Extended Vendors

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

Extended Vendors lets you:

- Maintain vendors across multiple Sage 300 companies using the Copy Vendors functionality.
 - Specify a range of vendors from the current company, filter them by additional criteria, cherrypick vendors from the results, and then copy the final set to other associated Sage 300 companies.
 - \circ $\;$ Select or de-select companies to copy to on an individual basis.
 - Display a full log of copied vendors.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes.
- Add an unlimited number of contacts per vendor if you use older versions of Sage 300. If you use Sage 300 2020.1 or higher and activate the Sage M/T Contacts module, Accounts Payable uses Sage 300's Multiple Contacts features.
- Display Vendor addresses in Google maps.
- Create new emails for the Vendor and Contact email addresses.
- Display Vendor web sites in a browser.

Sage A/P Vendors screen

The following pictures show the extra buttons on the Extended Vendors screen:

PTDEMO - A/P Vendors	×
Ele Settings Help	
Vendor Number* I 4 4 🕨 🕨 🕨 🔍 🕂	
Vendor Name *	
	* Required
Address Cogtact Processing Ingoicing Optional Fields Statistics Activity Comments	
Group Code *	
Business Reg. No.	
On Hold Last Maintained / / Inactive	
Short Name Start Date 08/07/2018 🛗	
Legal Name	
Address	
City Country	
State/Prov. Telephone () ·	
Zo/Postal Code Fax () -	
Emai	
Web Ste	
Add Delete	Qiose

TaiRox Extended Vendors screen

PTDEMO - Extended Vendors Ele Settings Help A/P Vendors		×
Vendor Number		_
Vendor Name *	* Require	4
Address Contract Processing Ingoicing Optional Fields Statistics Activity Comments	riegarei	<u> </u>
Group Code *		
Business Reg. No.		
On Hold Last Maintained / / Inactive		
Short Name Start Date 08/07/2018		
Legal Name		
Address		
Oty Country		
State/Prov. Telephone () ·		
Zp/Postal Code Fax () ·		
E-mail Web Ste		-
Web Ste		1
Add Delete Copy Vendors	Qose	

Click the following links for details on each Extended Vendors feature:

<u>SmartFinder – Vendors</u> Find a vendor quickly from a name, description, phone number or address.

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

Address Lookup Display address location in Google Maps.

E-mail Creation Launch your email client to create an email for this vendor.

Web Site Lookup Launch your browser with the vendor's website URL.

<u>Enforce ISO 3166 Country Codes</u> Turn on this option to force country, state and province fields to match ISO 3166 codes.

Multiple Contacts Store an unlimited number of contacts per vendor.

If you use an older version of Sage 300 – prior to Sage 300 2020.1 – you can add multiple contacts per vendor using Extended Vendors. If you have installed Sage 300 2020.1 and have activated Sage Multiple Contacts module, Accounts Payable uses Sage 300's Multiple Contacts features.

See <u>Convert TPT Contacts to Sage 300 Multiple Contacts</u> for instructions on converting TaiRox contacts to Sage 300 Multiple Contacts.

<u>Copy Vendors</u> Copy vendors to multiple Sage 300 databases in a single operation. Insert-Only, Update-Only, and Insert-and-Update operations are provided.

Using Extended Vendors

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

Sage 300 - Productivity Tools	Demo			Administrator			×
Home							
TaiRox Productivity Tools							
Accounts Payable Tools	Accounts I	ayable lool	s (Extended V	endors)			
Accounts Receivable Tools	Licensed to:	TAIPOX SOFTWARE IN	C. TAIROX SOFTWARE INC				
General Ledger Tools		TAIROX SOFTWARE IN					
Inventory Control Tools	CC:	TAIROX SOFTWARE IN	с				
Multi-Company Tools							
Order Entry Tools				i			
Payroll Tools							
Purchase Order Tools +	Extended Vendors	Vendor Inquiry	Extended Remit-To Locations	Mail Merge		A/P Cre nent Ba	
•			Locations				
Sage For Help, press F1				Session Da	ate: 1/10/2	2020	\sim

SmartFinder – Vendors

Click the Vendor Number button at the top of the form to open the SmartFinder for searching vendors.

