



Productivity Tools

User Guide

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Summary and Overview

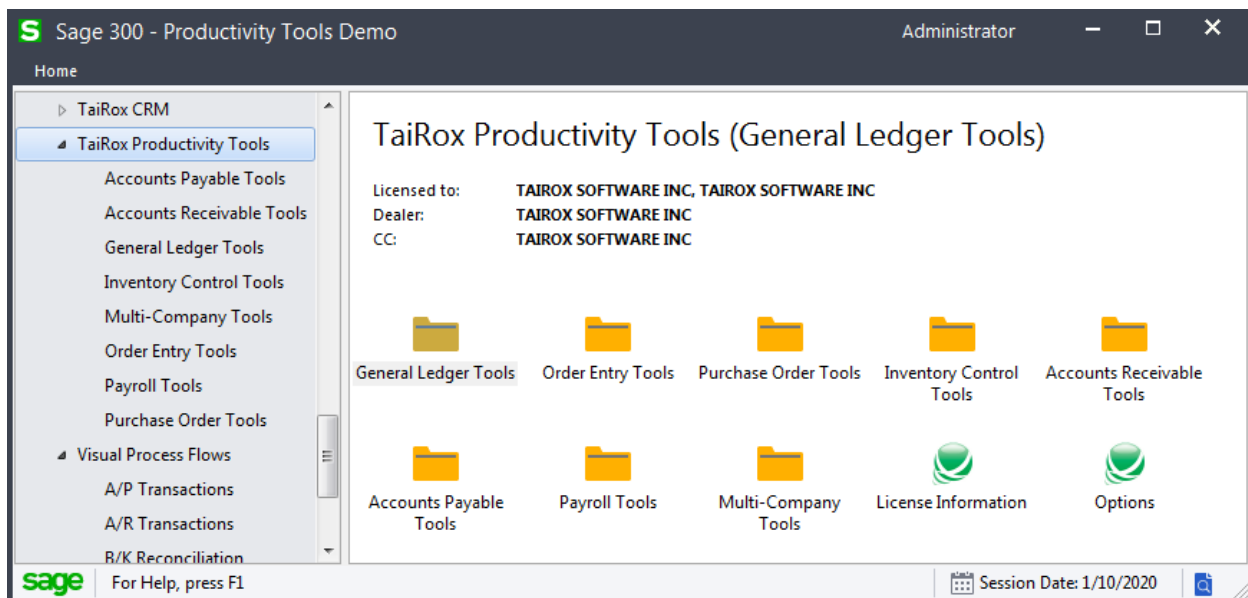
TaiRox Productivity Tools extend the core functionality of Sage 300.

- All Productivity tools are written as "Sage 300 SDK Applications", and integrate seamlessly with the Sage 300 desktop, activation and security features.
- All tools operate on the standard "entities" of the Sage 300 accounting system - accounts, customers, vendors, orders, purchase orders, and so on.

The individual user guides listed below provide summary and how-to-use documentation for all TaiRox Productivity Tools.

The productivity tools are listed by module, as they appear on the Sage 300 desktop.

To view an individual user guide, Ctrl+Click on the hyperlinks in this document.



The last group, Multi-Company Tools, is a collection of all tools that copy entities from one company to many.

General Ledger Tools	Specific Benefits
Extended G/L Accounts	Copies G/L accounts, changing segments, from one company to many. Includes many options for account filtering and to increase speed & safety. Logs all changes. One "master company" is required for each functional currency in use.
Extended G/L Segment Codes	Copies segment codes from one company to many.
Extended G/L Account Groups	Copies account groups from one company to many.
Accounting Status	Shows period-end status with drill-down in a single window.
Extended Fiscal Calendar	Copies calendars from one company to many. Supports per-module locking.

General Ledger Tools	Specific Benefits
Extended Create New Year	Creates a new year in multiple companies.
Set Recurring Dates	Resets incorrectly entered last-run-dates.
User Management	Copies permissions and setup from one user to another.

