

Extended PO Entry is an enhanced replacement for the Sage Purchase Orders Entry form. It provides you with more information while entering a PO and fast access to additional PO, Vendor, and Item information.

Sage Purchase Order Entry screen



[SmartFinder – Purchase Orders](#) Finds purchase orders and shows PO details quickly for any vendor.
[SmartFinder – Vendors](#) Find a vendor quickly from a name, description, phone number, or address.
[SmartFinder – Items](#) Find an item quickly from partial item number or description. Search also by manufacturer's item number with the Enterprise version of Productivity Tools.

SmartFinders provide fast, browser-like search capabilities for looking up data on the PO Entry screen. They search more fields than the Finder, and search in all text fields at once. For example, search for “Seattle” if you think that the vendor or contact is in Seattle.

[Vendor Inquiry](#) (button left of the vendor name field) provides complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

Vendor Optional Fields Display any vendor optional fields on the Extended PO Entry screen.

Quantities Display Show item quantities at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module.

Item Quantities Display quantities available at other locations or in other companies while entering a purchase order.

Update Order Update the expected arrival date or vendor cost of an item, or substitute items on a PO.

Drop Ship Drop ship dozens of purchase order detail lines in a single operation.

Line Finder Quickly find a detail line in a large order by item number, location, order number, or vendor item number.

Purchase from History Create a new purchase order for a vendor based on what has been previously purchased from that vendor.

Prepayments View the details of any prepayments entered for the current vendor and purchase order.

Quick PJC Entry Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

Note: You may need to widen the Extended PO Entry screen to see all of the Sage 300 and TaiRox Productivity Tools buttons at the bottom of the screen. Click the Maximize button to see all features.



SmartFinder – Purchase Orders

Click the PO Number button to open the SmartFinder for searching purchase orders.

PO Number

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by purchase order type and include completed and on-hold purchase orders.
- Search returns 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 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 PO where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the POs matching the search criteria. Double-click to select a PO.
- The bottom grid displays the details of the purchase order highlighted in the top grid.
- Click the Address 1 column heading or double-click the address to launch **Google Maps** with the vendor 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.

The screenshot shows the PTDEMO - Extended PO Entry window. At the top, there is a search bar with the text "leon" and a "Find" button. Below the search bar, there are checkboxes for "Include Completed Purchase Orders" and "Include Purchase Orders on Hold". The main window is divided into two sections. The top section is a table with columns: Purchase Order, Vendor, Name, Address 1, Address 2, Address 3, and Address 4. The bottom section is a table with columns: Item Number, Item Description, Location, Quantity Ordered, Unit of Measure, Vendor Item No., Expected Arrival, and Order Number. The bottom table shows details for item A1-400-0, including a Desk Note Book, and other items like A1-401-0, A1-450-0, A1-470-0, A1-650-0, and A1-655-0.

Purchase Order	Vendor	Name	Address 1	Address 2	Address 3	Address 4
PO00000007	Active	4540	Leon Industries	342 Central Park		
PO00000008	Active	4540	Leon Industries	342 Central Park		
PO00000009	Active	4540	Leon Industries	342 Central Park		
PO00000010	Active	4540	Leon Industries	342 Central Park		

Item Number	Item Description	Location	Quantity Ordered	Unit of Measure	Vendor Item No.	Expected Arrival	Order Number
A1-400-0	Desk Note Book	1	200	Ea.		1/13/2019	
A1-401-0	Desk Calendar ...	1	200	Ea.		1/13/2019	
A1-450-0	Bulletin Board	1	200	Ea.		1/13/2019	
A1-470-0	Dry-erase White ...	1	200	Ea.		1/13/2019	
A1-650-0	Highlighter	1	500	Ea.		1/13/2019	
A1-655-0	Pen	1	500	Ea.		1/13/2019	

SmartFinder – Vendors

Click the Vendor Number button to open the SmartFinder for searching vendors.

Vendor Number

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can also filter for Active vendors.
- Search returns vendors and remit-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:

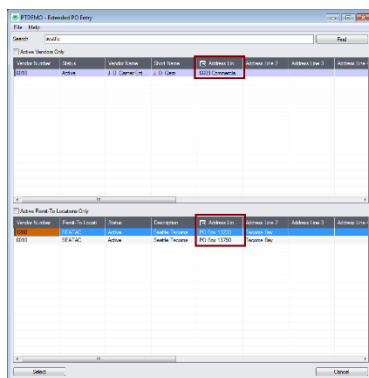
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for “Ross Blvd”, you will not see a vendor where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

Display:

- The top grid displays the vendors matching the search criteria.
- The bottom grid displays the remit-to locations that match the search criteria.

Note that the remit-to locations *may not* be related to the vendor records displayed in the top part of the screen. The screen below displays remit-to locations for two different vendors.

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

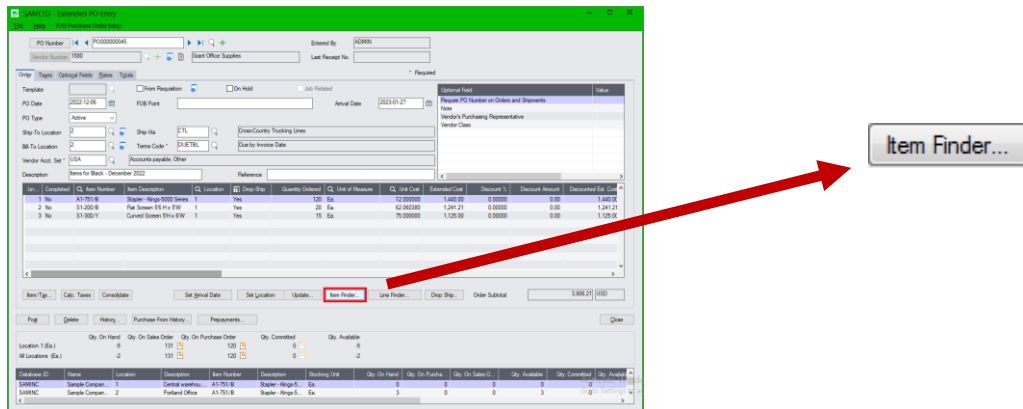


Selection:

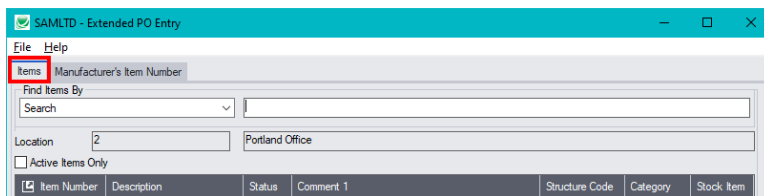
- Double-click a vendor in the top grid to select and enter the vendor on the purchase order.
- Double-click a remit-to location in the bottom grid to add the vendor and this remit-to address to the purchase order.

