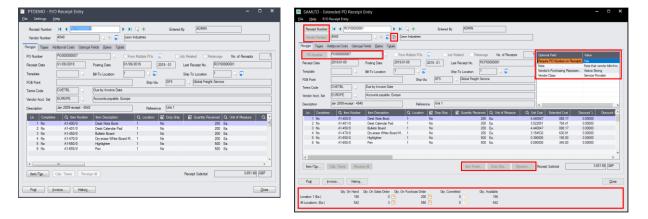
Extended PO Receipt Entry

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

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

Sage P/O Receipt Entry screen

TaiRox Extended PO Receipt Entry screen



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

<u>SmartFinder – Receipts</u> Finds purchase orders and shows PO details quickly for any vendor. <u>SmartFinder – Vendors</u> Find a vendor quickly from a name, description, phone number or an address.

<u>SmartFinder – Purchase Orders</u> Finds purchase orders and shows PO details quickly for any vendor. <u>SmartFinder – Items</u> 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 Receipt 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.

<u>Vendor Inquiry</u> (button left of the vendor name field) provides complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

<u>Vendor Optional Fields</u> Display any vendor optional fields on the Extended PO Receipt Entry screen. <u>Require PO Number</u> Optionally require purchase order numbers on receipts for all or selected vendors.

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.

<u>Item Quantities at Other Locations</u> Display quantities available at other locations or in other companies while entering a purchase order.

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

<u>Receive in Sorted Order</u> (Receive button) Receive items by item Number or several other selectable orders.

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

SmartFinder – Receipts

Click the Receipt Number button at the top of the screen to open the SmartFinder. 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 an 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.

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earch	hart						Find
Receipt Number	Purchase Order	Invoice Number	Vendor	Name	🖃 Address 1	Address 2	Address 3
RCP00000011		HB-867	1540	Hart Batteries	3719 Colorado		
RCP0000023		HB-993	1540	Hart Batteries	3719 Colorado		
RCP0000030		IN154114	1540	Hart Batteries	3719 Colorado		
RCP00000046		IN154124	1540	Hart Batteries	3719 Colorado		
RCP0000063		IN154134	1540	Hart Batteries	3719 Colorado		
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tem Number	Item Description	Location	Ordered Quantit	Unit of Measure	Vendor Item Nu	Order Number	Manufactu
	Item Description		Ordered Quantit 300	Unit of Measure	Vendor Item Nu	Order Number	Manufactu
ltem Number					Vendor Item Nu	Order Number	Manufactu
Item Number A1-103/0	Fluorescent Des	4 4	300	Ea.	Vendor Item Nu	Order Number	Manufactu
Item Number A1-103/0 C1-500/B	Fluorescent Des High Back Arm	4 4	300 48	Ea. Ea.	Vendor Item Nu	Order Number	Manufactu
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Item Number A1-103/0 C1-500/B	Fluorescent Des High Back Arm	4 4	300 48	Ea. Ea.	Vendor tem Nu	Order Number	Manufactu

Selection:

• Double-click a receipt in the top grid to select the receipt and display the receipt details on the screen.

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.

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.

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Active Ve	ndors Only				-		
Vendor Nur		Vendor Name	Short Name	🖃 Address Lin	Address Line 2	Address Line 3	Address Lin
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Active Re /endor Nur 1200	mit-To Locations Only nber Remit-To Locati. SEATAC	Status Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3	
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Active Re /endor Nur 1200	mit-To Locations Only nber Remit-To Locati. SEATAC	Status Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3	Address Lin

Selection:

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

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, and click the Find button. (Note that you must entry a criterion such as "a" to search.)
- 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.

