details] Let Pricing] Location Details] Manufactureni Itens] Reorder Quantities] Copy Itens] Let in 104e	

Note: You may need to maximize the Extended Inventory Items screen to see all of the Sage 300 and TaiRox Productivity Tools buttons at the bottom of the screen.

The Extended Inventory Items icon appears under **TaiRox Productivity Tools > Inventory Control Tools** on the Sage 300 desktop and can be copied to other menu locations.

Using the Item Number SmartFinder button

Click the Item Number button to open the SmartFinder for items.

SAMLTD - <u>F</u> ile <u>H</u> elp I	Extended Inve /C Items	ntory Items				-	• ×
Item Number	A1-103/0		 ▶ ▶	Copy	Fluorescent D	esk Lamp	Update
l <u>t</u> ems <u>U</u> nits Ta	axes Optional Fiel	ds					
PTDEMO - Exter	nded Inventory Iten	ns					
<u>F</u> ile <u>H</u> elp							
Search desk l	amp						Find
Active Items Only							
Item Number	Status	Description	Category	Default Picking	Commodity Num	Comment 1	Comment 2
A1-103/0	Active	Fluorescent Des	A1	0040		Comes with stan	Uses a 13W m
A1-310/0	Active	Halogen Desk Li	A1	0041		Desk lamp with	Equipped with

The Item SmartFinder provides a Search field for entering search words and a selection grid with the search results.

- Enter one or more words or word fragments in the Search field to search multiple tables and fields.
- Click the checkbox to search for Active items only.
- Search returns items that contain the search string in any of the searched fields.

In the example above, "desk lamp" appears in the description for one item and in the comment field for the other item. Both items are displayed.

Note:

- All of the word fragments must be present in one of the fields being searched.
 For example, if you searched 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.
- Using multiple words in the search? Enter "300 Main" and the search will find entries "<u>300</u> <u>Main</u> Street" as well as "123 <u>Main</u> Street, Suite <u>300</u>".
- **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(<u>451</u>) 555-<u>8991</u>" as well as "(408) <u>451-8991</u>".

Copy Inventory Items to other Sage 300 companies

IMPORTANT:

You must enter a User ID and Password to copy item information. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new items into other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the inventory items that you want to copy.
 - Copy Items operates from within an existing "source" company, and lets you copy item information to other Sage 300 company databases.
- Open the Extended Inventory Items form, and click the Copy Items button at the bottom of the screen.

	Additional Item Information						
L	Comes with stand and mounting bracket for wall or shelf.						
L	Uses a 13W mini fluorescent bulb (included).						
L	Maximum reach is 36"" (91cm).						
L	Black only.						
ľ	Save Delete Vendor Details Customer Details Item Pricing Location Details Manufacturers' items Reorder Quantities Copy items item in Use Cose						

When you click the Copy Items button, a window will pop up for selecting inventory items in the current (source) company.

File Help File Help Select tems By From To Wore) (None) (None) <td< th=""><th></th></td<>	
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Select items By From To None) (None) (None) (None)<	
Name iem Number (None) • (Select tems By Segment Code Sayle	
(None) • (Category ZZ <td></td>	
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Segment Name Q, From Q, To Category ZZ E Style ZZZ Category ZZZ E	
Category ZZ # Style ZZZ Color ZZ	
Syle ZZZ L Color Z	
Model ZZZZZ +	
Substitute Segment Code	
Include Item Number Description Structure Co Categ Account Set Co	
Yes C2-999/G New Steno Chair STD C2 FIFO	
Select All Select None 1 Items selected.	
Copy Log Close	

Note: By default, the grid at the bottom of the form will display new items that were added in this session. This allows you to copy these new items directly to other Sage company databases.

To copy or update any set of items, start at the top of the form to specify the range of inventory items that you want to copy or update. The program displays the last set of ranges and filters used for copying and updating items. Click the Load button to use the previous settings.

Specify range of inventory items for copying:

You can specify ranges for up to seven inventory item fields to use for item selection – including the item number, structure code, category, account set, or any of the optional fields that you use for inventory items.