SmartFinder – Items

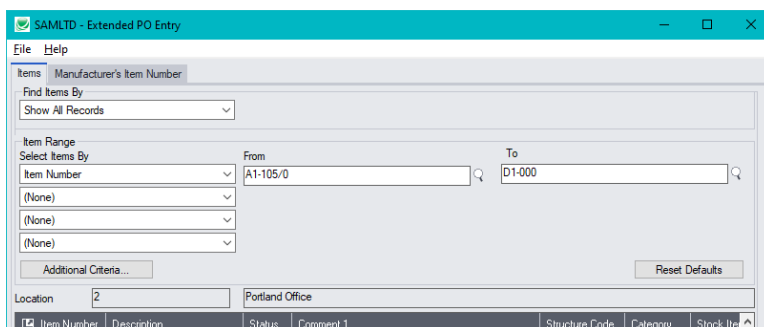
Click the Item Finder button under the item grid to open the SmartFinder for items.



The Item Finder provides several item search options and displays search results in a selection grid with columns such as description, alternate item number, stock item flag, or sellable flag. You can select which columns are displayed.



- The Item Finder appears with the “Search” selected by default on the Items tab. This is the most common way to look up items.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for items.
- Alternatively, select a different “Find Items By” choice from the Find Items By dropdown. For example, you can choose “Show All Records” and specify a range of item numbers, structure codes, categories, or account sets using the range fields. You can specify more selection fields using Additional Criteria.



Notes:

- The above search screen displays two tabs for looking up inventory items – Items and Manufacturer's Item Number – which let you search for I/C item numbers or for manufacturer's item numbers.

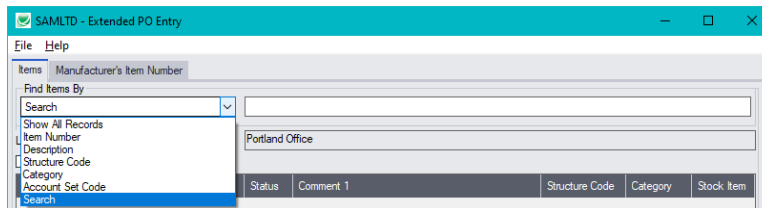
Search for manufacturer's item numbers is a Productivity Tools Enterprise feature.

The Manufacturer's Item Number tab will **not** appear unless you have a license for the Enterprise version of Productivity Tools.

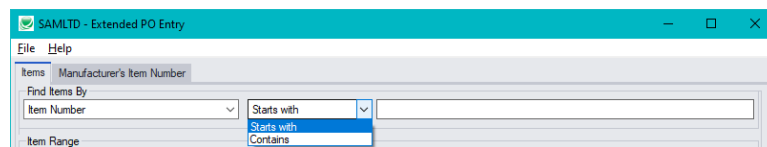
- If you do not select the SmartFinder “Search” option, you can select up to four item field ranges – by item number, status, structure code, category code, and account set code.
- The item price is the quantity zero price for that customer.
- The Item Finder also displays all columns that are in the standard Sage Finder. You can choose which columns appear in the Item Finder by selecting File > Settings from the Item Finder menu.
- Selecting an item inserts a new row into the PO entry grid.

Searching for Inventory Control Item Numbers on the Items Tab

The Item Finder on the Items tab provides 7 search options:



- **Search** (most common option) – to search for words or word fragments in item text fields (such as the item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the PO Number and Vendor Number SmartFinders.
- **Show All Records** – to select items from all item records based on ranges of Item Number, Structure Code, Category, and Account Set Code and on item Status. You can also specify additional selection criteria to use more item fields.
- **Item Number** – to select items using part of the item number. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.



Search by Item Number, Description, Structure Code, Category and Account Set Code also let you specify a search value that the item starts with or contains.

Note that the “Search” choice automatically looks in these fields and looks at all characters in text fields.

- **Description** – to select items that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Structure Code** – to select items with structure codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Category** – to select items in categories that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

- **Account Set Code** – to select items with codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

More on the “Search” option (most common option):

The screenshot shows the 'Find Items By' dropdown set to 'Search'. The search field is empty. The Location is set to '2' and 'Portland Office'. The 'Active Items Only' checkbox is unchecked.

- Select Find Items by Search. (Note that Find Items By defaults to the last choice used.)
- Enter one or more words or word fragments in the next field to search multiple item tables and fields. (Note that the program scans all columns displayed by the Item Finder.)
- You can filter for Active items only.
- Search returns items and vendor item numbers that contain the search string in any of the searched fields – for example, one record may have “Desk” in the Description field, where another may have it in the Comment 1 field. Both items 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:

- *If using the Search option, all of the word fragments must be present in one of the fields that are displayed on the screen. (For example, if you search 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.)*

Display:

- The top grid displays the items matching the search criteria. The screen below shows “Desk Lamp” in the description of one item, and “Desk Lamp” in the comments of the second one – so both appeared.
- The bottom grid displays any entered vendor item numbers for the item selected in the top grid.

The screenshot shows the search results for 'Desk Lamp'. The top grid displays two items:

Item Number	Description	Status	Comment 1	Structure Code	Category	Stock Item
A1-310-0	Fluorescent Desk Lamp	Active	Connect with stand and rotating bracket for wall or	STD	A1	Yes
A1-310-0	Fluorescent Desk Light	Active	Desk lamp with adjustable reflector and arm.	STD	A1	Yes

The bottom grid displays Vendor Item Numbers:

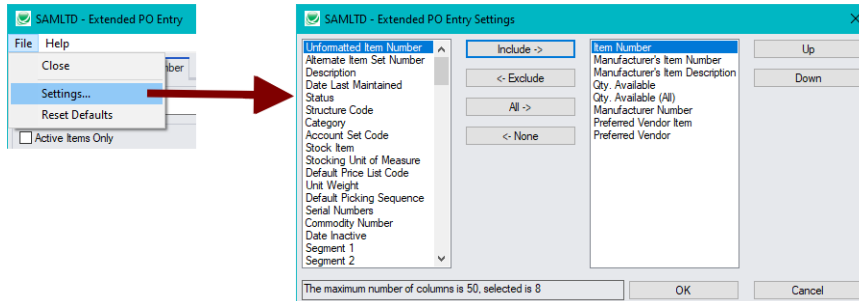
Vendor Item Number	Vendor Type	Vendor Name	Vendor Contact	Cost Unit

Selection:

- Double-click an item in the top grid to select and enter the vendor on the purchase order.
- Double-click a vendor item number to enter the item number and the vendor item number into the PO form.