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 for the vendor that match 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.

	leon						
earch							Find
urchase Order Type	All	 Incl 	ude Completed Purcha	ise Orders	Include Purchase	Orders on Hold	
Purchase Order	Purchase Order	Vendor	Name	🖪 Address 1	Address 2	Address 3	Address 4
PO00000007	Active	4540	Leon Industries				
PO00000008	Active	4540	Leon Industries				
PO00000009	Active	4540	Leon Industries				
PO000000010	Active	4540	Leon Industries	342 Central Par	ĸ		
(_						
			1	1	1		1
tem Number	Item Description		Location	Quantity Ordered	Unit of Measure	Vendor Item Nu	Expected Arriva
A1-400/0	Desk Note Book		1	200	Ea.		1/13/2019
A1-401/0	Desk Calendar Pad		1	200	Ea.		1/13/2019
A1-450/0	Bulletin Board		1	200	Ea.		1/13/2019
A1-470/0	Dry-erase White Bo	ard Markers	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
<		III					

SmartFinder – Items

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

SAMLTD - Extended PO Receipt Entry	
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Vendor Number 1500 Q + 🔓 🗿 Grant Office Supples	
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PO Number PO00000045 Q From Matple POs 🔂 Jab Related Returnings No. of Recepts 0 Doctored Re-	vol Field Volue
Receipt Date 2024-05-07 (1) Posting Date 2024-05-07 (1) 2024-05 Last Receipt No. Note	re PO Number on Delete and S.
Terevisite Bit Talenston 2 Statute Vendor's Pa	o's Purchasing Representative
FOB Part Step-Va CTL C Does County Trucking Lines Vender Car	<i>4</i> Class
Terms Code * DUETBL Q Due by Invoice Date	
Vendor Acct. Set * USA Q Accounts payable. Other	
Description Items for Back - 2024/25 Reference	
Number hen Description Q, Locaton D, Drap-Drip D, Quantity Received Q, Lint of Measure Q, Lint Cost Extended Cost Decourt 1	
B Stapler-Kings 5000 Series 1 Yes 0 Ea. 12.000000 0.00 0.0000	
Ref Somen 96 H + 5W 1 Yes 0 Ea. 62,00300 0.00 0,0000 Curved Somen 5H + 6W 1 Yes 0 Ea. 75,00000 0.00 0,0000	
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ten/Tgr., Caji: Taxes Receipt Al	0.000 USD
Pog pwsice Hatay	Cross
Oty. On Hand Oty. On Sales Order Oty. On Purchase Order Oty. Committed Oty. Available	
Loosten 1 (Ea) 6 131 1 12 12 0 6 6 Al Locatore (Ea) 2 131 1 12 120 0 2 2	
Database ID Name Loation Decoglion Item Number Decoglion Stocking Life Ory On Hand Ory On Punchs, 1 SAMINC Service Concern, 1 Central warehou, A1751/B Stocker Knop 5, Ea. 0 0	. Oxy On Sales D. Oxy Available Oxy A
SAMINC Sample Compan. 2 Portand Office A1751/8 Stapler-Wrste-Ea. 3 0	
¢	

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 and searched.

SAMLTD - Extended PO Receipt Entry				-		×
<u>F</u> ile <u>H</u> elp						
Items Manufacturer's Item Number						
Find Items By Search ~						
Location 2	Portland C	Office				
Active Items Only						
🖪 Item Number Description	Status	Comment 1	Structure Code	Category	Stock Iter	m

- 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.

SAMLTD - Extended PO Receipt Entry		– 🗆 🗙
<u>F</u> ile <u>H</u> elp		
Items Manufacturer's Item Number Find Items By Show All Records V		
	From To A1-105/0 Q D1-000	Q
(None) ~		
(None) ~		
(None) ~		
Additional Criteria		Reset Defaults
Location 2	Portland Office	

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:

	👳 SAMLTD - Extended PO Receipt Entry				-		×
1	ile <u>H</u> elp						
Γ	Items Manufacturer's Item Number						
	Find Items By						
	Search 🗸						
	Show All Records						
	Item Number Description	Portland C	Office				
	Structure Code						
	Category						
	Account Set Code	Status	Comment 1	Structure Code	Category	Stock It	em
	Search						

- 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.

SAMLTD - Extended PO Receipt Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Item Number V Starts with V		
Starts with		
Item Range		

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 all displayed 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 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):

SAMLTD - Extended PO Receipt Entry	-	×
<u>File</u> <u>H</u> elp		
Items Manufacturer's Item Number		
Find Items By		
Search ~		
Location 2 Portland Office		 _
Active Items Only		

- 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 <u>displayed</u> 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.

Find Items By Search		desk lam				
cation 2		Portland	Office			
Active Items On						
Item Number	Description	Status	Comment 1	Structure Code	Category	Stock Item
A1-103/0	Fluorescent Desk Lamp	Active	Comes with stand and mounting bracket for wall or	STD	A1	Yes
_						

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.