Item Range			
Select Items By	From	То	
(None)	-		
(None) tem Number Structure Code Category Account Set Code Items Color Items Color Edended Warnety Available Item Tope Item Load Time Manufacturer Manufacturer Manufacturer Manufacturer New Item Procurement Item Size			Load
Item Volume			
Warranty Warranty Period	From	Q, To	
Wallality Fellou		77	_

• The screen above shows a number of optional fields that you can use for item selection.

Choose additional criteria:

	Additional Crite	eria	Load
Iten	Q, Set Crit	eria - Items	
Sele Se	Column	Allow Item in Web Store Add Delete	
Col Mo Ser Lor	Field Criteria Or	Allow Item in Web Store	
Incli Yes Yes Yes			€ Co ▲
Yes Yes Yes Yes	Show Filte	ar Clear Edit Save	OK Cancel

• Click the Additional Criteria button to use any inventory item field to filter items for copying. Click OK to save.

Select items using ranges of segment codes:

You can specify ranges for all of the item segment codes that are used for inventory.

For example, the following screen shows that only items in category A1 will be included.

Select Items By Segment Code						
Segment Name	Q From	Q, To	<u>^</u>			
Category	A1	Al	E			
Style Color		ZZZ				
Color		Z				
Model		22222	-			

Substitute segment codes when copying:

This checkbox lets you copy a group of items with one segment code value to create a new group of items with a new segment value.

For example, if one of your item number segments shows the item color, you can copy an existing set of "Black" items to a new set of "Silver" items.

• The new segment values must already be added to Inventory Control using the TaiRox Extended I/C Segment Codes form or the Sage I/C Segment Codes form.

For example, if you are adding items with a new color code "L", you must add the "L" segment code before you copy inventory items using item substitution.

• **Extended Inventory Items allows copying from a company to itself.** If other companies are selected, the operation will only be performed on those companies that have the target segment code. All exceptions will be logged.

For example, the following screen shows that all items with "B" (black) Color segment codes will be copied to new item records with "L" (silver) Color codes.

V Substitute Segment Code	Color 👻	From	В	Q	То	L	Q	

• Select the Substitute Segment Code checkbox, choose the segment that you want to substitute values for, and then specify the source and target values.

Load the list of Inventory Items and choose which ones to copy:

• Click the Load button to display the list of Inventory Items.

When the Load button is pressed, the program will display the inventory items in the item and segment ranges and with the additional criteria that you specified.

• You can adjust the ranges or additional criteria if necessary, then click Load again.

Item Se	ment Substitution			- /		
Select Ite	Ims By Segment Co	de				
Segme	nt Name	Q, From	Q, To	/		^
Catego	у	A1	AI			=
Style			72			
Color			2			
Model			22222			Ŧ
V Subs	tute Seament Code	Color Trom	B	То	L	
	tate beginnin bout			10	-	4
Include	Item Number	Description	Structure Co	. Categ	Account Set Co	Ľ
Yes	A1-103/0	Fluorescent Desk Lamp	STD	A1	AVG	١,
Yes	A1-105/0	13W Mini Fluorescent Bulb	STD	A1	STD	
Yes	A1-310/0	Halogen Desk Light	STD	A1	FIFO	
Yes	A1-320/0	50W/12V Halogen Bulb	STD	A1	LIFO	
Yes	A1-400/0	Desk Note Book	STD	A1	MRC	
Yes	A1-401/0	Desk Calendar Pad	STD	A1	USER	
Yes	A1-450/0	Bulletin Board	STD	A1	AVG	
Yes	A1-460/0	White Melamine Board	STD	A1	AVG	
Yes	A1-470/0	Dry-erase White Board Markers	STD	A1	AVG	
Yes	A1-500/0	Hanging File Folder	STD	A1	AVG	
	lect All	Select None 37 Items selected.				
Se						

• Click the Select All and Select None buttons at the bottom of the screen to include all or none of the items loaded in the grid for copying.