Selecting columns to display – and scan – in the Item Finder

Choose **File > Settings** in the Item Finder window to change column settings.

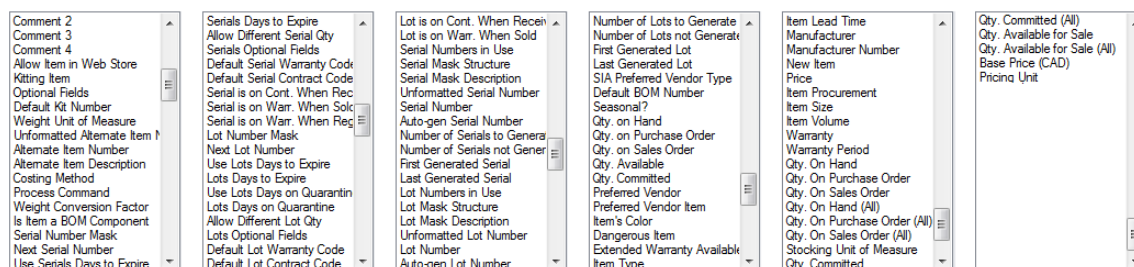
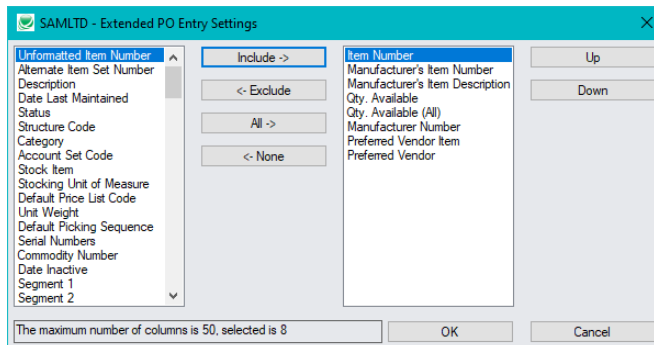


- The current columns that are displayed appear in the right-hand column.
- Highlight columns that you want to add in the left-hand column and click the Include button.

Note:

- **Settings apply to the currently selected tab.** For example, if you want to change the columns on the Manufacturer's Item Number tab, choose the tab first, and then select File > Settings.
- Only the "Included Fields" are used for searching. For example, if you do not include the Comments 1 field, the program will not scan the comments. Also note, that the number of fields will affect performance. If search is slow, remove columns that you don't need.

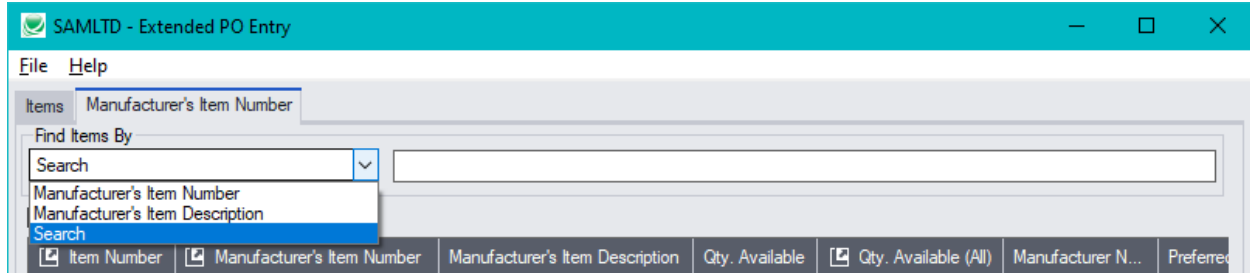
All of the possible columns are shown below. Note that optional and calculated fields are also available for inclusion – for example Item's Color and Qty. Available for Sale.



Searching for Items on the Manufacturer's Item Numbers Tab

Note: The Manufacturer's Item Number tab will *not* appear unless you have a license for the Enterprise version of Productivity Tools.

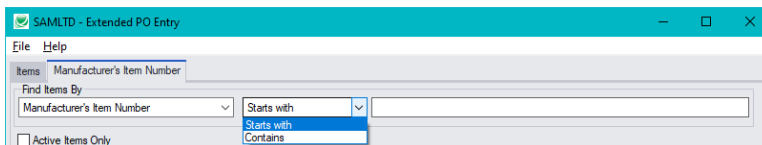
Search for manufacturer's item numbers is a Productivity Tools Enterprise feature.



- The Manufacturer's Item Number Finder appears with "Search" selected by default. This is the most common way to look up items by manufacturer's item numbers.
 - Type a partial item description or item number in the text field, optionally select Active Items Only, and press Enter to immediately search for manufacturer's item numbers.
- Alternatively, select "Manufacturer's Item Number" or "Manufacturer's Item Description" for searching.

The Item Finder on the Manufacturer's Item Number tab provides 3 search options:

- **Search** (most common option) – to search for words or word fragments in manufacturer's item text fields (the manufacturer's item number or the manufacturer's item description).
This search works like the PO Number and Vendor Number SmartFinders.
- **Manufacturer's Item Number** – to select items using part of the manufacturer's item number.



You can specify that the item number starts with or contains the string that you enter.

- **Manufacturer's Item Description** – to select items using part of the manufacturer's item description. As with the item number, you can specify that the item description starts with or contains the string that you enter.

Note that the "Search" choice automatically looks in the manufacturer's item number and the manufacturer's item description fields.

Vendor Inquiry

Vendor Inquiry button displays the TaiRox Productivity Tools Vendor Inquiry screen – a convenient way to view data related to the vendor. Each tab focuses on an aspect of the vendor's data.

You can also look up details for other vendors while you are on this screen.