PTDEMO - Extended Vendors <u>F</u> ile Settings <u>H</u> elp A/P Vendors	-	×
Vendor Number		
Vendor Name *		

Search:

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

👳 PTDEMO	- Extended Vendors	_ 0 🔀
<u>F</u> ile <u>H</u> elp		
Search	seattle	Find
Active Ven	dors Only	

- 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.

PTDEMO	PTDEMO - Extended Vendors									
Eile Help										
Search	seattle						Find			
Active Ver										
Vendor Num			Short Name		Address Line 2	Address Line 3				
6010	iber Status Active	Vendor Name J. D. Gamer Ent	Short Name J. D. Gam	Address Lin	Address Line 2	Address Line 3	Address Line 4			
6010	Active	J. D. Gamer Ent	J. D. Gam	6609 Commercia						
٠							4			
	mit-To Locations Only				-		Þ			
	mit-To Locations Only	Status	Description	🖪 Address Lin	Address Line 2	Address Line 3	Address Line 4			
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Active Rer Vendor Num	mit-To Locations Only aber Remit-To Locati					Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Cartive Ren Vendor Num 1200	nit-To Locations Only iber Remit-To Locati SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				
Active Rer Vendor Num 1200 6010	mi-To Locations Only ber Remi-To Locatio SENTAC SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3	Address Line 4			
Cartive Ren Vendor Num 1200	nt-To Locations Only ber Pent-To Locatio SEATAC SEATAC	Active	Seattle Tacoma	PO Box 13233	Tacoma Bay	Address Line 3				

Selection:

- Double-click a vendor in the top grid to select and enter the vendor on the Extended Vendors form.
- Double-click a remit-to location in the bottom grid to enter the vendor.

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.

Vend	lor Number	I I	350		2 + 🖸		
Vendor	Name *	Excide Ind	ustrial Batteries		-		
PTDEMO - V Eile Settings	Vendor Inquiry Help 1350	► ► Q 🖪	Excide Industrial Batteries			- X	
Pending Requir	sitions POs POR	eceipts PO Invoi	ces PO Returns PO CR/I	DR Purchases Aging	Items		
			Recur. Payables Activity				
Short Name	EXIDE				Start Date	01/01/2009	
Legal Name					Last Maint	ained 08/18/2010	
Group Code	INV	Inventory Purcha	ises		Active	11	
Account Set	USA	Accounts payabl	e, Other		On Hol	d	
Rate Type	SP						
Bank Code	SEATAC	Seattle Tacoma	Bank				
Payment Code	CHECKUSD	USD check Sea	ttle Tacoma Bank				
Check Language							
Delivery Method	Mail						
Terms	P90	90 day Multiple F	ayments				
Retainage Terms							
Retainage %	0.00000						
Retention Period	0						
Tax Group	USDTAX	US Sales Tax - F	Purchase				
Tax Authority	Authority Descri	Tax Class	Class Description	Registration Number	Tax Included		
STATE	State Tax		Taxable item		No		
COUNTY	County Tax	1	Taxable merchandise		No		
-Vendor Account St Outstanding Balan		30,964.79	No. of Open In	voices	5		
Prepayment Amour		0.00			5		
Outstanding Retain		0.00		L	_		
Credit Limit		2,000.00					
Refresh						Close	

Look up addresses in Google maps

• Click the Address button on the Extended Vendors screen to confirm locations.

