

Productivity Tools Demo Guide

TaiRox Productivity Tools activation provides access to dozens of tools, which can be confusing when demonstrating specific product features to a client or prospect.

Use the Options program Menu tab to hide productivity tools that are not relevant to users.

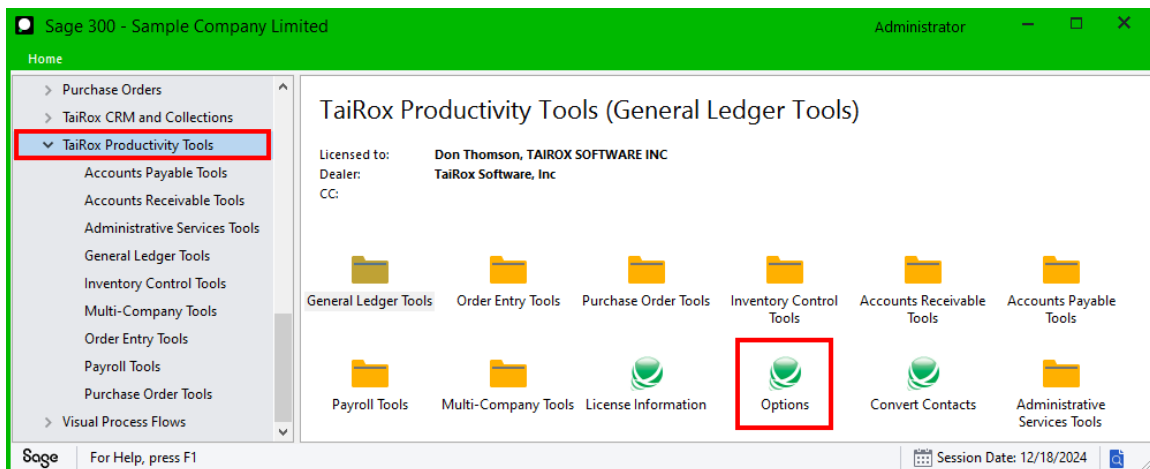
Important Notes:

The Options program is only available to the Sage 300 ADMIN user. Changes are site-wide, meaning that they apply to all Sage 300 companies, even though the edits are done while logged into a single company's desktop.

- For more information on the TaiRox suite of Productivity Tools, see <https://www.tairox.com/tairox-productivity-tools-for-sage-300-erp-accpac.html>

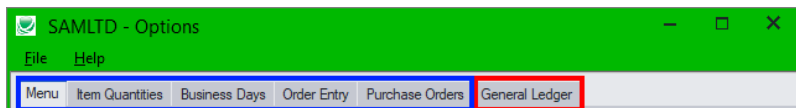
Hiding TaiRox Productivity Tools

Choose the Options program from the top-level of the Productivity Tools menu:



The Productivity Tools Option screen displays five or six tabs, depending on your version of TaiRox Productivity Tools.

Note that the General Ledger tab will **not** appear unless you have an Enterprise License for TaiRox Productivity Tools.



- Menu tab:** Lets you hide productivity tools that are not used by your company.
- Item Quantities tab:** Lets you choose which locations and Sage 300 companies are included when you view item quantities in Extended PO Entry, Extended PO Receipt Entry, Extended Order Entry, and Extended Shipment Entry.

- **Business Days tab:** Lets you specify your company's regular business days and additional non-business days – such as statutory holidays and closures for inventory counts.

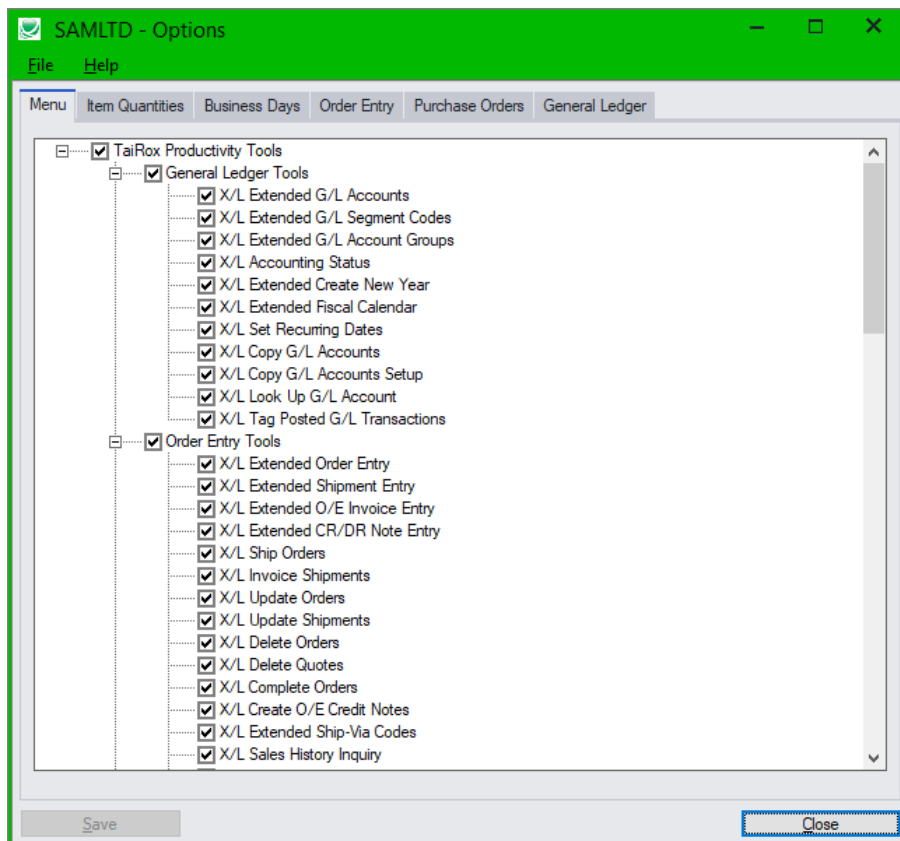
Productivity Tools uses the regular business days and non-business days to calculate Order Entry's expected ship date and deliver by date in the Extended Order Entry program. You set the number of business days for the ship date and deliver by date on the Order Entry tab.

- **Order Entry tab:** Lets you display customer optional fields on the Order Entry and Shipment Entry screens, require orders and shipments to include a purchase order number, warn for customer PO numbers that were used on previous orders or shipments, show totals for a selected unit of measure, include line discounts in margin and markup calculations, require a valid ship-to location code, prevent users from changing the ship-to address on orders and shipments, calculate Order Entry's deliver by date and expected ship date, and default the quantity committed to the quantity ordered in Extended Order Entry for select customers.
- **Purchase Orders tab:** Lets you display vendor optional fields on the PO Entry and Receipt Entry screens and require receipts to include a purchase order number. It also lets you link PO lines created from an order to the original order lines – for use with reports or program additions – and show totals for a selected unit of measure.
- **General Ledger tab:** Lets you specify an optional field for tagging posted G/L transactions. Note that this tab will not appear unless you have an Enterprise License for TaiRox Productivity Tools.

The Menu tab shows all TaiRox Productivity Tools – irrespective of the activation code in use.

To Hide Productivity Tools:

- Deselect tools that you want to remove from the Sage Desktop. Tools are listed by accounting application.



- Close and re-open the Sage 300 company to have the new settings take effect.