The screenshot shows the 'PTDEMO - Vendor Inquiry' window. At the top, there is a search bar with 'PO Number' and 'NEW' buttons, and a 'Vendor Number' field with '1580'. A red arrow points from the search bar to the main form. The main form has tabs for 'Profile', 'Address', 'Comments', 'Optional Rds.', 'Remit-To', 'Recur. Payables', 'Activity', 'Documents', 'Payments', and 'Adjustments'. The 'Profile' tab is selected, showing fields for 'Short Name' (GRANT), 'Legal Name', 'Group Code' (INV), 'Account Set' (USA), 'Rate Type' (SP), 'Bank Code' (SEATAC), 'Payment Code' (CHECKUSD), 'Check Language', 'Delivery Method' (Mail), 'Terms' (DUETBL), 'Retainage Terms', 'Retainage %' (0.00000), 'Retention Period' (0), and 'Tax Group' (CALIF). Below these fields is a table for 'Tax Authority' with columns for 'Authority Descri...', 'Tax Class', 'Class Description', 'Registration Number', and 'Tax Included'. The table shows two rows: 'STATE' with 'State Tax' and '1 Taxable item', and 'COUNTY' with 'County Tax' and '1 Taxable merchandise'. At the bottom, there is a 'Vendor Account Status' section with fields for 'Outstanding Balance' (1,123,641.50), 'Prepayment Amount' (0.00), 'Outstanding Retainage' (0.00), 'Credit Limit' (1,000.00), 'No. of Open Invoices' (6), and 'No. of Prepayments' (0). Buttons for 'Refresh' and 'Close' are at the bottom.

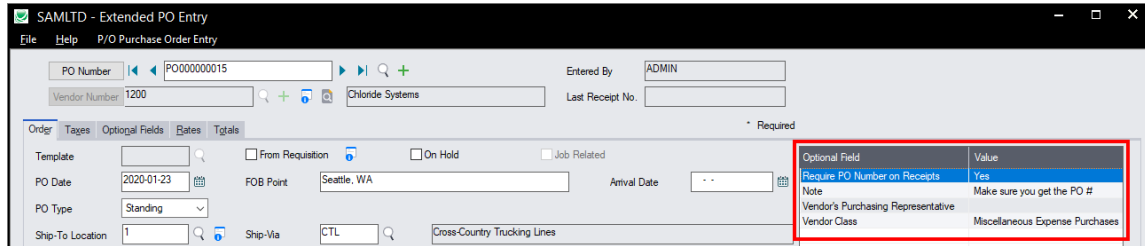
Tax Authority	Authority Descri...	Tax Class	Class Description	Registration Number	Tax Included
STATE	State Tax	1	Taxable item		No
COUNTY	County Tax	1	Taxable merchandise		No

Vendor Account Status	
Outstanding Balance	1,123,641.50
Prepayment Amount	0.00
Outstanding Retainage	0.00
Credit Limit	1,000.00

Vendor Account Status	
No. of Open Invoices	6
No. of Prepayments	0

Vendor Optional Fields

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/P vendor record on the right side of the Extended PO Entry screen.



Optional Field	Value
Require PO Number on Receipts	Yes
Note	Make sure you get the PO #
Vendor's Purchasing Representative	Miscellaneous Expense Purchases
Vendor Class	Miscellaneous Expense Purchases

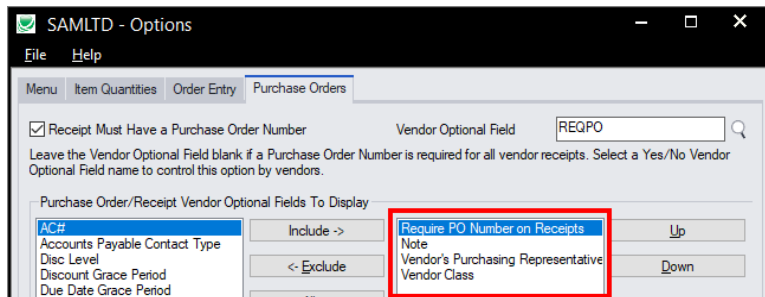
This lets you view notes concerning the account during data entry, and also view PO requirements.

You specify which optional fields to display on the Extended PO Entry screen using the Productivity Tools Options program.

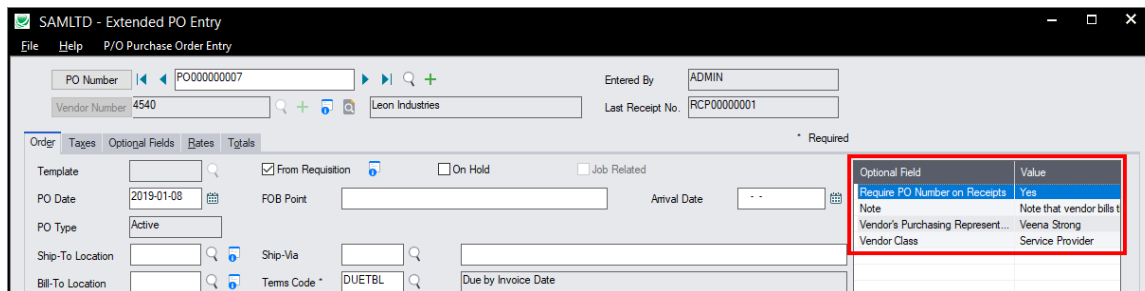
Setting Up Optional Fields on the Extended PO Entry Screen

You choose the vendor optional fields to display on the Extended PO Entry screen and Extended PO Receipt Entry screen using the Productivity Tools Options program on the Sage 300 Desktop.

The following example shows the vendor optional fields that will appear on the Extended PO Entry screen.



Purchase Order/Receipt Vendor Optional Fields To Display	Action
Require PO Number on Receipts	Include ->
Note	
Vendor's Purchasing Representative	
Vendor Class	



Optional Field	Value
Require PO Number on Receipts	Yes
Note	Note that vendor bills t
Vendor's Purchasing Representative	Veena Strong
Vendor Class	Service Provider

Quantities Displayed on the Extended PO Entry screen

Extended PO Entry displays item quantities for the selected location and item at the bottom of the PO Entry window – like the quantities displayed on the Sage Order Entry screen.

The program also provides drill-down links for quantities on sales order, quantities on purchase order, and committed quantities.

Note that the screen below shows the single location displayed for the current line item in the grid, as well as a total for all locations.

You can change the display to include item quantities for multiple locations in multiple companies.

