



Productivity Tools

User Guide

Copyright © 2009-2018 TaiRox Software, Inc. All rights reserved.

Important Notice

TaiRox does not warrant or represent that your use of this software product will be uninterrupted or error-free or that the software product can be run with any other version of Sage ERP Accpac other than 5.6A, 6.0A, or any version of Sage 300 other than 2012, 2014, 2016, 2017, 2018 or 2019 or that the information in this document is completely accurate. TaiRox warrants that any media by which you have received this software is free from defects. TaiRox will replace any such defective media. TaiRox expressly disclaims all other warranties, representations, conditions and guarantees of any kind including, but not limited to warranties for merchantability or fitness for a particular use.

Summary and Overview

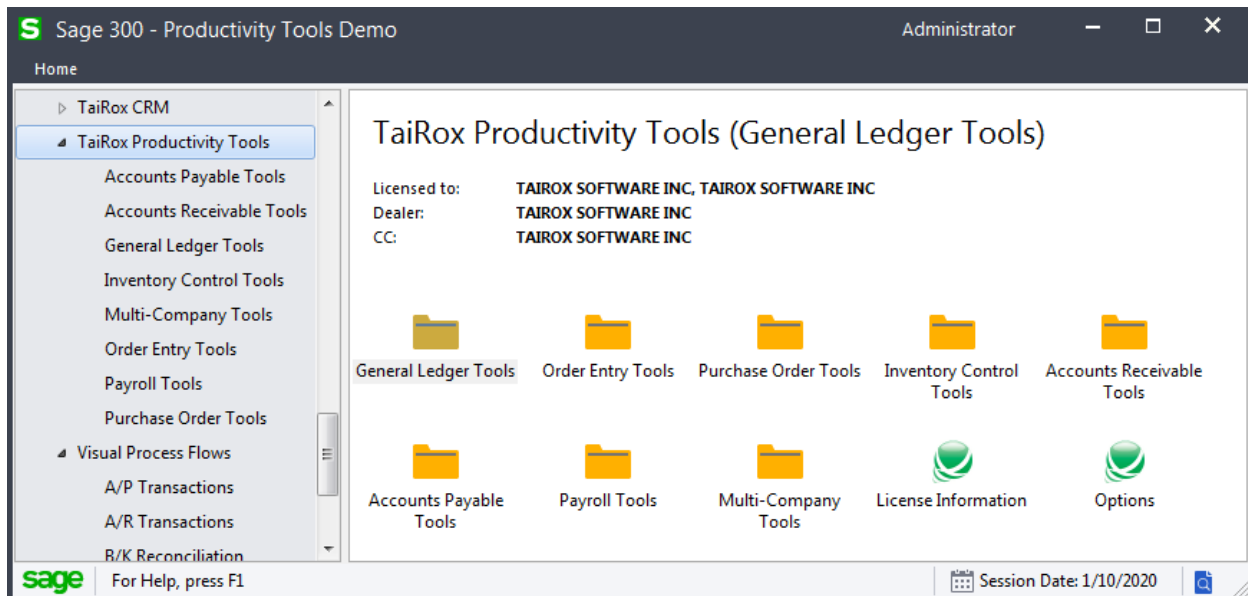
TaiRox Productivity Tools extend the core functionality of Sage 300.

- 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.

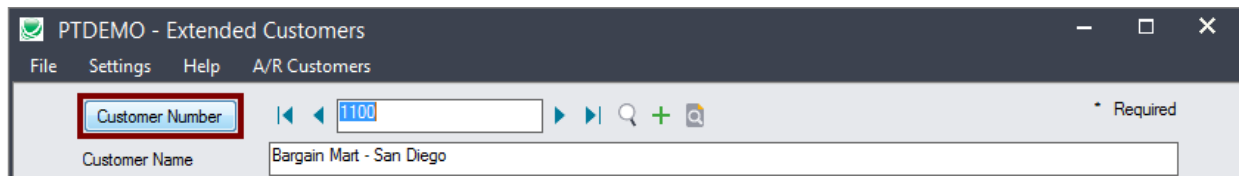
The productivity tools are listed by module, as they appear on the Sage 300 desktop.