File Help Close ber Settings Admade tem Set Number Delptipuintrained Sature Sature Code Constructed tem Number Sature Code Sature Code Stock tem Sorking Unit of Measure Constructed tem Number Delptipuintrained Sature Stock tem Sorking Unit of Measure Constructer Number Default Processory Code Stock tem Sorking Unit of Measure Default Processory Default Processory Code Default Processory <
The maximum number of columns is 50, selected is 8 OK Cancel

- 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.

SAMLTD - Extended PO Ent	ry Settings		×			
Unformatted Item Number	Include ->	Item Number Manufacturer's Item Number	Up			
Description Date Last Maintained	<- Exclude	Manufacturer's Item Description Qty. Available	Down			
Status Structure Code Category	All ->	Qty. Available (All) Manufacturer Number Preferred Vendor Item				
Account Set Code Stock Item Stocking Unit of Measure Default Price List Code	<- None	Preferred Vendor Preferred Vendor				
Unit Weight Default Picking Sequence Serial Numbers						
Commodity Number Date Inactive Segment 1 Segment 2						
The maximum number of columns is	s 50, selected is 8	ОК	Cancel			
Comment 2	Serials Days to Expire Allow Different Serial Qt Serials Optional Fields	y Lot is on Cont. When Lot is on War. When Serial Numbers in Us	n Sold Number of	Lots to Generate A Lots not Generate	Item Lead Time	Qty. Committed (All) Qty. Available for Sale Qty. Available for Sale (All)
Allow Item in Web Store Kitting Item Optional Fields	Default Serial Warranty Default Serial Contract Serial is on Cont. When	Code Serial Mask Structum Code Serial Mask Descript Rec Unformatted Serial N	e Last Gener ion SIA Preferr	rated Lot red Vendor Type M Number	Nanuracturer Number New Item Price Item Procurement Item Size	Base Price (CAD) Pricing Unit
Default Kit Number Weight Unit of Measure Unformatted Alternate Item N Alternate Item Number Alternate Item Description	Serial is on Warr. When Serial is on Warr. When Lot Number Mask Next Lot Number Use Lots Days to Expire	Auto-gen Serial Num Number of Serials to Number of Serials no	ber Qty. on Hai Genera Qty. on Pur t Gener = Qty. on Sal	nd rchase Order les Order	Item Size Item Volume Warranty Warranty Period Qty. On Hand	
Costing Method Process Command Weight Conversion Factor Is Item a BOM Component	Lots Days to Expire Use Lots Days on Quar Lots Days on Quarantin Allow Different Lot Qty	e Lot Mask Structure Lot Mask Description	Preferred V Preferred V Item's Colo	/endor /endor Item r	Qty. On Purchase Order Qty. On Sales Order Qty. On Hand (All) Qty. On Purchase Order (All)	
Serial Number Mask Next Serial Number Use Serials Days to Expire 🔻	Lots Optional Fields Default Lot Warranty Co Default Lot Contract Co		Extended V	ः Item Warranty Available रू	Qty. On Sales Order (All) Stocking Unit of Measure Qty. Committed	_

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 <u>Enterprise</u> feature.

SAMLTD - Extended PO Receipt Entry	-		×
<u>F</u> ile <u>H</u> elp			
Items Manufacturer's Item Number			
Find Items By			
Manufacturer's Item Number Manufacturer's Item Description			
Search			
🖆 Item Number 📔 Manufacturer's Item Number 🛛 Manufacturer's Item Description 🛛 Qty. Available 🛛 🖆 Qty. Available (All) 🛛 Manu	ufacturer N	N Pr	eferrec

- 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.

💌 SAMLTD - Extended PO Receipt Entry		-	×
<u>File</u> <u>H</u> elp			
Items Manufacturer's Item Number			
Find Items By			
Manufacturer's Item Number V	Starts with 🗸		
Active Items Only	Starts with Contains		

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.