SAMLTD - Extended PO Entry

File Help P/O Purchase Order Entry

PO Number: PO000000015 Entered By: ADMIN

Vendor Number: 1200 Last Receipt No.:

Chloride Systems

Order Taxes Optional Fields Rates Totals

Template: From Requisition On Hold Job Related

PO Date: 2020-01-23 FOB Point: Seattle, WA Arrival Date: - -

PO Type: Standing

Ship-To Location: 1 Ship-Via: CTL Cross-Country Trucking Lines

Bill-To Location: 1 Terms Code: N30 Net 30 Days

Vendor Acct. Set: USA Accounts payable, Other

Description: Standing order for Ms. Adams Reference: Jan 2010 PO

Lin...	Completed	Q	Item Number	Item Description	Q	Location	Drop-Ship	Quantity Ordered	Q	Unit of Measure	Q	Unit Cost	Extended Cost	Discount %	Discount Amount
1	No		A1-103/0	Fluorescent Desk Lamp	1		No	15	Ea			19.990000	299.85	0.00000	0.00
2	No		A1-105/0	13W Mini Fluorescent Bulb	4		No	20	Ea			3.350000	67.00	0.00000	0.00

Item/Tax... Calc. Taxes Consolidate Set Arrival Date Set Location Update... Item Finder... Drop Ship... Line Finder... 366.85 USD

Post Delete History... Purchase From History... Prepayments... Close

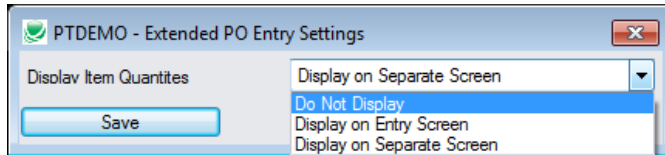
	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	137	15	250	0	137
All Locations (Ea.)	657	84	426	0	657

Displaying Quantities for multiple locations and companies

Extended PO Entry can also display item quantities available at other locations – either at the bottom of the Extended PO Entry screen or in a separate window.

To display quantities for multiple locations and companies:

- Select the **Extended PO Entry > File > Settings** menu choice to change the Item Quantities display settings.



- **Do Not Display** – shows only total quantities and quantities for the current line item location.

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location 2 (Ea.)	262	9	0	0	262
All Locations (Ea.)	657	23	276	0	657

- **Display on Entry Screen** – includes a new grid at the bottom of the screen that displays quantities at all locations, in the current company and any associated companies.

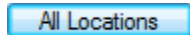
		Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location (Ea.)		0	0	0	0	0
All Locations (Ea.)		657	23	276	0	657

Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purchase Order
SAMINC	Sample Compan...	1	Central warehou...	A1-103/0	Fluorescent Des...	Ea.	137	
SAMINC	Sample Compan...	2	Portland Office	A1-103/0	Fluorescent Des...	Ea.	262	

- **Display on Separate Screen** – displays the item quantities at all locations in a separate window. (The image below shows the window widened to display most of the quantity columns.)

Database ID	Name	Location	Description	Item Number	Description	Shipping Unit	Qty. On Hand	Qty. On Pch.	Qty. On Sales O.	Qty. Available	Qty. Committed	Qty. Available To	Qty. On Hand (B)	Qty. On Pch (B)	Qty. On Sales O.	Qty. Available (B)
SAMTLO	Samco Company Limited	1	Central warehouse	A1-103-0	Fluorescent Des. Ea	137	250	16	137	0	137	657	436	34	567	657
SAMINC	Sample Company Inc.	1	Central warehouse	A1-103-0	Fluorescent Des. Ea	137	310	1	137	0	136	657	486	32	657	657
SAMINC	Sample Company Inc.	2	Portland Office	A1-103-0	Fluorescent Des. Ea	262	50	21	262	0	241	657	486	32	657	657
SAMTLO	Sample Company Limited	2	Portland Office	A1-103-0	Fluorescent Des. Ea	262	50	9	262	0	253	657	426	34	637	637

Click the All Locations button to move the Quantities in front of other windows (if hidden).



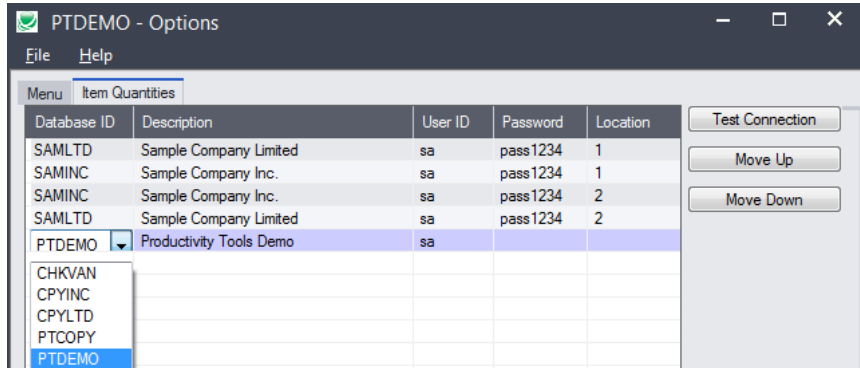
The All Locations button appears at the bottom of the Extended PO Entry screen if you choose to display quantities on a separate screen.

Item Quantities will be refreshed as you move to other detail lines.

Selecting which companies and locations are displayed

An administrator must first set up the Sage 300 company databases and locations that are displayed in the Item Quantities grid.

- Go to **TaiRox Productivity Tools > Options**, and click the Item Quantities tab.

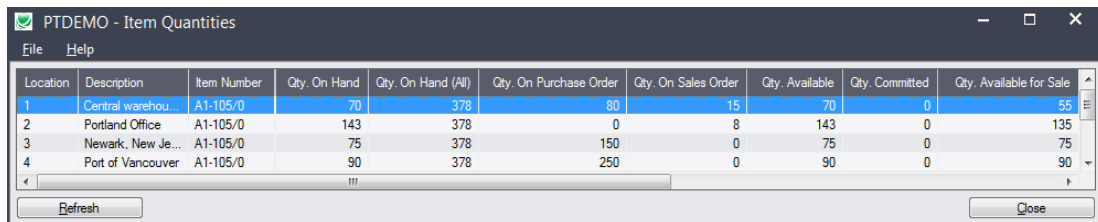


- Use the Insert and Delete keys to add or remove locations and companies from the Item Quantities grid and to change the order that locations appear.

Each user can customize the item quantities grid by hiding and moving columns to suit their own needs.

For example:

- You can hide the Database ID and Name columns if all locations are in the same Sage 300 company.
- You can also hide the Item Description and Stocking Unit if these are the same at all locations. Hide and re-arrange columns by dragging and dropping.