To view an individual user guide, click on the hyperlinks in this document.



Productivity Tools add hundreds of features to Sage 300, the features listed by module on the following pages.

Dozens of SmartFinders are placed throughout the Productivity Tools programs. SmartFinders search for customers, vendors and items like an internet search engine, matching multiple parts of multiple fields. Watch: [Customer Search](#)



There are also many links to Google Maps, web sites and email clients placed throughout the tools. Watch: [Google Map, Website and Email Integration](#)

General Ledger Tools

- Maintain the same chart of accounts across multiple companies
- Show every task that needs attention before month end
- Manage calendars and fiscal years for dozens of companies

[Extended G/L Accounts](#) copies accounts, changing segments, from one company to many, including many options to filter, log changes, increase speed and safety. Watch: [Extended G/L Accounts](#)

[Extended G/L Segment Codes](#) copies Segment Codes from one company to many.

[Extended G/L Accounts Groups](#) copies Account Groups from one company to many.

[Accounting Status](#) shows period-end status in a single window. Watch: [Accounting Status](#)

[Extended Fiscal Calendar](#) copies calendars from one company to many. Supports per-module locking. Watch: [Extended Fiscal Calendar](#)

[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.

Accounts Receivable Tools

- Maintain the same customers across multiple companies
- Match and apply multiple unapplied payments to invoices
- Enforce country, state and province codes as an entry option

[Extended Customers](#)* copies customers from one company to many. Maintains multiple contacts per customer. Includes many options to filter, log changes, increase speed & safety. Will optionally enforce Country, State and Province codes. Watch: [Extended Customers](#)

[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. Watch: [Apply Documents for Sage 300 A/R](#)

[Extended Customer Inquiry](#)* adds SmartFinders, Google Map integration, multiple contacts and other functionality to Customer Inquiry.

[Extended AR Receipt Entry](#)* searches for a customer by invoice number providing a solution for the receipt of a payment that identifies an invoice, but does not identify a customer.

[Mass Billing](#) creates a large number of invoices for a single A/R item. Includes many options to annotate invoice batches, logs all changes. Watch: [Mass Billing](#)

[Mail Merge](#) creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names. Watch: [Mail Merge](#)

[Extended Ship-To Locations](#)* provides access to [Extended Ship-To Location](#)*, which will optionally enforce Country, State and Province codes.

* SmartFinder searches like an internet search engine.

Accounts Payable Tools

- Show everything related to a vendor in one place (Vendor Inquiry)
- Maintain the same vendors across multiple companies
- Enforce country, state and province codes as an entry option

[Extended Vendors](#)* copies vendors from one company to many. Maintains multiple contacts per vendor. Will optionally enforce Country, State and Province codes. Watch: [Extended Vendors](#)

[Vendor Inquiry](#)* 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. [Vendor Inquiry](#)

[Extended Create Payment Batch](#) enables more than one system generated batch to be unposted.

[Mail Merge](#)* creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names. Watch: [Mail Merge](#)

[Extended Remit-To Locations](#)* provides access to **[Extended Remit-To Location](#)***, which will optionally enforce Country, State and Province codes.

* SmartFinder searches like an internet search engine.

Inventory Control Tools

- Maintain the same item across multiple companies
- Perform stock reorder calculations with export/import to Excel
- Delete items or BOMs no longer in use

[Extended Inventory Items](#) copies items, changing segments, from one company to many. Includes many options to filter, log changes, increase speed & safety. An Item In Use button will show all table references to an item. SmartFinder searches for items like an internet search engine.

[Extended Locations](#) copies Locations from one company to many and provides links to Google Maps and email clients.

[Extended I/C Segment Codes](#) copy segment codes from one company to many

[Extended Vendor Details*](#), [Extended Customer Details*](#), [Extended Manufacturers' Items*](#)

[Extended Item Pricing*](#) copies prices from one company to many.