Receipt Numbe	er 🛛 🖌 🗖	CP00000046	•	▶ Q +	Enter	ed By	ADMIN	
Vendor Numbe	er 1580		् + 🗟 🖸	Grant Office Su	pplies			
Eile Settings			Grant Office Supplies			 endor Currenc		
			ices PO Returns PO CR/ Recur. Payables Activity					
Short Name	GRANT		Autoria Autoria	o o canona i ayilleli	Start Date	05/0	09/1995	
Legal Name		1			Last Maint	ained 08/1	18/2010	
Group Code	INV	Inventory Purch	ases		Active	1	/	
Account Set	USA	Accounts payab	le, Other		On Ho	d		
Rate Type	SP							
Bank Code	SEATAC	Seattle Tacoma	Bank					
Payment Code	CHECKUSD	USD check Sea	attle Tacoma Bank					
Check Language								
Delivery Method	Mail]						
Tems	DUETBL	Due by Invoice	Date					
Retainage Terms								
Retainage %	0.00000]						
Retention Period	0]						
Tax Group	CALIF	California State	Tax Group					
Tax Authority	Authority Descri	Tax Class	Class Description	Registration Number	Tax Included			
STATE COUNTY	State Tax County Tax		Taxable item Taxable merchandise		No No			
Vendor Account St	tatus			· · · · · · · · · · · · · · · · · · ·				
Outstanding Balan	ice	1,123,641.5		nvoices	6			
Prepayment Amount		0.0		ments	0			
Outstanding Retain	nage	0.0						
Credit Limit		1,000.0						
Refresh							Close	
							2.000	

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 Receipt Entry screen.

SAMLTD - Extended PO Receipt Entry <u>Elle Help</u> P/O Receipt Entry		- 🗆 X
Receipt Number I ADMIN Vendor Number 4540 + Econ Industries		
Receipt Taxes Additional Costs Optional Relds Rates Totals		
PO Number P000000007 Q From Multiple POs 5 Job Related Retainage No. of Receipts 1	Optional Field	Value
Receipt Date 2019-01-09 Posting Date 2019-01 Last Receipt No. RCP00000001	Require PO Number on Receipts Note	Note that vendor bills thro
Template Bill-To Location 1 Image: Ship-To Location 1 1 1 <td>Vendor's Purchasing Represen Vendor Class</td> <td>Veena Strong Service Provider</td>	Vendor's Purchasing Represen Vendor Class	Veena Strong Service Provider

This feature lets you view notes concerning the account during data entry, and also view receipt requirements – in this example, one of the fields is "Require PO Number on Receipts."

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

Require Purchase Order Number on Receipts

Extended PO Receipt Entry includes an option to require users to include purchase order numbers on receipts for all or for selected vendors. You select this option in the Productivity Tools Options program.

	Extended PO Receipt Entry /O Receipt Entry		- 🗆 X
Receipt Num			
Vendor Numb Rec <u>e</u> ipt Ta <u>x</u> es			
PO Number	C From Multiple POs D Job Related Retainage No. of Receipts	Optional Field	Value
Receipt Date	2021-04-19 🛗 Posting Date 2021-04-19 🛗 2021 - 04 Last Receipt No.	Require PO Number on Receipts Note	Yes Note that vendor bills thro
Template	Q Bill-To Location Q Ship-To Location Q P	Vendor's Purchasing Represen	Veena Strong Service Provider
FOB Point	Ship-Via 🔍		

If you use the option to force PO numbers on receipts, but try to post a receipt that's missing the PO number, the following message appears.

S Error	×
Error Description: Purchase Order Number cannot be blank. Source: 10:18:08 -	~
	~
Print	<u>C</u> lose

Notes:

The program lets you require PO numbers for all vendor receipts, or only for vendors with a "Yes" value for a specific optional field. For example, the Extended PO Receipt Entry screen pictured above shows an optional field called "Requires PO Number on Receipts" – where the value "Yes" for the field determines that a PO number is required.

• If a vendor record does not include a value for the Yes/No optional field, the program will **not** require a purchase order number when you create a receipt.

Setting Up the Option to Require PO Numbers on Receipts

In the following example, the program uses the Yes/No value in Optional Field "REQPO" (with a description "Requires PO Number on Receipts") to determine whether vendors require a PO number.