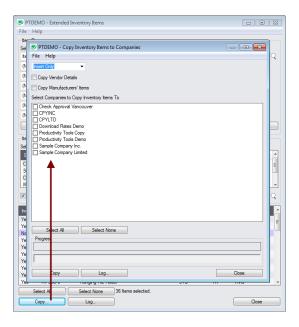
Select All Select None

• Double-click in the Include column to "cherry-pick" Inventory Items:

Include	Item Number	Description	Structure Co	Categ	Account Set Co	Ľ
Yes	A1-103/0	Fluorescent Desk Lamp	STD	A1	AVG	
Yes	A1-105/0	13W Mini Fluorescent Bulb	STD	A1	STD	
No	A1-310/0	Halogen Desk Light	STD	A1	FIFO	1
Yes 13	A1-320/0	50W/12V Halogen Bulb	STD	A1	LIFO	

Click the Copy button to display the To Companies screen:

When you are happy with the set of items that you have selected, click the Copy button at the bottom of the screen.



Select whether to insert new codes or update existing ones in target companies:

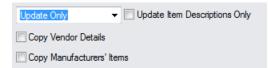
Before proceeding, you must decide whether to add or update codes in the target companies.

For example, choose Update Only to update address and contact information for all items.

Update Only	-
Insert Only	
Update Only	
Insert and Update	

- Choose whether to insert, insert and update, or just update inventory items.
 - o Insert Only will add codes if the code does not already exist. It will not change existing codes.
 - Update Only will only update codes that do exist but not add new ones.
 If updating codes only, you can also choose to update the description only.
 - o Insert and Update will perform both of these operations.

Specify which data to update/insert:



- Choose which data you want to update or insert item descriptions, vendor details or manufacturers' item details.
 - Update Item Description Only appears for Update Only. If you choose it, the other two "Copy" choices will not be available.

This checkbox will change item descriptions only – it doesn't matter whether other item properties match.

- Note that Copy Vendor Details and Copy Manufacturers' Items are not selected by default.
- Except for the special case of changing the description only, an update operation will attempt to change the item in the target company to be just like the item in the source company.

In order to do so, it will delete various properties (such as Optional Fields) from the target item and then add the properties from the source item. It's possible for the update to fail if properties don't match or items are in use.

Select target Sage companies:



 Click the Select All and Select None buttons at the bottom of the form to include all or none of the target companies.

Select All Select None

Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy items:

Select Companies to Copy Invento	ry Items To	
Check Approval Vancouver CPYILTD CPYILTD CPYILTD Download Rates Demo Productivity Tools Copy Productivity Tools Demo Sample Company Inc. Sample Company Limited	PTDEMO - Sage 300 Sign-on User ID ADMIN Password OK Cancel	
Select All Select All	ect None	
Сору	Log	Close

- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.

Note: You MUST have sufficient permissions to update inventory items in the target companies for copying to proceed.

- The program will copy the inventory item information to the target companies.
- If no changes are required for a selected item, no update will be performed so the audit stamp will be preserved.
- If you cancel the operation during the copying process, you must check the log to see which procedures were completed and assess how you want to continue.

Click the Log button to confirm which Inventory Items were processed:

7/23/2020 8:53:04 AM Copy Inventory Items to Companies started.	
7/23/2020 8:53:04 AM	
7/23/2020 8:53:04 AM Logged in user: ADMIN	
7/23/2020 8:53:04 AM Performed by user: MORGAN	
7/23/2020 8:53:04 AM	
7/23/2020 8:53:04 AM Update Only	
7/23/2020 8:53:04 AM Update Item Descriptions Only: No	
7/23/2020 8:53:04 AM Item segment Color B is being substituted by Color L	
7/23/2020 8:53:04 AM Copy Inventory Items to Companies: Sample Company Limited	
7/23/2020 8:53:07 AM	
7/23/2020 8:53:07 AM Copying items from Productivity Tools Demo to Sample Company Limite	ed
started.	
7/23/2020 8:53:07 AM Logging in to Sample Company Limited	
7/23/2020 8:53:08 AM Updating item A1-103/0	
7/23/2020 8:53:08 AM Item updated.	
7/23/2020 8:53:10 AM Item A2(IMAGE-1500)G does not exist. Item not updated.	
7/23/2020 8:53:10 AM Updating item A2(QUEEN-STAR)0	
7/23/2020 8:53:10 AM Item updated.	
7/23/2020 8:53:10 AM Logging off of Sample Company Limited	
7/23/2020 8:53:10 AM	
7/23/2020 8:53:10 AM There was 28 items updated.	
7/23/2020 8:53:10 AM There was 8 items not updated.	
7/23/2020 8:53:10 AM Copying items from Productivity Tools Demo to Sample Company Limite	ed
complete.	

The Log lists:

- The user, the type of operation performed, and the range of items.
- Each item that was processed and whether the items were updated or inserted.

Copy a single Inventory Item using the Copy button

The Copy button at the top of the Extended Inventory Items form lets you copy the current inventory item to a new inventory item number. This is especially useful if you are adding items that come in a variety of colors or finishes.

SAMLTD - Extended Inventory Items	-		×
Item Number Image: A state of the state		Update	e
Items Units Taxes Optional Fields			

To copy a single item

- Select the item that you want to copy.
- Click the Copy button (shown above).

The following form appears:

SAMLTD - Cop	y Item		X
<u>F</u> ile <u>H</u> elp			
Item Number	F1-265/B	Filing Cabinet - 2 Drawers	
Structure Code	STD	Standard	
New Item Number			
Copy Item			Close

Note: If you have just updated the item, you must Save it before copying the item.

- Enter the new item number in the New Item Number field.
 - The new item number must use the same item number structure code as the original item.

For example, you could copy item "F1-265/B" to new item number "F1-265/R", where both use the same item number structure code.

- You don't need to enter the segment separator characters.
- Click the Copy Item button to continue.
- Click the Add button on the Extended Inventory Items screen to add the inventory item.

The new item record includes all the information from the original item – except that it lists the original item as an "Alternate Item".

After copying

- Check that the information on the new record is correct such as the picking sequence, alternate item, and optional fields.
- Click the Copy Items button at the bottom of the screen to copy the new inventory item to other company databases.

Use the "Item In Use" button to check Inventory Items

The Item in Use button at the bottom of the Extended Inventory Items form lets you check it you can safely delete inventory items from the Inventory Control system.

	Additional Item Information		
	Comes with stand and mounting bracket for wall or shelf.		
	Uses a 13W mini fluorescent bulb (included).		
	Maximum reach is 36"" (91cm).		
	Black only.		
L	Save Delate Vendor Details Customer Details Item Pitcing Location Details Man	nufacturers' items) Reorder Quantities Copy items ken	m in Use

Sage 300 allows inventory items to be deleted as long as there are no quantities in stock - however, this can be a problem.

- Even when item quantities are zero, item numbers can still appear in orders or purchase orders or historical data that has yet to be purged.
- If an item is deleted when it is still referenced in other modules, the integrity checking program will • flag these references as errors, and some operations in Sage 300 may not behave as expected. In addition, some reports will display incomplete or inaccurate data.

The "Item in Use" button in Extended Inventory Items lets you check whether or not an item is being referenced in such a way that deleting the item would cause integrity errors.

To check whether items are in use or can be deleted

- Select the item in Extended Inventory Items. •
- Click the Item in Use button at the bottom of the form. •
- Click the "Check" button at the bottom of the pop-up Item in Use form.

The program will check all core modules and known third-party modules will be checked for references to the selected item.

If unknown third-party applications are present, they will also be listed, along with a message advising you of a possible risk with deleting the inventory item:

Extended Inventory Items has encountered the following applications that are not supported. Deleting items should only be performed if the unsupported applications do not use items in Inventory Control.

