Extended Ship-To Location

Extended Ship-To Location is an enhanced replacement for the Sage A/R Ship-To Locations form. It provides you with more features while adding or editing a ship-to location and fast access to customer information.

The Extended Ship-To Location window lets you:

- Use a "SmartFinder" to look up customers and existing ship-to addresses.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes. This option also provides Finders for looking up country, state and province codes.
- Display customer addresses in Google maps.
- Create new emails for the Customer and Contact email addresses.
- Maintain ship-to locations for customers across multiple Sage 300 companies using the Copy Ship-To Locations functionality.

The following pictures show the extra buttons on the Extended Ship-To Location screen:

Sage A/R Ship-To Locations screen

😰 PTDEMO - A	VR Ship-To Locations			×
<u>F</u> ile <u>H</u> elp				
Customer No. [Ship-To Location	Q			
Address Contact	Ingoicing Optional Relds			
Last Maintained	Primary Ship-To			
Address			_	
		_		-
City	Country			5
State/Prov.	Telephone () ·	_	_	
Zip/Postal Code	Fax () -			
Email		_		
Territory				
Add	Delete		Qlos	

hip-To Location		▶ ▶I Q +				
Addgess Contac	t In <u>v</u> oicing O	ptional Fields				
Last Maintained	//	Inactive		Primary Ship-	То	
Address						
City			Countr	(
State/Prov.			Q Teleph	one () ·		
Zip/Postal Code			Fax	() -		
E-mail						
Tentory						

Using Extended Ship-To Location

You get to the Extended Ship-To Location window by first opening Extended Ship-To Locations under **TaiRox Productivity Tools > Accounts Receivable Tools** on the Sage 300 desktop.

S Sag	e 300 - Sample Company	Limit	ed .						Administrator	-		×
Home												
> Ta	iRox CRM and Collections	^			1 (5) 1							
∨ Ta	iRox Productivity Tools		Accounts R	eceivable lo	ols (Extende	ed Ship-To Lo	ocations)					
	Accounts Payable Tools		Licensed to: E	on Thomson, TAIROX S	OFTWARE INC							
	Accounts Receivable Tools		Dealer: T	AIROX SOFTWARE INC								
	General Ledger Tools		CC: T	AIROX SOFTWARE INC								
	Inventory Control Tools											
	Multi-Company Tools										[==]	
	Order Entry Tools											
	Payroll Tools		Extended Customers	Extended Customer Inquiry	Extended Ship- Io Locations	Extended AK Receipt Entry	Apply Documents	Mass Billing	Notes	Ma	ail Mergi	e
	Purchase Order Tools	~			L							
sage	For Help, press F1								Session Dat	e: 2022-0	04-05	à /

TaiRox Extended Ship-To Location screen

• The Extended Ship-To Locations window appears as follows:



- Click the New button to add a new ship-to location.
- Click the Customer No. button to select a customer using the SmartFinder and display existing ship-to locations.
 - Double-click a ship-to location to edit the existing information, or click New to a add a new location.

Look up customers and ship-to addresses using the Customer Number SmartFinder

• Click the Customer No. button at the top of the Extended Ship-To Locations form.

<mark></mark>	tended Ship-To Ship-To Locations) Locations		-	. 🗆	×
Customer No.	•					
Ship-To Location	Description	Primary Ship-To	Address	City	State/	Pro 🔦

Or

- Click the New button on the Extended Ship-To Locations form.
- Then click the Customer No. button at the top of the Extended Ship-To Location form.

PTDEMO - Extended Ship-To Location	_	×
<u>F</u> ile Settings <u>H</u> elp A/R Ship-To Locations		
Customer No.		
Ship-To Location		

The SmartFinder search form will appear for customers and ship-to locations.

How to use Search:

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

DTDEMO	- Extended Ship-To Location	
<u>F</u> ile <u>H</u> elp		
Search	way	Find
Active Cus	omers Only	

- You can also filter for Active customers.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields for example, one record may have "way" in the name, where another may have it in the address field. Both records will be displayed.

- **Using multiple words in the search?** Enter "300 Main" and the search will find entries "300 Main Street" as well as "123 Main Street, Suite 300".
- **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(451) 555-8991" as well as "(408) 451-8991".

Note:

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

What's displayed in the Search form:

- The top grid displays the customers matching the search criteria.
- The bottom grid displays the ship-to locations that match the search criteria. You can also filter by Active Ship-To Locations.