• You choose the option and the optional field using the Productivity Tools Options program on the Sage 300 Desktop:

S Sage 300 - Sample Company Limi	ted	Administrator	– 🗆 🗙
Home			
TaiRox Productivity Tools Accounts Payable Tools	TaiRox Productivity Tools (General Le	edger Tools	:)
Accounts Receivable Tools General Ledger Tools Inventory Control Tools Multi-Company Tools Order Entry Tools	Licensed to: Don Thomson, TAIROX SOFTWARE INC Dealer: CC:	2	_
Purchase Order Tools ✓ Visual Process Flows A/P Transactions	General Ledger Tools Order Entry Tools Purchase Order Tools	Inventory Control Tools	Accounts Receivable Tools
A/R Transactions B/K Reconciliation C/P Transactions	Accounts Payable Multi-Company Tools License Information Tools	Options	Convert Contacts
G/L Transactions V SAGE For Help, press F1		E Session	Date: 2021-04-12
SAMLTD - Options <u>Fi</u> le <u>H</u> elp		-	- - ×
Menu Item Quantities Order Entr	y Purchase Orders		
Receipt Must Have a Purchase	Order Number Vendor Optional Field	REQPO	Q
Optional Field name to control this o		ceipts. Select a `	Yes/No Vendor
Purchase Order/Receipt Vendor (AC# Accounts Payable Contact Type Disc Level Discount Grace Period	Include -> Include -> Include -> Include -> Vendor's Purchasing Reprevent of Class		<u>U</u> p <u>D</u> own
Due Date Grace Period Temporary Vendor UPS Zone	<u>A</u> II ->		

 If you use the option to force PO numbers on receipts – and the vendor record includes the control field with a "Yes" value – the following message appears when you try to post a receipt that's missing the PO number.

	ended PO Receipt Entry Receipt Entry		- 🗆 X
Receipt Number Vendor Number Rec <u>ei</u> pt Taxes A	I ← ← TNEW *** → → → ↓ ♀ + 4540 ♀ + ₽ ♀ Leon Industries ddtjonal Costs Optional Fields Rates Tgtals	Entered By Required	
PO Number	From Multiple POs 5	Job Related Retainage No. of Receipts 0	Optional Field Value
Receipt Date	S Error	Last Receipt No.	Require PO Number on Receipts Yes Note Note that vendor bills th
Template FOB Point Terms Code *	Error Description: Purchase Order Number cannot be blank. Source: 10:27:51 -	Ship-To Location Q	Vendor's Purchasing Represen Veena Strong Vendor's Purchasing Represen Veena Strong Vendor Class Service Provider

• In this example, the "Requires PO Number . . ." field also appears at the top of the Optional Field list on the Extended PO Receipt Entry screen.

Note that the field appears on the Extended PO Receipt Entry screen if:

- It has been added to the Vendor record in A/P.
- It was added to the set of optional fields that are displayed in Extended PO Receipt Entry (using the Productivity Tools Options program).

Quantities Displayed on the PO Receipt Entry screen

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

🗾 PTDEMO - Exte	ended PO Receipt Entry	- 🗆 ×
<u>F</u> ile <u>H</u> elp P/O R	Receipt Entry	
Receipt Number	I I I I I I I I I I I I I I I I I I I	* Required
Vendor Number	1580 Q + 6 @ Grant Office Supplies	
Rec <u>e</u> ipt Ta <u>x</u> es Ado	ditional Costs Optional Fields <u>R</u> ates Totals	
PO Number	G From Multiple POs 🔂 Job Related Retainage No. of Rec	ceipts 0
Receipt Date	01/10/2020 B Posting Date 01/10/2020 01/2000	
Template	C Bill-To Location C 5 Ship-To Location C 5	
FOB Point	Ship-Via	
Terms Code *	DUETBL Q Due by Invoice Date	
Vendor Acct. Set *	USA Q Accounts payable, Other	
Description	Reference	
Lin Completes .		sure Q ^
1 No	A1-105/0 13W Mini Fluorescent Bulb 1 No 0 Ea.	
Item/Tax	Calc. Taxes Receive All Item Finder Drop Ship Receive Receipt Subtotal	0.00 USD
Po <u>s</u> t Inv	voice History	Close
Location 1 (Ea.)	Qty. On Hand Qty. On Sales Order Qty. On Purchase Order Qty. Committed Qty. Available 70 15 12 80 12 70	
All Locations (Ea.)	378 23 480 2 0 378	