Any tables referencing the item – for which deleting the item would cause integrity errors – will be listed, as shown below:

💌 PTDEMO - Ite	em in Use		×
<u>File</u> <u>H</u> elp			
Item Number	A1-103/0	Fluorescent Desk Lamp	
tem Number in tem Number in	55A use in table ICILOC use in table ICS/FED use in table ICS/FR use in table ICS/FAT use in table ICS/FAT		E
Item Number in Item Number in Item Number in	use in table OEORDD use in table OESHID use in table OESHD use in table OESHDT use in table OECRDD		-
•			•
Progress			
Check			Close

If no tables are listed (as below), the item may be deleted without causing integrity errors (subject to a warning concerning unknown-third party applications).

r			
S PTDEMO	- Item in Use		- • •
<u>F</u> ile <u>H</u> elp			
Item Number	C2-999/G	New Steno Chair	
Extended Inve Contact Ma		d the following applications that are not s	supported. Deleting items should o 🔺

Drill Down to Vendor, Customer, Pricing & Location Details

Extended Inventory Items provides direct access to all the information that you maintain for inventory items. Click the buttons at the bottom of the screen to display or edit the following information for the current item.

ditional Rem Information	
mes with stand and mounting bracket for wall or shelf.	
es a 13W mini fluorescent bulb (included).	4
xximum reach is 36"" (91cm).	1
uck only.	1
	1
Save Delete Vendor Details Customer Details Kem Pricing Cocation Details Manufacturers' tems Reorder Quantities Copy tems tem in Use Gose	l

Vendor Details: View/edit vendors linked to inventory items, and view/edit item costs.

Customer Details: View/edit item numbers that your customers use for your inventory items.

Item Pricing: View/add items on price lists, view/edit discount or markup information, view/assign tax authorities and tax classes to inventory items.

Location Details: Check/update locations where stock items, view/update costing information, view quantities on PO and sales orders, and view/edit last item cost.

Manufacturers' Items: View/add numbers to the items in your inventory (such as UPC bar codes).

Reorder Quantities: View/edit reorder information for inventory items.

Automatically Update Item Descriptions on Price Lists, other Sage 300 Tables, and in AutoSimply BOMs

Extended Inventory Items will automatically update item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions.

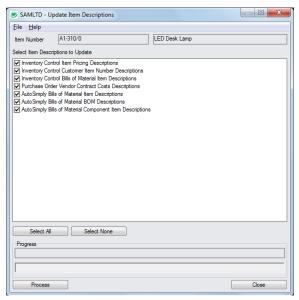
In the following example, the description "Halogen Desk Light" has been changed to "LED Desk Lamp'.

🖬 SAMLTD - Extended Inventory Items 🥏 - 🗖 🗙
Eile Help VC Items
Item Number Item
Structure Code STD Standard Last Maintained 06/21/2021 Category A1 Q Accessories Account Set Code FIFO Q FIFO Costing Method FIFO
Default Price List CANADA Q + Canada Price List Commodity Number Image: Commodity Number Image: Commodity Number Default Picking Sequence 0041 Image: Commodity Number Unit Weight 1.5000 Image: Commodity Number A1-310/0. Do you want to change the Item Price descriptions for this Item Number A1-310/0. Do you want to change the Item Price descriptions for this Item Number to 'LED Desk Lamp'? Weight Conversion Factor 1.0000000
Atemate Item A1-103/0 Q Fluores
Desk lamp with adjustable reflector and arm. Equipped with switch for two different levels of brightness.
Ecapapeo wai swacino two aireent eves o inspirates.
Back only.
Save Delete Vendor Details Customer Details Item Pricing Location Details Manufacturers' items Reorder Quantities Copy items Item in Use Gose

• When you click the Save button, the program will display the message displayed above:

"You have changed the description for Item Number nnnnnnnn. Do you want to change the Item Price descriptions for this Item Number to "XXXXXXXX"?