[Stock Reorder](#) 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.

[Mail Merge](#) creates mail-merge documents directly from Sage 300. Simplifies operation by eliminating export and data source setup. Merges ACTIVE instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.

[Delete Items](#) 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.

[Delete BOMs*](#) provides a way to delete hundreds of old or unused Bills-of-Material (BOMs) in one operation.

[Fix Item Valuation Errors](#) repairs item valuation errors in your data.

* SmartFinder searches like an internet search engine.

Order Entry Tools

- Add dozens of powerful operations to the order entry form
- Ship hundreds of orders in, invoice hundreds of shipments in one operation
- Update hundreds of orders in one step, in dozens of different ways

[Extended Order Entry](#)* shows prices, quantities and comments in a finder. Shows margins and most recent costs. Prints picking slips, invoices, quotes & confirmations. Edit kit details on an order. Views history, selecting line details from previous orders. Displays picked items in picking slip order. Shows quantities available at other locations or companies. An update button enables multi-faceted changes to be made to all lines in an order. Watch: [Extended Order Entry](#)

[Extended Shipment Entry](#)* shows prices, quantities and comments when selecting items. Shows margins and most recent costs. A ship button displays picked items in picking slip order. Settings enable quick printing of picking slips without showing intermediate windows. Displays quantities available at other locations or companies.

[Extended Ship-Via Codes](#) copies Ship-Via Codes from one company to many and provides links to Google Maps and email clients.

[Ship Orders](#) ships hundreds of orders, optionally invoicing at the same time. Watch: [Ship Orders](#)

[Invoice Shipments](#) invoices hundreds of shipments with many consolidation options. Watch: [Invoice Shipments](#)

[Update Orders](#) updates BOMs, kits or items for hundreds of orders. Updates prices from price lists, expected ship dates, deliver by dates, on hold status and customer addresses. Watch: [Update Orders](#)

[Update Shipments](#) updates prices or ship dates for hundreds of shipments.

[Delete Orders](#) deletes old orders to correct item quantities and speed up day-end. Watch: [Delete Orders](#)

[Delete Quotes](#) deletes thousands of old quotes and speeds up day-end. Watch: [Delete Quotes](#)

[Complete Orders](#) completes old orders that will never be filled, correcting quantities. Watch: [Complete Orders](#)

[Sales History Inquiry](#)* quickly finds most recent costs and prices for an item.

* SmartFinder searches like an internet search engine.

Purchase Order Tools

- Add many powerful operations to the PO entry and receipt entry forms
- Update hundreds of purchase orders in one step, in dozens of different ways
- Complete or delete old purchase orders, updating inventory quantities

[Extended PO Entry](#)* shows item quantity information just like on the order entry screen. While viewing history, selects line details from previous POs. Display quantities available at other locations or in other companies while entering a purchase order. Watch: [Extended PO Entry](#)

[Extended PO Receipt Entry](#) 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 and vendors and items like an internet search engine.

[Extended PO Invoice Entry](#) shows all receipts related to a vendor so that they may be quickly matched to an invoice. A vendor is related to a receipt if they are the primary vendor or an additional cost vendor.

[Stock Reorder](#) 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. Watch: [Stock Reorder](#)

[Update Purchase Orders](#) updates vendor costs for hundreds of purchase orders. Updates expected arrival dates for hundreds of purchase orders.

[Delete Purchase Orders](#) deletes old purchase orders to correct item quantities. Watch: [Delete Purchase Orders](#)

[Complete Purchase Orders](#) completes old purchase orders, correcting item quantities. Watch: [Complete Purchase Orders](#)

[Complete Zero Receipts](#) finds and completes purchase order receipts with zero cost. Watch: [Complete Zero Receipts](#)

* SmartFinder searches like an internet search engine.

Payroll Tools

- Synchronize timecard data to an updated master table
- Send mail-merged letters to employees with field names

[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 instead of 1, calculated fields. Eliminates guesswork by providing meaningful field names.