Displaying Quantities for multiple locations and companies

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

To display quantities for multiple locations and companies:

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

Extended PO Receipt Entry Displaying Quantities for multiple locations and companies

September 2015 PTDEMO - Extended PO Entry	y Settings	×
Displav Item Quantites	Display on Separate Screen	•
Save	Do Not Display Display on Entry Screen Display on Separate Screen	

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

Pogt Invoice History						Glose
		On Sales Order Qty. On Pu		Qty. Committed	Qty. Available	
Location 1 (Ea.)	70	15 🔛	80 🕒	0 🦰	70	
All Locations (Ea.)	378	23 🕒	480 💾	0 🞴	378	

• **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.

Location (Ea.)		0	0 🔛	0 🕒	0 🗳)	
All Locations (Ea.)		657	23 🛄	276 🔛	0 🕒	65	7	
Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Hand	Qty. On Purc
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	
				1				

 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.)

🛃 PTDEMO -	Item Quantities															- 0	×
_Ele Help																	
Database ID	Name	Location	Description	Item Number	Description	Stocking Unit	Qty. On Ha	Qty. On Purc	Qty. On Sales O	Qty. Available	Qty. Committed	Oty. Available fo	Qty. On Hand (All)	Qty. On Purcha	Qty. On Sales O	Qty. Available (/	(Al)
SAMLTD	Sample Company Limited	1	Central warehou	A1-103/0	Ruorescent Des	Ea.	137	250	15	137		122	657	426	34	6	657
SAMINC	Sample Company Inc.	1	Central warehou	A1-103/0	Ruorescent Des	Ea.	137	310	1	137	0	136	657	486	32	e	657
SAMINC	Sample Company Inc.	2	Potland Office	A1-103/0	Ruprescent Des	Ea.	262	50	21	262	0	241	657	486	32	F	657
SAMLTD	Sample Company Limited	2	Potland Office	A1-103/0	Ruorescent Des	Ea.	262	50	9	262	0	253	657	426	34	6	657
e l																	
Befresh																Close	

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 Receipt Entry screen if you choose to dsplay 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.

PTDEMO	- Options				- 🗆 ×
<u>F</u> ile <u>H</u> elp					
Menu Item Qu	antities				
Database ID	Description	User ID	Password	Location	Test Connection
SAMLTD	Sample Company Limited	sa	pass1234	1	Move Up
SAMINC	Sample Company Inc.	sa	pass1234	1	Move op
SAMINC	Sample Company Inc.	sa	pass1234	2	Move Down
SAMLTD	Sample Company Limited	sa	pass1234	2	
PTDEMO 🖵	Productivity Tools Demo	sa			
CHKVAN					
CPYINC					
CPYLTD					
PTCOPY					
PTDEMO					

• 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.

Z PTDEMO - Item Quantities − − × E ^{lle} Help											
Location	Description	Item Number	Qty. On Hand	Qty. On Hand (All)	Qty. On Purchase Order	Qty. On Sales Order	Qty. Available	Qty. Committed	Qty. Available for Sale		
	Central warehou	A1-105/0	70	378	80	15	70	0	55	Ε	
2	Portland Office	A1-105/0	143	378	0	8	143	0	135	1	
3	Newark, New Je	A1-105/0	75	378	150	0	75	0	75		
4	Port of Vancouver	A1-105/0	90	378	250	0	90	0	90	-	
٠			III						÷.		
Ref	fresh								Close		

Using the Extended Drop Ship window

The Extended Receipt Entry Drop Ship window lets you set the drop-ship column for multiple receipt 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 functionality is used more in Extended PO Entry when creating purchase orders.)

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

- 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.

PTDEMO - Dr <u>File H</u> elp	op Ship							- • ×	
Set Drop Shipme		Customer Ship-To	Address			•			
Ship-To Location	n	WAREHS	Q						
Description	Warehouse								
Address	Receiving [Jock 17							
	Wabash Inc	Jstrial Park							
	Wabash								
City				State					
Zip/Postal Code	V3W2H2			Country		USA			
Phone Number	() -			Fax Numb	er	() -			
Location E-mail									
Contact									
Contact Phone	() -								
Contact Fax	() -								
Contact E-mail									
Include	Line	Item Number	Item Description		Locatio	n Drop-Sh	ip 🛛	Quantity Ordered	
No		D1-608/B	Double Pedestal		1	Yes		1	
No		C1-250/R C2-230/G	Krugg 250 Am Ti		1	Yes Yes		1	
No No	-	C2-230/G D2-613/B	2300 Series Post Single Pedestal 6		1 1	Yes		1	
No		F1-265/B	Filing Cabinet - 2		1	Yes		2	
•	m							F	
Select All	S	elect None	Drop Ship					Cancel	

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 items in the PO Receipt Entry window grid as drop-shipped items with the selected address.

