

Extended PO Invoice Entry

Extended PO Invoice Entry is an enhanced replacement for the Sage P/O Invoice Entry form that lets you:

- Quickly receive an invoice from a vendor that references many receipts.
 - The Multiple Receipts zoom pop-up shows all receipts related to a vendor, so you can quickly match them to an invoice.
 - A vendor is related to a receipt if they are the primary vendor or an additional cost vendor.
- Drill down to more information while entering an invoice and fast access to additional Receipt, Vendor, and Item information.

The following pictures show some of the extra features on the Extended PO Invoice Entry screen:

Sage P/O Invoice Entry screen

TaiRox Extended PO Invoice Entry screen

Click the following links for details on each Extended PO Invoice Entry feature:

[Multiple Receipts per Invoice](#) Quickly receive an invoice from a vendor that references many receipts.

[SmartFinder – Invoice Number](#) Finds invoices and shows invoice details quickly for any vendor.

[SmartFinder – Vendor Number](#) Find a vendor quickly from a name, description, phone number or an address.

[SmartFinder – Receipt Number](#) Find an item quickly from partial words.

SmartFinders provide fast, browser-like search capabilities to lookups on the PO Entry screen.

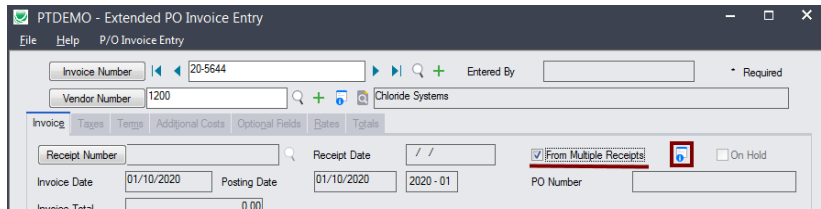
The SmartFinder searches more fields than the Finder and searches in all text fields at once.

For example, search for “Seattle” if you think that the vendor or contact is in Seattle.

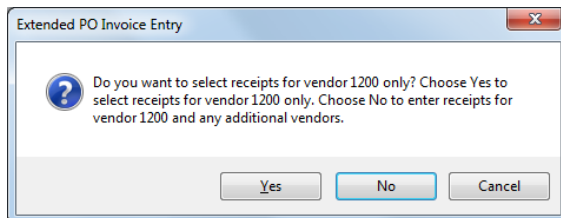
[Vendor Inquiry](#) (button left of the vendor name field) provides complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

Multiple Receipts per Invoice

- Select the From Multiple Receipts checkbox.
- Click the Zoom button (outlined below) to select receipts.

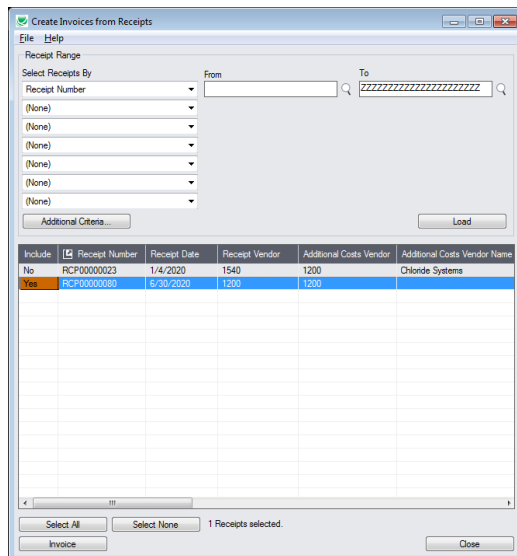


The program displays the following message to let you choose between the TaiRox receipt selection screen and the original Sage receipt selection screen.

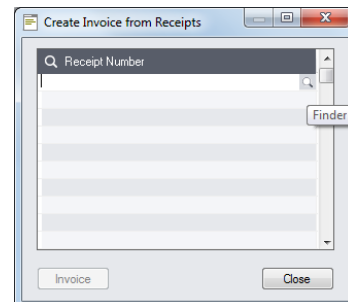


- Click Yes to use the TaiRox receipt selection screen – for faster and easier receipt selection. The TaiRox screen displays receipts that match the invoice vendor and additional cost vendors, and lets you drill down to view the original receipts.
- Click No to use the original Sage receipt selection screen – where you use the Finder to select invoices. The Sage receipt Finder lists all receipts.

TaiRox receipt selection




Standard Sage receipt selection



Using the TaiRox receipt selection screen

- Choose the criteria for listing receipts, then click the Load button. The program uses the last used search criteria by default. (Click the Load button when you change the criteria.)
- Double-click the Receipt number (or the click the column heading) to view a Receipt in the grid.
- Click the Select All and Select None buttons to include all or none of the receipts listed in the grid.
- Double-click the Include column to select individual receipts (the Include column displays Yes).

- The invoice may be either the primary vendor or an additional cost vendor. Both are shown.

Include	 Receipt Number	Receipt Date	Receipt Vendor	Additional Costs Vendor	Additional Costs Vendor Name
No	RCP00000023	1/4/2020	1540	1200	Chloride Systems
Yes	RCP00000080	6/30/2020	1200	1200	

Note: This example shows one receipt where vendor 1200 is an additional cost vendor.

- Click the Invoice button when you have selected the receipts that you want to invoice.
 - Click the Invoice button to include all selected receipts on the invoice.
 - Invoiced items will appear in the grid on Invoice tab.
 - Additional costs will appear on the Additional Costs tab.