Vendor Name *	Excide Industrial Batteries		G 486 Central St - Google Maps ×	iearch
Address Contract Group Code * Business Reg. No	NV Q Inventory Purchase			THANKS YES
Con Hold Short Name	Last Maintained 08/18/2010 EXIDE Start Date 01/01/	2009	,	Sign in
Legal Name Address	486 Central Street	_	Contanda Terminals	486 Central Stre
		_	E Arenue R Gammon Gear	Central St
Chy	Houston	Countr	0	E Avenu
Sate/Prov.	TX	Teleph	Tool Doctor Hartman Park	
Zp/Postal Code	67182 exide/Rbox exidebatteries.com	Fax	0531130000001	+
E-mail Web Site	www.exidebatteries.com	_	on Stelle Houston, TX 77012, USA 29.722568, -95.259842	🛛 🖓 🖡
			Map data 02018 Google Canada Terms Send feedback	100 m

Launch emails for vendors and vendor contact email addresses

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

Address	486 Central Street	🛐 📕 🤊 👩 🐟 🗇 🔫 Please confirm your address - M. 👝 🗉
		File Message Insert Options Format Text Review A
City	Houston	Paste J Ecst J E
City		Clipboard 😨 Zoom
State/Prov.	TX	
Zip/Postal Code	67182	To exide @pop.exidebatteries.com
E-mail	exide@pop.exidebatteries.com 💋	Subject: Please confirm your address
Web Site	www.exidebatteries.com	
		exide@pop.exidebatteries.com
Save	Delete	Copy remotes

Look up Web sites in your browser

• Click the Web Site button on the Extended Vendors screen to confirm Web site URLs.

PTDEMO - E: File Settings	xtended Vendors Help A/P Vendors		–
Vendor Numb	er 4 7400 > > (2 + 🖸	
Vendor Name *	Koyo Precision Bearings		
			* Required
Address Contact	Processing Ingoicing Optional Fields Statistic	s Activity	
Group Code *	INV Q Inventory Purchases	1	(←)(←) (€ https://portal.koyob ≜ ¢) Search
Business Reg. No.	-		Home X
🖾 On Hold	Last Maintained 08/18/2010		
Short Name	KOYO Start Date 11/08/	2008 🖮	UTERTFORMAL
Legal Name			Koyo TOYODA Portal Home Login Register Forgot My
Address	25-12 looonmatsu		
	Suginomiku		Welcome to the JTEKT Portal Homepage
			Sign up as a supplier, change your Register as a user to view you
			company's information, access forms and view procedures.
	Tokyo		
City	lokyo	Country	
State/Prov.		Telephor	Contact Us View our facility locations and View our facility locations and
Zip/Postal Code	03-25119821	Fax	contact information. company's information, access forms and view procedures.
E-mail	sales@koyobearings.com		
Web Ste	www.koyobearings.com		
			This website applies to JTEKT North Americ Koyo Bearings USA LLC, and JTEKT Automotive
			Click here to learn more,
			PORTAL HOME Site Policy Contact Us Copyrit
			>
Save	Delete		Copy Vendors Qose

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.

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

🛃 PTDEMO - Extended Vendors		-	×
<u>F</u> ile Settings <u>H</u> elp A/P Vendors			
Use ISO 3166 Country, State, and Province Codes	Q + Q		

- 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	Vancouver		Country	CA	Q
State/Prov.	BC	Q	Telephone	(604) 976-2819	

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

Maintain an unlimited number of contacts per vendor

Extended Vendors lets you store an unlimited number of contacts per vendor. If you use Sage 300 2020.1 or higher, Accounts Payable uses Sage 300's Multiple Contacts features.

Prior to version 2020.1, Sage 300 Accounts Payable only stored a single contact for each vendor and only stores the contact's name, phone number, fax number, and e-mail address for the one contact.

By contrast, Extended Vendors lets you store as many as you require for older versions of Sage 300, by adding a list of contacts to the Contact tab of the Extended Vendors screen.

To add vendor contacts in Sage 300 2020.1 (PU1) and later:

• Select the Contact tab on the Extended Vendors form.

To add a new contact:

• Click in the Create New Contact button below the grid, and fill in the information on the form that appears.

To add an existing contact for this vendor:

• Click in the grid and press the insert key – as shown below.