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

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

💌 PTDEMO -	PTDEMO - Extended Ship-To Location							
<u>F</u> ile <u>H</u> elp								
Search	way						Find	
Active Cust	omers Only				_			
Customer Nur	nber Status	Customer Name	Short Name	Address Lin	Address Line 2	Address Line 3	Address Line 4	
1210	Active	ACME Plumbing	ACME	927 Warehouse				
1580	Active	Break-Away Des	BREAK	743 Wark Street				
1890	Active	J & Y Builders Ltd.	J&Y	333 Ralston Way				
	T.I						·	
Active Ship	To Locations Only		_		1			
Customer Nur	nber Ship-To Location	Status	Description	Address Lin	Address Line 2	Address Line 3	Address Line 4	
1500	MID	Active	Mid-way wareho	#2211 Mid-way	150 Tasmanian			
1550	BOOK	Active	Chapter One Bo	3383 Broadway				
1580	WEST	Active	Break Away - Ea	9754 Nicel Pead				
1300	WEST	Active	break Away - w	5754 Niger Noau				
•								
Select							Cancel	

• Double-click email addresses (such as the Contact E-mail) to create new emails.

How to select:

- Double-click a customer in the top grid to select and enter the customer on the Extended Ship-To Location form.
- Double-click a ship-to location in the bottom grid to enter the customer (and ship-to address if looking up the location on the Extended Ship-To Location form).

Look up addresses in Google Maps

• Click the Address button on the Extended Ship-To Location screen to confirm the address.

Ship-To Location	East Oakland Warehouse
Address Contact Invoicing Optional Fields	
Last Maintained 08/18/2010 Inactive	G https://www.google A C Search
Address 4075 Broadway	I G M. G 2 G M. G 2 G 4 G × ▶
	▶ Sign in
	4075 Broadway
City Uakland	47550
State/Prov. CA	ve And Hoof

Launch emails for customers and customer contact email addresses

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

	Address	4075 Broadway	🝙 🖬	5	(° 4 4	↓ Untit	led - Messag	e (HTML)	_ 0	23
			File		Message	Insert	Options	Format Text	Review	⊘ ?
			То		freidag@barg	ainmart.com	1			
Cit	у	Oakland	Subject		Please confir	m warehou	se address			
Sta	ate/Prov.	CA								23
Zip	o/Postal Code	97854								
	E-mail	freidag@bargainmart.com								
Te	mitory									_

Enforce ISO 3166 country codes

Use this option to force country, state and province codes to match ISO 3166 codes, and to use Finders to select country, state, and province codes. (Useful if your Sage 300 addresses are feeding into shipping software.)

- This setting can only be changed by the Sage 300 ADMIN.
- Choose Settings from the Extended Ship-To Location menu.

🗾 P	TDEMO -	Extende	ed Ship-To Location	-		×
File	Settings	Help	A/R Ship-To Locations			
Cu	🗸 Use IS	O 3166 C	ountry, State, and Province Codes			

- o If you want to use this option, make sure it displays the checkmark.
- The program will also display new Finder buttons to let you select ISO country, state, and province codes from Finder lists.

City	Seattle	Country	US C	2
State/Prov.	WA 🔍	Telephone	(207) 334-9991	Ī

• An error message will appear when you click Save if the codes are not valid. You must fix them before you can save the ship-to location record.

Copy Ship-To Locations to other Sage 300 companies

IMPORTANT:

You must enter a User ID and Password to copy ship-to locations. Make sure the User ID has sufficient rights to complete the operation in the <u>target</u> companies.

If you are inserting new ship-to locations in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the ship-to locations that you want to copy.
 - Copy Ship-To Locations operates from within an existing "source" company, and lets you copy ship-to information to other Sage 300 company databases.
- Open the Extended Ship-To Location form, and click the Copy Ship-To Locations button at the bottom of the screen.

Save Delete	Copy Ship-To Locations	Close

When you click the Copy Ship-To Locations button, a window will pop up for selecting the ship-to locations in the source company.



Note: By default, the grid at the bottom of the form will display any new ship-to locations that were added in this session. This allows you to bypass the selection process and copy these new ship-to locations directly to other Sage company databases.

Specify a range of ship-to locations for copying:

You can specify ranges for up to seven ship-to location fields to use for location selection – including the customer number, ship-to location code, primary ship-to indicator, territory code, tax group, customer price list, ship via code, inventory location, salesperson, or any of the optional fields that you use for ship-to locations.