SmartFinder – Invoices

Click the Invoice Number button to open the SmartFinder for searching invoices.

Invoice Number

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- 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.

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 an invoice 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 invoices matching the search criteria. Double-click to select an invoice.
- The bottom grid displays the details of the invoice 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.

PTDEMO - Extended PO Invoice Entry

File Help

Search: Hart Find

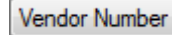
Invoice Number	Purchase Order ...	Receipt Number	Vendor	Name	Address 1	Address 2	Address 3
HB-867		RCP00000011	1540	Hart Batt...	3719 Colorado		
HB-993		RCP00000023	1540	Hart Batt...	3719 Colorado		
IN154114		RCP00000030	1540	Hart Batt...	3719 Colorado		
IN154124		RCP00000046	1540	Hart Batt...	3719 Colorado		
IN154134		RCP00000063	1540	Hart Batt...	3719 Colorado		

Item Number	Item Description	Location	Quantity Receiv...	Unit of Measure	Vendor Item Nu...	Order Number	Manufacturer's
A1-103/0	Fluorescent Des...	4	30	Ea.			
C1-500/B	High Back Arm ...	4	5	Ea.			
S1-200/B	Flat Screen 5'6 ...	4	3	Ea.			
A1-103/0	Fluorescent Des...	1	5	Ea.			

Select Cancel

SmartFinder – Vendors

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

A rectangular button with a thin border and the text "Vendor Number" in a sans-serif font.

Search:

- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- 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.

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.

PTDEMO - Extended PO Invoice Entry

File Help

Search: seattle Find

☐ Active Vendors Only

Vendor Number	Status	Vendor Name	Short Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
6010	Active	J. D. Garner Ent.	J. D. Garner	6609 Commercial			

Active Remit-To Locations Only

Vendor Number	Remit-To Location	Status	Description	Address Line 1	Address Line 2	Address Line 3	Address Line 4
1200	SEATAC	Active	Seattle Tacoma...	PO Box 13233	Tacoma Bay		
6010	SEATAC	Active	Seattle Tacoma...	PO Box 13790	Tacoma Bay		

Select Cancel

Selection:

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

SmartFinder – Receipts

Click the Receipt Number button to open the SmartFinder for Receipts. Receipt Number

- Enter one or more words or word fragments in the entry field to search multiple tables and fields, and then click the Find button.
- Search returns records which contain the search string in any of the searched fields.

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 an invoice 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 receipts matching the search criteria. Double-click to select a receipt.
- The bottom grid displays the item details of the receipt 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.

Receipt Number	Purchase Order ...	Invoice Number	Vendor	Name	Address 1	Address 2	Address 3
RCP00000011		HB-867	1540	Hart Batteries	3719 Colorado		
RCP00000023		HB-993	1540	Hart Batteries	3719 Colorado		
RCP00000030		IN154114	1540	Hart Batteries	3719 Colorado		
RCP00000046		IN154124	1540	Hart Batteries	3719 Colorado		
RCP00000063		IN154134	1540	Hart Batteries	3719 Colorado		

Item Number	Item Description	Location	Ordered Quantit...	Unit of Measure	Vendor Item Nu...	Order Number	Manufacturer's
A1-103/0	Fluorescent Des...	4	30	Ea.			
C1-500/B	High Back Arm ...	4	5	Ea.			
S1-200/B	Flat Screen 5'6 ...	4	3	Ea.			
A1-103/0	Fluorescent Des...	1	5	Ea.			

Selection:

- Double-click a receipt in the top grid to select the receipt and enter the receipt details on the invoice.

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' application window. At the top, there is a search bar with 'Invoice Number' set to 'IN158115' and 'Vendor Number' set to '1580'. The vendor name 'Grant Office Supplies' is displayed. A red arrow points from the search bar area down to the 'Vendor Inquiry' window. The window has a menu bar with 'File', 'Settings', and 'Help'. Below the menu bar is a search bar with 'Vendor No.' set to '1580' and 'Grant Office Supplies' selected. The window is divided into several tabs: 'Pending', 'Requisitions', 'POs', 'PO Receipts', 'PO Invoices', 'PO Returns', 'PO CR/DR', 'Purchases', 'Aging', and 'Items'. The 'Profile' tab is active, showing various fields for the vendor's information. A table at the bottom shows tax authority details, and a section at the bottom right shows vendor account status.

PTDEMO - Vendor Inquiry

File Settings Help

Vendor No. 1580 Grant Office Supplies Vendor Currency

Pending Requisitions POs PO Receipts PO Invoices PO Returns PO CR/DR Purchases Aging Items

Profile Address Comments Optional Fds. Remit-To Recur. Payables Activity Documents Payments Adjustments

Short Name GRANT Start Date 05/09/1995

Legal Name Last Maintained 08/18/2010

Group Code INV Inventory Purchases ☐ Active

Account Set USA Accounts payable, Other ☐ On Hold

Rate Type SP

Bank Code SEATAC Seattle Tacoma Bank

Payment Code CHECKUSD USD check Seattle Tacoma Bank

Check Language

Delivery Method Mail

Terms DUETBL Due by Invoice Date

Retainage Terms

Retainage % 0.00000

Retention Period 0

Tax Group CALIF California State Tax Group

Tax Authority	Authority Descr...	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 No. of Open Invoices 6

Prepayment Amount 0.00 No. of Prepayments 0

Outstanding Retainage 0.00

Credit Limit 1,000.00

Refresh Close