🔾 Contact Code	Email		A/P Letters	P/O Purchase Or
RENCHBETH1	bethfrench@abf.com			X
LOANJOE1200	joesloan@abf.com			X
IPONDFRANCI	francisv@abf.com		х	Х
ECI 🤉				
h	3			
				-
		III		•

- Type the first few characters of the contact code, then click the Finder button.
- Select the contact from the Finder to add the contact.
- Select Recipients for standard accounting documents by double-clicking in the appropriate column (as shown above).

To delete an existing contact from this vendor:

Select the contact in the grid and press the Delete key.

Note that this will not delete the contact from Sage 300. To delete the contact from Sage, use the M/T Contacts program in Common Services.

To view all contact information:

• Select the contact and click the View Contact Details button below the grid.

To add vendor contacts in Extended Vendors for older versions of Sage 300:

- Select the Contact tab on the Extended Vendors form.
- Click in the grid below the contact fields, and press the insert key.

Address Contact	Processing	Invoicing Optional	Fields Statistics A	ctivit <u>v</u> Comments		
Contact Mrs. Beth Nishumura Anderson						
Telephone	one () -					
Fax	() -					
E-mail bethanderson@koyobearings.com						
Last Name	First Name	Title	Position	Phone (Mobile)	Phone (Office)	Phone (Other)
Jenner	Carmen	Ms	Sales Manag	er (778) 926-8175	(673) 978-3726	
	Frank	Mr	Salesperson	(778) 432-8292	(673) 987-3029	

- Add the information for each new contact.
- Click the Email heading to create a new email to the contact.

Office)	Phone (Other)	🖃 Email	Notes	Inactive	Date Inactive	Date Last Maintained
/8-3726		carmenj@tmail.c		No		
7-3029		frankk@tmail.com		No		

Copy Vendors to other Sage 300 companies

IMPORTANT:

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

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

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

Save Delete	Copy Vendors	Close

When the Copy Vendors button is pressed, a window will pop up for selecting the vendors in the source company.

ile <u>H</u> elp				
Vendor Range				
Select Vendors By		From	То	
(None)	•			
Additional Criteria]			Load
Include Vendor Number	Vendor Name		Short Name	Status On Hold
Include Vendor Number				

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

Specify a range of vendors for copying:

You can specify ranges for up to seven vendor fields to use for vendor selection – including the vendor number, group code, account set, terms, bank code, payment code, tax group, currency code, or any of the optional fields that you use for vendors.

Select Vendors By	From	То	
Vendor Number	•	Q ZZZZZZZZZZZZZ	Q
(None)			
(None)			
Group Code			
Account Set			
Terms			
Bank Code Payment Code			
Tax Group			
Currency Code			
AC#			
Accounts Payable Contact Type			
Disc Level			Load
Discount Grace Period			

Choose additional criteria:

	Additional Crite	ria	Load
Inclu	Q Set Crite	eria - Vendors	
	Column	Start Date	Add Delete
	Field	Start Date	
	Criteria	> 01102020	
	Or		

• Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting vendors that were added after a particular date. Click OK to save.

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

Add	itional Criteria			Load	
Include	Vendor Number	Vendor Name	Short Name	Status	On Hold
Yes	1400	Coastal Heating of Ottawa	COASTAL	Active	Not On Hold
Yes	1755	Eastern Sand Shore Enterprise	EAST_RN	Active	Not On Hold
Yes	1890	Raeside Equipment Ltd.	AESIDE	Active	Not On Hold
Yes	2300	Tomington Ltd.	TORR	Active	Not On Hold
Yes	4030	Megatronix Research Lab.	MEGA	Active	Not On Hold
Yes	5000	Deca Management	DECA	Active	Not On Hold
Yes	5030	Donald & Donald	DONALD	Active	Not On Hold
Yes	5080	Fred's Cleaning Services	FRED	Active	Not On Hold
Yes	7100	Stewart Office Supplies	STEWOFF	Active	Not On Hold
Yes	7200	Leon's Catering	LEON CAT	Active	Not On Hold
Yes	8950	Vulcan & Sons	VULCAN	Active	Not On Hold

• Click the Load button to display the list of vendors.