Payroll Tools	Specific Benefits
Sync Timecards	Synchronizes timecard data with updated master table entries. Includes many options to filter employees. Logs all changes.
Mail Merge	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE/YES instead of 1 for boolean fields. Merges calculated fields. Eliminates guesswork by providing meaningful field names.

Accounts Receivable Tools	Specific Benefits
Extended Customers	Copies customers from one company to many. Maintains multiple contacts per customer. Includes many options to filter customers and increase speed & safety. Logs all changes. SmartFinder searches for customers like an internet search engine. Will optionally enforce Country, State and Province codes.
Extended Customer Inquiry	Adds SmartFinders, Google Map integration, multiple contacts and other functionality to Customer Inquiry. SmartFinder searches for vendors like an internet search engine.
Extended Ship-To Locations Extended Ship-To Location	SmartFinder searches for customers like an internet search engine. Will optionally enforce Country, State and Province codes.
Apply Documents	Matches and applies unapplied documents to invoices. Supports manual and auto-apply matching. A payment grid & an invoice grid maximize visibility. Automated matches can be overridden manually with one click.
Mass Billing	Creates a large number of invoices for a single A/R item. Includes many options to annotate invoice batches. Logs all changes.
Mail Merge	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE/YES instead of 1 for boolean fields. Merges calculated fields. Eliminates guesswork by providing meaningful field names.

Accounts Payable Tools	Specific Benefits
Extended Vendors	Copies vendors from one company to many. Maintains multiple contacts per vendor. SmartFinder searches for vendors like an internet search engine. Will optionally enforce Country, State and Province codes.

Accounts Payable Tools	Specific Benefits
<u>Vendor Inquiry</u>	Adds 20 dynamic tabs of information for managing purchases. SmartFinder searches for vendors like an internet search engine. Vendor Document Inquiry adds 7 additional tabs of information about vendor documents and is launched from Vendor Inquiry.
<u>Extended Remit-To Locations</u> <u>Extended Remit-To Location</u>	SmartFinder searches for vendors like an internet search engine. Will optionally enforce Country, State and Province codes.
<u>Mail Merge</u>	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE/YES instead of 1 for boolean fields. Merges calculated fields. Eliminates guesswork by providing meaningful field names.
<u>Extended Create Payment Batch</u>	Enables more than one system generated batch to be unposted. Creates payments for selected invoice batch.

Inventory Control Tools	Specific Benefits
<u>Extended Inventory Items</u>	Copies items, changing segments, from one company to many. Includes many options to filter and increase speed & safety. Logs all changes. An Item In Use button shows all DB table references to an item. SmartFinder searches for items like an internet search engine.
<u>Extended Locations</u>	Copies locations from one company to many and provides links to Google Maps and email clients.
<u>Extended Vendor Details</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Customer Details</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Manufacturer' Items</u>	SmartFinder searches for items like an internet search engine.
<u>Extended Item Pricing</u>	Copies prices from one company to many. SmartFinder searches for items like an internet search engine.
<u>Extended IC Segment Codes</u>	Copies segment codes from one company to many.
<u>Stock Reorder</u>	Performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions.
<u>Mail Merge</u>	Creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE/YES instead of 1 for boolean fields. Merges calculated fields. Eliminates guesswork by providing meaningful field names.
<u>Fix Item Valuation Errors</u>	Repairs specific item valuation errors in your data.
<u>Delete Items</u>	Provides a way to see all inventory items that are safe to delete. Checks for known third-party references to items. Deletes items when safe to delete.