Choose the second drop ship address and items

- Select another shipment address to drop ship other items on the receipt 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 Receipt Entry grid with the selected address.
- Press Cancel when done to return to the main PO Receipt Entry window.

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Receive in Sorted Order

Receive in Sorted Order functionality is most useful when a large PO is being received and the packing slip is not sorted by PO line number.

- Press the Receive button to pop up a window to display items sorted in a different order.
- You can specify three levels of sort order. Sort order choices are by Line Number, Item Number, Vendor Item Number, Item Description, Quantity Received, Received to Date, and Quantity Outstanding.
- Received items can be entered on this form using a time-saving "enter-tab-enter-tab-..." sequence.

💌 Р	TDEMO - Recei	ve							×
	<u>H</u> elp								
	ler By								
	lect Order By								
	m Number								
(No Line	ne) e		1						
Iten	n Number							Load	
	ndor Item Number n Description								
Qua	antity Received			Locati	Quantity Receiv	Unit of Meas	Received to Date	Quantity Outstandi	Vend
	ceived to Date antity Outstanding			3	-	Ea.	0	0	
	5 F1-265/T	Filing Cabinet - 2 Drawers	1	3		Ea.	0	0	
4	4 F1-270/T	Filing Cabinet - 2 Drawers		3	15	Ea.	0	10	
1	3 F1-465/B	Filing Cabinet - 4 Drawers		3	25	Ea.	0	0	
	2 F1-465/T	Filing Cabinet - 4 Drawers		3		Ea.	0	0	
	1 F1-470/T	Filing Cabinet - 4 Drawers	- Hunts-2500	3	6	Ea.	0	19	
•				111					*
		Qty.	On Hand Qty. On	Sales Order	Qty. On Purchase	Order Q	ty. Committed	Qty. Available	
Loc	ation 3 (Ea.)		0		E	75 🔛	0 🕒	0	
ALL	Locations (Ea.)		0	4		75 🕒	0 🕒	0	
								Close	

Quick PJC Entry

To speed up data entry, Extended PO Receipt 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):

🛃 PTDEMO - Ex	tended PO Recei	pt Entry				-	□ ×
<u>F</u> ile <u>H</u> elp P/C) Receipt Entry						
Receipt Number] • • • NEW ••	•	▶) I	Entered By			* Required
Vendor Number	2800	् + 🗗 ।	Modem Design Ltd.				
Rec <u>ei</u> pt Ta <u>x</u> es /	Additional Costs Optio	nal Fields Totals					
PO Number		Q	From Multiple POs	🚽 Job F	Related 📃 Retaina	age No. of Receipts	0
Receipt Date	01/10/2020	Posting Date	01/10/2020	2020 - 01 La	st Receipt No.		
Template	Q	Bill-To Location	Q 0	Sh	ip-To Location	୍ 🥫	
FOB Point			Ship-Via		Q		
Terms Code *	DUETBL	Due by Invoice Date)				
Vendor Acct. Set *	OTHER Q	Accounts Payable, C	Other				
Description			Referen	ce			
Completes	Q. Contract	Q Project	Q, Category	Cost Class	Q Item Number	Item Description	Q ^
	120-1200-10	1003	MGTLABOR	Labor	100060	Frye, Donald William	
No	120-1200-10	1003	MGTLABOR	Labor			
•							
Item/Tax		ceive All Item Finder.	Drop Ship	Receive R	eceipt Subtotal	0.0	00 CAD
Po <u>s</u> t I	nvoice Histor	¥					Close
	Qty. On Hand		Qty. On Purchase Order			y. Available	
Location	0				0 🧧	0	
All Locations	0	0	• 0		0 🔚	0	