SAMLTD - Extended Ship-To Location				
<u>F</u> ile <u>H</u> elp				
Ship-To Location Range				
Select Ship-To Locations By	From	То		
Ship-To Location		ZZZZZZ		
(None) Customer Number Ship-To Location Primary Ship-To Indicator Status Terntory Code Inactive Date Tax Group Customer Price List Ship Via Code Invertory Location				

Choose additional criteria:

(None) Addi	tional Criteria	-		Load
Include	Customer Nun	n Ship-To Location	Description	Primary Ship-To Status
	Column	ria - Ship-To Locations Date Last Maintained	✓ Add Delete	
	Field Criteria	Date Last Maintained >= 01012021		
	Or			

• Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting locations that were last maintained after Jan 1, 2021. Click OK to save.

Load the list of locations and choose which ones to copy:

(None)		•			
Additional Criteria				Load	
Include	Customer Num	Ship-To Location	Description	Primary Ship-To	Statu 🔦
No	1105	EAST	East Oakland Warehouse	No	Activ
No	1105	WEST	West Oakland Warehouse	No	Activ
No	1200	HOME	Home office	No	Activ
No	1200	WAREHS	Warehouse	No	Activ
No	1210	A	Receiving Dock A	No	Activ
No	1210	В	Receiving Dock B	No	Activ
No	1210	С	Receiving Dock C	No	Activ
No	1240	POSTAL	Postal Outlet	No	Activ
No	1400	ALHAMB	Alhambra Business Complex Cons	No	Activ
No	1400	AVONIE	Avenies Mall Construction Site	No	Active

• Click the Load button to display the list of ship-to locations.

When the Load button is pressed, the program will display the ship-to locations in the range and with the additional criteria you specified.

- You can adjust the ship-to location range or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the ship-to locations loaded in the grid.



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

Include	Customer Num	Ship-To Location	Description	Primary Ship-To	Statu 🔺
No	1105	EAST	East Oakland Warehouse	No	Activ
Yes	1105	WEST	West Oakland Warehouse	No	Activ
No V3	1200	HOME	Home office	No	Activ
No	1200	WAREHS	Warehouse	No	Activ

Click the Copy button to display the "To Companies" screen:



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

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

For example, choose Update Only to update information for all existing ship-to locations in the target companies – but add no new codes.



- Choose whether to insert, insert and update, or just update ship-to locations.
 - o Insert Only will only add codes if the code does not already exist.
 - o Update Only will only update codes that already exist.
 - o Insert and Update will perform both of these operations.

Select target Sage 300 companies:



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

Select All	Select None
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Click the checkboxes to complete your company selections.

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

SAMLTD - Copy A/R Ship-To Locations to Companies				
<u>File</u> <u>H</u> elp				
Update Only				
Select Companies to Copy A/R Ship-To Locations To				
SAMLTD - Sage 300 Sign-on				
Veer ID ADMIN Password				
Select All Select None Progress				
Copy Log	Close			

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

Note: You MUST have sufficient permissions to update ship-to locations in the target companies for copying to proceed.

- The program will copy the ship-to locations to the target companies.
- If no changes are required for a selected location, the record will not be updated so the audit stamp will be preserved.

Click the Log button to confirm which ship-to locations were processed:

4/14/2021 4/14/2021	3:06:21 3:06:21	PM PM	Copy A/R Ship-To Locations to Companies	started.
4/14/2021	3:06:21	PM	Performed by user: ADMIN	
4/14/2021	3:06:21	ΡM		
4/14/2021	3:06:21	ΡM	Update Only	
4/14/2021	3:06:21	ΡM	Copy A/R Ship-To Locations to Companies:	Productivity Tools Demo - copy
4/14/2021	3:06:21	ΡM		Sample Company Inc
4/14/2021	3:06:21	ΡM		TaiRox Productivity Tools
4/14/2021	3:06:21	ΡM		
4/14/2021	3:06:21	ΡM	Copying ship-to locations from Sample Co	mpany Limited to Productivity
Tools Dem	о – сору	sta	arted.	
4/14/2021	3:06:21	ΡM	Logging in to Productivity Tools Dem	o - copy
4/14/2021	3:06:22	ΡM	Updating ship-to location 1105-WEST.	
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1200-HOME.	
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1200-WAREH	S
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1210-B	
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1210-C	
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1400-ALHAM	B
4/14/2021	3:06:22	ΡM	Ship-To location updated.	
4/14/2021	3:06:22	ΡM	Updating ship-to location 1400-AVONL	Ε
4/14/2021	3:06:22	ΡM	Ship-To location updated.	

The Log lists:

- The user and the type of operation performed.
- Each ship-to location that was processed and whether the records were updated.