When the Load button is pressed, the program will display the vendors in the range and with the additional criteria you specified.

- You can adjust the 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 vendors loaded in the grid.

Select All	Select None
------------	-------------

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

Include	Vendor Number	Vendor Name	Short Name	Status	On Hold
No	1400	Coastal Heating of Ottawa	COASTAL	Active	Not On Hold
Yes	1755	Eastern Sand Shore Enterprise	EASTERN	Active	Not On Hold
Yes 🗸	1890	Raeside Equipment Ltd.	RAESIDE	Active	Not On Hold
Yes	2300	Torrington Ltd.	TORR	Active	Not On Hold

Click the Copy button to display the To Companies screen:

PTDEMO	- Extended Vendors			
<u>F</u> ile <u>H</u> elp				
Vendor Rang	je -			
Select Vendo	rs By	From	То	
	EMO - Copy A/P Vendo	ors to Companies		
(File H	lelp			
C Insert C				
	/endor Status			
	ompanies to Copy A/P Ve	ndors To		
E CDV	ck Approval Vancouver			
	nload Rates Demo			
	luctivity Tools Copy ple Company Inc.			
	ple Company Limited			
Ye				
Ye	Т			B I
Ye				
Nd				
Ne				B I
Nd				
N				
Ne	Seect All Se	lect None		8
No Progre	ss			i
	ору	Log	(Close
Select	A Select No	3 Vendors selected.		
Copy.				Close

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

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

For example, choose Update Only to update addresses and contact information for all existing vendors in the target companies.

Update Only	-	Update Vendor Name Only
Insert Only		
Update Only		
Insert and Update		17 Merchen To

- Choose whether to insert, insert and update, or just update vendors.
 - o Insert Only will only add codes if the code does not already exist.
 - Update Only will only update codes that do exist.
 - Insert and Update will perform both of these operations.
- If updating codes only, you can choose to update the vendor name only.

Choose whether to set the Vendor Status:

Select whether to copy vendors' statuses.

Update Only	▼ Update Vendor Name Only
Set Vendor Status	

- Inactive vendor can always be made active in another company.
- It may not be possible to make an active vendor inactive in the target company in which case, other information will be copied, but the status change failure will be logged and the program will continue to process other vendors.

Select target Sage 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

• Click the checkboxes to complete your company selections.

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

💌 PTDEMO - Copy A/P Vendo	rs to Companies	
<u>F</u> ile <u>H</u> elp		
Update Only - Up	date Vendor Name Only	
Select Companies to Copy A/P Ve	ndors To	
Check Approval Vancouver CPVINC CPVINT Download Rates Demo Productivity Tools Copy Sample Company Inc. Sample Company Limited	PTDEMO - Sage 300 Sign-on User ID ADMIN Password OK Cancel	
Select All Sel	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 vendors in the target companies for copying to proceed.

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

Click the Log button to confirm which vendors were processed:

```
8/7/2020 12:37:40 PM Copy A/P Vendors to Companies started.
8/7/2020 12:37:40 PM
8/7/2020 12:37:40 PM Performed by user: ADMIN
8/7/2020 12:37:40 PM
8/7/2020 12:37:40 PM Update Only
8/7/2020 12:37:40 PM Update Vendor Name Only: No
8/7/2020 12:37:40 PM Copy A/P Vendors to Companies: Sample Company Limited
8/7/2020 12:37:40 PM
8/7/2020 12:37:40 PM Copying vendors from Productivity Tools Demo to Sample Company Limited
started.
8/7/2020 12:37:40 PM
                           Logging in to Sample Company Limited...
8/7/2020 12:37:40 PM Updating vendor 1755...

      8/7/2020
      12:37:41
      PM
      Vendor updated.

      8/7/2020
      12:37:41
      PM
      Updating vendor 1890...

      8/7/2020
      12:37:41
      PM
      Vendor updated.

8///2020 12:37:41 PM Updating vendor 2300...
8/7/2020 12:37:41 PMVendor updated.8/7/2020 12:37:41 PMLogging off of Sample Company Limited...
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM There was 3 vendors updated.
8/7/2020 12:37:41 PM Copying vendors from Productivity Tools Demo to Sample Company Limited
complete.
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM
8/7/2020 12:37:41 PM Copy A/P Vendors to Companies complete.
8/7/2020 12:37:41 PM
_____
```