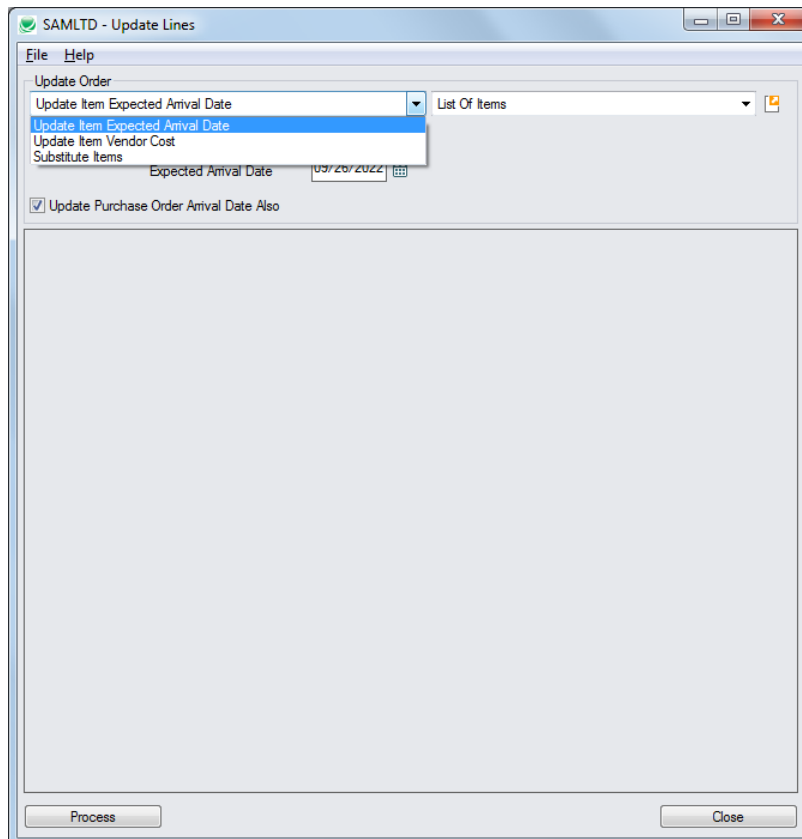
Updating Purchase Order Lines

The Extended PO Entry Update window lets you update multiple item lines at a time.

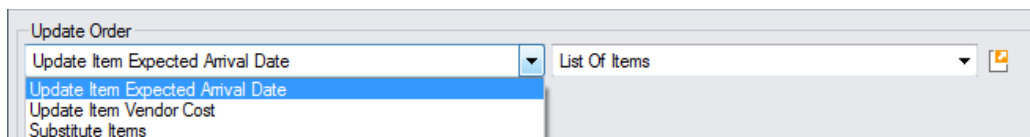
Click the Update button to display the Update Lines pop up window.

Update...

- The top portion of the form has the same options as the standard Update Purchase Orders form.
- The bottom of the form displays a log of item changes when the update is processed.



Choose what to update – expected item arrival date, item vendor cost, or substitute items:



You can select three types of updates:

- Update Item Expected Arrival Date
- Update Item Vendor Cost to match new costs in I/C Vendor Details
- Substitute Items

Updating the Item Expected Arrival Date

Update Order

Update Item Expected Arrival Date Specific Item

Item Number: A1-103/0 Fluorescent Desk Lamp

Expected Arrival Date: 09/26/2022

☒ Update Purchase Order Arrival Date Also

- Specify the new Expected Arrival Date. The above screenshot shows the date update for a specific item.
- Select “Update Purchase Order Arrival Date Also” to update the Arrival Date for the complete purchase order as well.

Updating the Item Vendor Cost

The program updates the vendor costs on the PO with the costs stored in I/C Vendor Details.

Update Order

Update Item Vendor Cost Specific Item

Item Number: A1-103/0 Fluorescent Desk Lamp

- Specify an item number, list of item numbers, or all items.
- The program will update the vendor costs from I/C Vendor Details.

Substituting Items

Note: The program will not substitute items for a completed or partially shipped line, or for lines that have an Order Entry order number reference.

Also, we suggest you take care when substituting non-inventory items due to issues with units of measure and UOM conversion factors with non-inventory items. We suggest you use the stocking units of measure – if both are the same, you will not have an issue. Make sure to check the units of measure and extended costs for all substituted items when processing is finished.

SAMLTD - Update Lines

File Help

Update Order: Substitute Items List Of Items

☐ Retain Existing Line Item Unit Cost

SAMLTD - Extended PO Entry

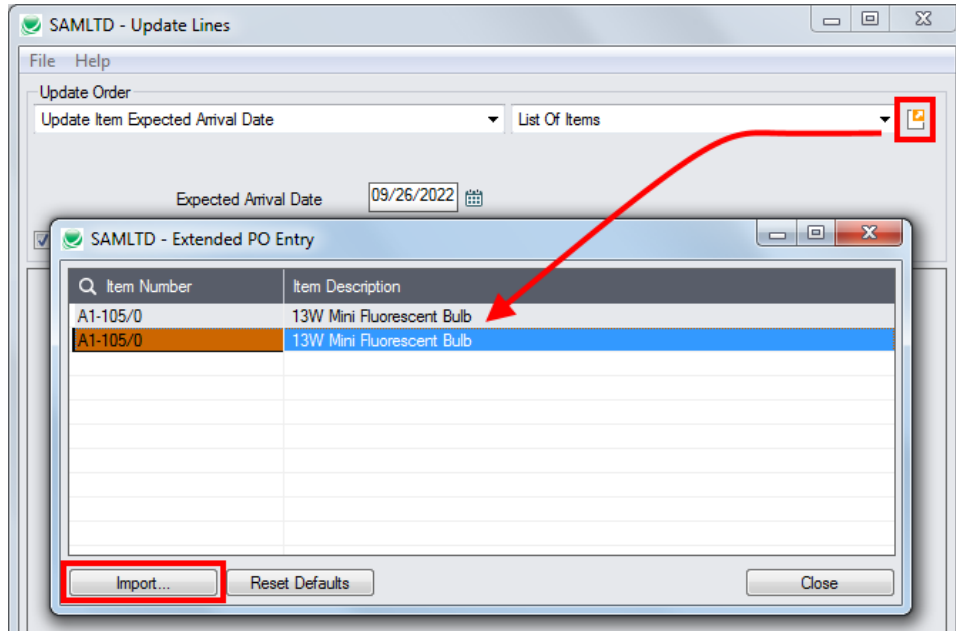
From Item Number	Item Description	To Item Number	Item Description
A1-103/0	Fluorescent Desk Lamp	A1-310/0	Halogen Desk Light

- Select Substitute Items from the dropdown list.
- To specify the substitute items list, click the Zoom button beside the dropdown, and add “From” items and “To” items to the list in the form that appears.
 - Use the Finder to look up items. Use the Insert key to add new empty lines.
- Choose whether you want to “Retain Existing Line Item Unit Price.”