Order Entry Tools	Specific Benefits
<u>Extended Order Entry</u>	An enhanced item finder shows prices, quantities and comments. Print picking slips, invoices, quotes & confirmations from entry form. Edit kit details without creating hundreds of kit numbers in inventory control. Add or delete a few items from a base kit, edit quantities and more. While viewing history, selects line details from previous orders. A ship button displays picked items in picking slip order. SmartFinder searches for orders, customers and items like an internet search engine. The entry grid shows margins and most recent costs. An update button enables multi-faceted changes to be made to an order. Change Kit and BOM numbers, Expected Ship Dates, Item Prices, Addresses, Deliver By Date. Commit and Uncommit quantities. Substitute one item for another.
<u>Extended Shipment Entry</u>	Shows prices, quantities and comments when selecting items. A ship button displays picked items in picking slip order. Settings enable quick printing of picking slips without showing intermediate windows. SmartFinder searches for shipments, customers and items like an internet search engine. The entry grid shows margins and most recent costs.
<u>Ship Orders</u>	Ships hundreds of orders, optionally invoicing at the same time.
<u>Invoice Shipments</u>	Invoices hundreds of shipments.
<u>Update Orders</u>	Updates BOMs, kits or items for hundreds of orders. Updates prices from price lists for hundreds of orders. Updates expected ship dates for hundreds of orders.
<u>Update Shipments</u>	Updates prices or ship dates for hundreds of shipments.
<u>Delete Orders</u>	Deletes old orders to correct item quantities and speeds up day-end.
<u>Delete Quotes</u>	Deletes thousands of old quotes and speeds up day-end.
<u>Complete Orders</u>	Completes old orders that will never be filled, correcting quantities.
<u>Extended Ship-Via Codes</u>	Copies Ship-Via Codes from one company to many and provides links to Google Maps and email clients.
<u>Sales History Inquiry</u>	Quickly finds most recent costs and prices for an item.

Purchase Order Tools	Specific Benefits
<u>Extended PO Entry</u>	Shows item quantity information just like on the Order Entry screen. While viewing history, selects line details from previous POs. SmartFinder searches for POs, vendors and items like an internet search engine.

Purchase Order Tools	Specific Benefits
<u>Extended PO Receipt Entry</u>	Shows item quantity information just like on the Order Entry screen. A receive button displays items on the PO in several different sort orders. Drop-ship to dozens of detail lines in a single operation. Display quantities available at other locations or in other companies while entering a receipt. SmartFinder searches for receipts, vendors and items like an internet search engine.
<u>Extended PO Invoice Entry</u>	Shows all receipts related to a vendor so they can be quickly matched to an invoice. A vendor is related to a receipt if they are the primary vendor or an additional cost vendor. SmartFinder searches for invoices, vendors and receipts like an internet search engine.
<u>Stock Reorder</u>	Performs reorder calculations, previews with errors (e.g. no item vendor). Saves display grid to Excel and reloads edited spreadsheet. Creates either purchase orders or requisitions.
<u>Update Purchase Orders</u>	Updates vendor costs for hundreds of purchase orders. Updates expected arrival dates for hundreds of purchase orders.
<u>Delete Purchase Orders</u>	Deletes old purchase orders to correct item quantities
<u>Complete Purchase Orders</u>	Completes old purchase orders, correcting item quantities
<u>Complete Zero Receipts</u>	Finds and completes purchase order receipts with zero cost

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<u>Extended Vendors</u>	Copies vendors from one company to many. Maintains multiple contacts per vendor. Includes many options for filtering vendors and increasing speed & safety. Logs all changes. SmartFinder searches for vendors like an internet search engine.

Multi-Company Tools	Specific Benefits
<u>Extended Inventory Items</u>	Copies items, changing segments, from one company to many. Includes many options for filtering items and increasing speed & safety. Logs all changes. An Item In Use button shows all table references to an item. SmartFinder searches for items like an internet search engine.
<u>Extended Locations</u>	Copies Locations from one company to many and provides links to Google Maps and email clients.
<u>Extended Item Pricing</u>	Copies prices from one company to many. SmartFinder searches for items like an internet search engine.
<u>Extended IC Segment Codes</u>	Copies segment codes from one company to many.
<u>Extended Ship-Via Codes</u>	Copies ship-via codes from one company to many and provides links to Google Maps and email clients.