The Log lists:

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

Convert TPT Contacts to Sage 300 Multiple Contacts

If you upgraded to Sage 300 2020.1 (2020 with PU1 installed), you can take advantage of Sage 300's new Multiple Contacts.

The Sage 300 Multiple Contacts (M/T) program lets you to create contacts and assign them to A/R customers (including national accounts) and A/P vendors.

You can assign an unlimited number of contacts to a single customer or vendor, and you can assign a contact to multiple customers and vendors.

You can open the M/T Contacts screen to add new contacts from Common Services, or – more useful – open it from the TaiRox's Extended Customers and Extended Vendors screens.

Follow these steps to convert TaiRox Productivity Tools contacts to Sage 300 contacts

- **Step 1**: Activate Sage 300 Multiple Contacts using the Data Activation program in Administrative Services.
- Step 2: Run Convert Contacts in the TaiRox Productivity Tools folder on the Sage Desktop.



Step 3: Fill in the Convert Contacts screen and convert your existing contacts to Sage 300 MT contacts.

The conversion process assigns new contact codes to each of your existing TaiRox Productivity Tools contacts. You cannot convert contacts until you specify how the new codes will be constructed.

Note the following points:

 You must specify the fields from your existing contact records (segments) that will be used to create the new contact codes. <u>Each code must be unique</u>.

For example, the following settings will generate contact codes using the Last Name followed by the First Name of your existing customers -- with no extra spaces between last and first name.

A Sage 300 Contact Code has a Maximum Length of 24 Cha	racter
Trim Blanks From Segments Before Combining	•
Build the Contact Code From These Segments	
Last Name	•
First Name	•
(None)	•

- All of your existing contacts will be assigned to the customers/vendors to which they are currently assigned.
- You can use the following data to create contact codes:
 - o First Name
 - Last Name
 - o Customer Number/Vendor Number

You may require the customer or vendor number as part of the contact code if you previously used generic names for customer and vendor company contacts – such as "Sales," "Purchasing," "Payables," or "Receivables."

• The maximum length of a Sage 300 contact code is 24 characters.

This means that data will be truncated to fit into 24 characters.

• If you choose Last Name / First Name, and a contact has a long name like "Constantine Heathcote-Drummond," the first name will be truncated.

Using Fixed Length Segments

Conversion also lets you use a fixed number of letters from the first and last names – another typical way to assign codes for records.

- Choose "Use Fixed Length Segments" from the top dropdown.
- Specify the number of characters for each segment.
- Specify the character for filling out the segment length or specify None to remove extra spaces.

For example, the following screen uses 6 characters from the Last Name, First Name and Customer/Vendor Number, and it uses no filler characters.

SAMLTD - X/L Convert Contacts		□ ×
<u>F</u> ile <u>H</u> elp		
 A Sage 300 Contact Code has a Maximum Length of 24 Character Use Fixed Length Segments 	ers	
Build the Contact Code From These Segments		
Last Name 👻	Segment Code Length	6
First Name 👻	Segment Code Length	6
Customer Number/Vendor Number 🗸	Segment Code Length	6
	Contact Code Length	18
Segment Code Filler	(None)	
Convert Log		Close

A current contact name of "Fred Lee," customer 1200, would have a new contact code "LeeFred1200."

After conversion is complete, you can:

- Select which contacts are recipients of accounting documents such as A/P Letters, P/O Purchase Orders, and P/O Returns.
- Link existing contacts to additional companies.
- Edit converted contacts in Common Services or by opening the contact record from the Extended Customers and Extended Vendors screens.