Choose a single item, list of items, or all items:

If updating the expected arrival date or the vendor cost, you can choose to specify a single item, all items, or a list of items. If you select "Substitute Items", you must use the item list popup to specify the item or items that you want to substitute.

- If you use the list popup form to specify a list of items, the list will be remembered from the previous time you used it to update a PO.
- To create/edit an item list. click on the Drill Down icon on the right side of the dropdown field.



To insert items:

- Use the Insert key to add more items to the list.
- Use the Delete key to remove items.
- The list will be remembered from the previous time you used it to update orders.
- Click the Reset Defaults button to delete all items from the list.

To import a list of items or item substitutions:

- Click the Import button at the bottom of the popup form and select the spreadsheet containing the item list.
 - The imported list will replace the current list of items.
- Use the Insert key to add more rows to the list.
- Use the Delete key to remove items from the imported list.
- Click the Reset Defaults button to delete all items from the list.

Import format:

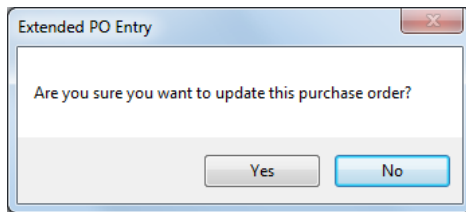
You can find sample import files in directory \Sage300\XL61A\Documentation.

Note: The Excel Spreadsheet for an item list (Items.xlsx) is a single column with "ITEMNO" as the column heading in the first row.

	A
1	ITEMNO
2	A11030
3	A11050

Click the Process button to update purchase orders

Click the Process button at the bottom of the screen to update purchase orders. The program will display progress messages as it updates lines and tell you when it is finished.



Depending on your permissions, you may need to have price changes for items approved by a supervisor.

Using the Extended Drop Ship window

The Extended PO Entry Drop Ship window lets you set the drop-ship column for multiple PO detail lines at once to “Yes” and assign them all the same drop ship address, rather than double-clicking the column and assigning addresses one at a time using the Drop Ship column heading zoom button. This is very useful if you have a large PO with multiple items drop shipped to multiple customers.

Click the Drop Ship button to display the Drop Ship pop up window.

Drop Ship..

- The top portion of the form is the same as the standard Drop Ship form.
- The grid at the bottom displays the Purchase detail lines.

Include	Line	Item Number	Item Description	Location	Drop-Ship	Quantity Ordered
No	1	D1-608/B	Double Pedestal 71in X ...	1	Yes	1
No	2	C1-250/R	Krugg 250 Arm Titer-Rust	1	Yes	1
No	3	C2-230/G	2300 Series Posture Chair	1	Yes	1
No	4	D2-613/B	Single Pedestal 60in X 3...	1	Yes	1
No	5	F1-265/B	Filing Cabinet - 2 Drawers	1	Yes	2

To set the drop ship column to “Yes” and set the address for multiple items:

- Click the Drop Ship button to display the Drop Ship form.

Drop Ship..

Choose the first drop ship address and items

- Pick a shipment address.
- Double-click the Include column (select “Yes”) for each item that you want to drop ship to the selected address.
- Click the Drop Ship button on the form to update the items in the PO detail grid as drop-shipped order lines with the selected address.

Choose the second drop ship address and items

- Select another shipment address to drop ship other items on the PO to a different location.
- Double-click the Include column (select “Yes”) for each item that you want to drop ship to the new address.
- Click the Drop Ship button on the form to update the PO entry window with the selected address.
- Press Cancel when done to return to the main PO entry window.

Using the Line Finder

The Extended PO Entry Line Finder window lets you quickly find any PO detail line in a large order by item number, location, order number, or vendor item number.

Click the Line Finder button to display the Line Finder pop up window.

Line Finder...

- Choose the order to display PO items in the Line Finder.
You can list items by item number, location, vendor item number, or order number. The example below displays lines by item number.
- Choose the selection criteria for displaying PO items in the Line Finder.
You can select items by item number, location, vendor item number, or order number. The example below selects item lines using a range of item numbers and the location.
- Click the Load button to display the selected lines.
- Double-click the line you want to view, or highlight the line and click the Select button at the bottom of the screen.

SAMLTD - Purchase Order Lines

File Help

Order By

Select Order By

Item Number

(None)

(None)

Select Items By

Item Number

Location

(None)

Item Number

Contains

From

To

A1-300/0

A1-400/0

2

2

Load

Line Number	Item Number	Item Description	Location	Quantity Ordered	Unit of Meas...	Unit Cost	Extended Cost	Disc
23	A1-310/0	Halogen Desk Light	2	25.0000	Ea	23.500000	587.50	0
21	A1-320/0	50W/12V Halogen Bulb	2	30.0000	Ea	3.390000	101.70	0
25	A1-400/0	Desk Note Book	2	50.0000	Ea	7.250000	362.50	0

Qty. On Hand Qty. On Sales Order Qty. On Purchase Order Qty. Committed Qty. Available

Location 2 (Ea.) 165 0 25 0 165

All Locations (Ea.) 443 52 815 0 443

Select Close

Purchasing from History

The Purchase from History window lets you quickly create new purchase orders for a vendor based on previous vendor purchases.

Using Purchase from History also tends to consolidate multiple orders into single, larger orders, resulting in lower shipping costs, increased discounts and other operational efficiencies.

Click the Purchase From History button to display the pop up window.

[Purchase From History...](#)

- The Purchase Orders tab lets you apply selection criteria and then press the Load button to request previous purchase orders.
- The Purchase History tab is similar, but lets you select using item criteria rather than order criteria.

To create a new PO from prior ones using the Purchase Orders tab

- Use the Purchase Order range fields to select past POs for the vendor, and then click the Load button. In this case, we've chosen purchase orders since January 1, 2019. (You can add or remove fields from the range field dropdown lists using the [Field Settings](#) button – see below.)

- Click the purchase orders lines to see the PO details in the bottom grid.

- Click the Select All and Select None buttons to include all or none of the items in the previous purchase order.
- Double-click the Include column to select individual lines (the Include column displays Yes).