• If you click the Yes button, the program will display the following screen to let you update price list descriptions, and well as other descriptions associated with the item:



• Click the Select All and Select None buttons at the bottom of the form to select the descriptions that you want to update.

Select All Select None

- Use the checkboxes to complete your selection.
- Click the Process button to update all item descriptions.

Other screens in Sage 300 - such as Item Pricing screens - will now show the updated item descriptions:

PTDEMO - I/C Item Pricing <u>File</u> <u>H</u> elp	-	×
Item Prices I ◀ ♦ ▶ I ♀ +		
Currency Code CAD Canadian Dollars		
Price List Code CANADA Q + Canada Price List		
Item Number A1-310/0		
Prices Discounts Price Check Taxes		

Use the Update Button to Synchronize Item Descriptions on Price Lists, in other Sage 300 Tables and in AutoSimply BOMs

Extended Inventory Items automatically updates item descriptions on price lists, customer items, BOMs, vendor contract costs, and in AutoSimply BOMs when you update item descriptions. (See the above section for a description of the auto-update feature.)

However, if you previously updated item descriptions, and the descriptions are now out of synch with descriptions on other Sage 300 and AutoSimply screens, you can use the Update button on the Extended Inventory Items screen to manually update the item descriptions.

For example, if the item descriptions for customer item numbers or on AutoSimply BOMs do not match the descriptions in the Inventory Item record, follow these steps to synchronize the item descriptions.

To use the Update button to update item descriptions

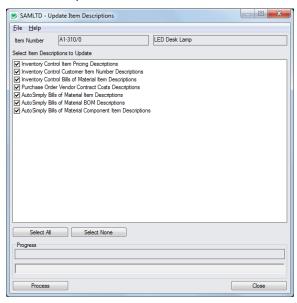
• Select the item with the item description that you want to synchronize on other screens.

SAMLTD - Extended Inventory Items	-		×
Eile Help I/Citems			
Item Number Image: All-103/0 Image: Plane Pla		Updat	te
tems Units Taxes Lots Optional Fields			~

• Click the Update button beside the item description.

Note: If you have just updated the item, you must Save it first.

The program will display the following screen to let you update price list descriptions, and well as
other descriptions associated with the item:



• Click the Select All and Select None buttons at the bottom of the form to select the descriptions that you want to update.

Select All Select None

- Use the checkboxes to complete your selection.
- Click the Process button to update all item descriptions.

Set a Default "Specific Location" for Reorder Quantities

You can set a default specific location for Reorder Quantities, so when you click the Reorder Quantities button, the Reorder Quantities screen will display the current inventory item and the default specific location.

Click the Go button to view/edit the reorder quantities.

🗾 SAMLTD - E	Extended Reorder Quantities		-	×
<u> </u>	C Reorder Quantities			
Reorder Quantities	I∢ ∢ ▶ ▶I ♀ +			
Item Number	A1-103/0 Q Fluorescent Desk La	mp		
Reorder for	Specific Location 👻 2 🔍 Portland Office			
Unit of Measure	Ea.			
Optional Fields	6			

Use the Settings choice on the Extended Reorder Quantities File menu to set a default location for the "Specific Location" field on the Extended Reorder Quantities field.

SAMLTD - Extended Reorder Quantities		
File Help I/C Reorder Quantities		
Customize	(SAMLTD - Extended Reorder Quantities Settings
Settings	1-103/0	Specific Location 2 Q Portland Office
	pecific Location 🔻 2	Save
Close	э.	

- Select File > Settings from the Extended Reorder Quantities File menu.
- Select the Specific Location that you want to appear by default, and choose Save.

Leave the field blank if you do not want to set a default location.

Note: The Extended Reorder Quantities program can be launched from the Sage 300 Desktop – as well as from the Reorder Quantities button at the bottom of the Extended Inventory Items screen.

There are two separate default settings – one when you launch from the Desktop, and one when you launch from Extended Inventory Items. If you want the same default location to appear no matter where you launch the program, make sure to open both instances of the program and change the settings for each one.

Note also that properties are saved separately for each user ID.