Line Num...	Include	Include Comments	Include Instructions	Item Number	Item Description	Location	Order UOM	Quantity Or
1	Yes	No	No	A1-400/0	Desk Note Book	4	Ea.	
2	No	No	No	A1-401/0	Desk Calendar ...	4	Ea.	
3	Yes	No	No	A1-450/0	Bulletin Board	4	Ea.	
4	No	No	No	A1-470/0	Dry-erase White ...	4	Ea.	
5	No	No	No	A1-650/0	Highlighter	4	Ea.	

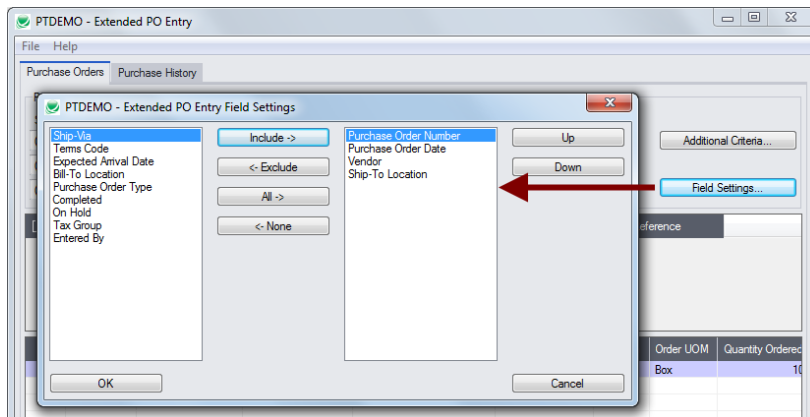
- Edit the **Qty. Ordered** column to change the quantities for the new purchase order that you are creating. (The Quantity Ordered field shows the quantities from the previous PO.)

Include Comments	Include Instructions	Item Number	Item Description	Location	Order UOM	Quantity Ordered	Qty. Ordered
No	No	A1-400/0	Desk Note Book	4	Ea.	200	0
No	No	A1-401/0	Desk Calendar ...	4	Ea.	200	0
No	Yes	A1-450/0	Bulletin Board	4	Ea.	200	15
No	No	A1-470/0	Dry-erase White ...	4	Ea.	200	0
No	No	A1-650/0	Highlighter	4	Ea.	500	0

- When you have finished the edits for items from this purchase order, click the Purchase button to add the items to the new PO.
- Select another purchase order from the top grid, choose the items that you want to order, enter the new quantities, and again click Purchase.
- Click the Close button when you have finished adding items from prior POs.

Use the “Field Settings” button to customize the list of fields for selecting POs:

Click the **Field Settings** button to change the fields that appear in the “Select Purchase Orders By” dropdown lists on the Purchase From History screen.



- The list of fields on the right are the fields that will appear in the Select Purchase Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

Using the Purchase History tab

The Purchase History tab allows a similar sequence of operations – selection, editing of quantities and copying to the purchase order.

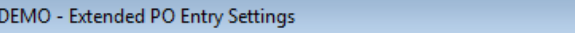
[illegible]

- Select the range of item numbers, invoices, or transaction dates that you want to use as search criteria, then click the Load button.
- See the steps listed above for including items from history on the new purchase order.

Setting default descriptions, comments and instructions for included items

You can select the default settings for taking descriptions, comments and instructions from the original purchase orders. You can also change the settings for each item as you select them.

- Select **File > Settings** from the Purchase From History screen.



PTDEMO - Extended PO Entry Settings

☐ Use description from selected line for detail description

☐ Include comments for each selected line

☐ Include instructions for each selected line

Save Cancel

- Select the checkboxes if you want them to be included by default from the original purchase orders.

Viewing Prepayments

The Prepayments window lets you quickly view any prepayments entered for the current vendor and purchase order.

Click the Prepayments button to display the pop up window.

Prepayments...

In the following example, the program displays a single prepayment that was entered in A/P and assigned to PO number "45" for Grant Office Supplies.

The screenshot shows the SAMLTD - Extended PO Entry window. The main window displays the PO Number PO000000045, Vendor Number 1580, and Vendor Name Grant Office Supplies. The Prepayments window is open, showing a table with one prepayment entry. A red arrow points from the 'Prepayments...' button in the main window to the Prepayments window. A red circle highlights the 'Total' and 'Amount Remaining' fields in the Prepayments window.

Description	Payment Date	Posting Date	Vendor	Currency Code	Vendor Remit-To Location	Vendor / Payee Name	Payment Amount	Amount Remaining	Balance
PO000000045	2022-05-10	2022-12-05	1580	USD		Grant Office Supplies	5,000.00	5,000.00	60

Total: 5,000.00
Amount Remaining: 5,000.00

The "Amount Remaining" indicates the amount of the prepayment that has not been applied to an invoice with a matching purchase order number.

Quick PJC Entry

To speed up data entry, Extended PO Entry will default inserted lines to the previous entry's selections for Contract, Project and Category when multiple lines use the same selections.

The following form shows how the order form appears immediately after pressing the Insert key to create the second line (with default values for the Contract, Project, Category and Cost Class fields):

SAMLTD - Extended PO Entry

File Help P/O Purchase Order Entry

PO Number: NEW Vendor Number: 1580 Grant Office Supplies Entered By: Last Receipt No:

Order: Tags: Optional Fields: Rates: Totals

Template: From Requisition: On Hold: Job Related: PO Date: 12/06/2022 FOB Point: Arrival Date: PO Type: Active Ship-To Location: Ship-Via: Bill-To Location: Terms Code: DUEBTL Due by Invoice Date: Vendor Acct. Set: USA Accounts payable, Other: Description: Reference:

Optional Field	Value	Description
Vendor Class	Miscellaneous Expense Purchases	Miscellaneous
Note	Discount on goods - not labour	
Disc Level	20%	

Completed	Contract	Project	Category	Cost Class	Item Number	Item Description	Location	Drop Ship	Quantity Ordered	Unit of Measure	Unit Cost
No	120-1200-10	1012	UPGRLABOR	Labor	100070	Embleton, Robert Wilson	1	No	10	HOUR	5.209
No	120-1200-10	1012	UPGRLABOR	Labor				No	0		0.000

Item/Tax: Calc. Taxes: Consolidate: Set Arrival Date: Set Location: Update: Item Finder: Drop Ship: Line Finder: Order Subtotal: 52.09 USD

Post: Delete: History: Purchase From History: Prepayments: Close

	Qty. On Hand	Qty. On Sales Order	Qty. On Purchase Order	Qty. Committed	Qty. Available
Location	0	0	0	0	0
All Locations	0	0	0	0	0