



# Productivity Tools

## User Guide

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# Summary and Overview

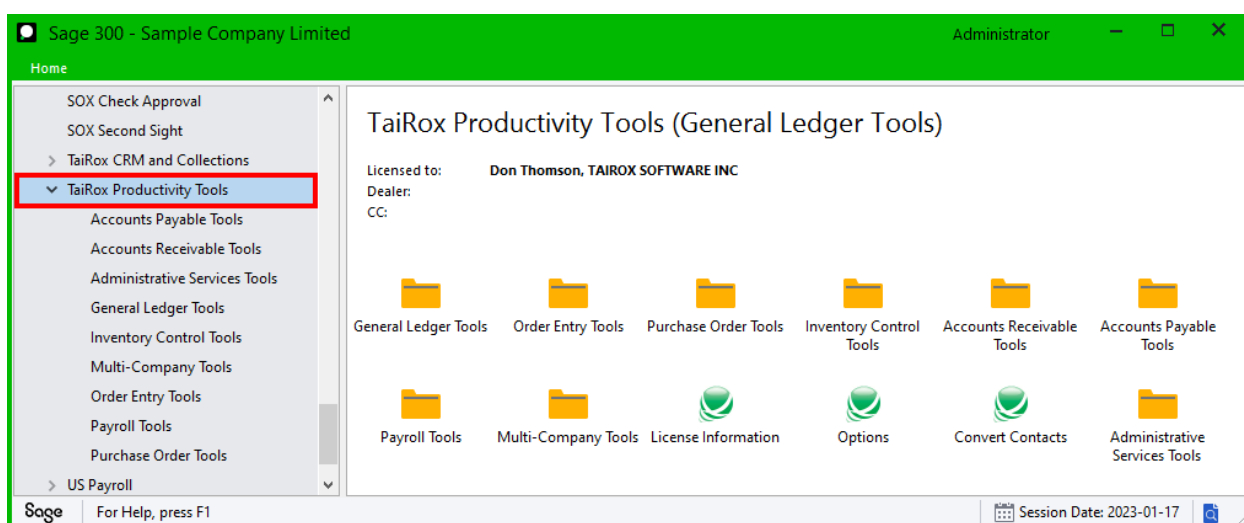
TaiRox Productivity Tools extend the core functionality of Sage 300. For a quick review, watch [TaiRox Productivity Tools for Sage 300 - Overview](#).

- 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.

Click the hyperlinks in this document to view individual user guides and product demos.



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



There are also many links to Google Maps, web sites and email clients placed throughout the tools.

Watch: [SmartFinders and Google Map, Website and Email Integration](#).

Watch: [Smart Finders for Sage 300 Web Screens](#)

## Productivity Tools Installation Guide

- Provides instructions for installing TaiRox Productivity Tools on the Sage 300 Desktop and for installing TaiRox Productivity Tools Web Screens.

[Productivity Tools Installation Guide.pdf](#)

## Productivity Tools Options

TaiRox Productivity Tools Options lets you:

- Hide productivity tools that are not used by your company.
- Choose which locations and Sage 300 companies to include when you view item quantities in Extended Order Entry, Extended Shipment Entry, Extended PO Entry, and Extended PO Receipt Entry,  
These programs can display item quantities available at other locations in the same Sage 300 company and in other Sage 300 companies.
- Display customer optional fields on the Extended Order Entry and Extended Shipment Entry screens, require orders and shipments to include purchase order numbers, warn if customer PO numbers were previously used on orders and shipment, show totals for a selected unit of measure, include line discounts in margin and markup calculations, require a valid ship-to location code, and prevent users from changing the ship-to address on orders and shipments.
- Display vendor optional fields on the Extended PO Entry and Extended PO Receipt Entry screens, require PO receipts to include purchase order numbers, link PO lines created from an order to the original order lines, and show totals for a selected unit of measure.

[Productivity Tools Options User Guide.pdf](#)

## Administrative Services Tools

- Efficiently manage user setup and permissions for a Sage 300 company database

[User Management](#) creates a User Permission report for all Sage 300 users and applications, and copies permissions and setup from one user to another. Watch: [User Management](#)

[Application Security](#) lets you see which security authorizations are required to use Sage 300 programs. It answers the question, “why don’t I see this icon on my desktop?” Watch: [Application Security](#)

Note that Administrative Services Tools will appear only if you have an Enterprise License for TaiRox Productivity Tools.

## 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

[Copy G/L Accounts](#) and [Copy G/L Accounts Setup](#) are Productivity Tools Enterprise Programs that manage the setup and copying operations needed to support a multi-company general ledger. Segment filtering and substitution rules are defined per target company and stored in a template company's database. Based on those rules, you can add new accounts to all target companies in a single step. Watch: [Copy G/L Accounts](#)

Note that the Copy G/L Accounts and Copy G/L Accounts Setup icons will appear only if you have an Enterprise License for TaiRox Productivity Tools.

[Look Up G/L Account](#) is a Productivity Tools Enterprise Program for quickly looking up a G/L account using the account text fields, such as the account description, structure code, or segment name.

The Look Up G/L Account icon will appear only if you have an Enterprise License for Productivity Tools. Watch: [Look Up G/L Account](#)

[Tag Posted G/L Transactions](#) is a Productivity Tools Enterprise Program for tagging posted transactions using a text optional field that is associated with General Ledger Transaction Details.

[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. Watch: [Extended G/L Accounts](#)

[Extended G/L Account 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.

## 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](#)

**[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.

**[Extended Ship-To Locations](#)**\* provides access to **[Extended Ship-To Location](#)**\*, which 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. Watch: [Apply Documents for Sage 300 A/R](#)

**[Create A/R Credit Notes](#)** lets you quickly reverse accounts receivable invoices, debit notes, or interest payments that were applied to customer accounts.

**[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](#)

**[Create Price List](#)** is a Productivity Tools Enterprise Program that generates a spreadsheet with an individual customer's prices using the customer's I/C price list selection, customer type, and contract pricing.

Note that the Create Price List icon will appear only if you have an Enterprise License for TaiRox Productivity Tools. Watch: [Create Price List](#)

**[Update Customers](#)** lets you change the salesperson or hold status for dozens or hundreds of customers at a time. You can select customers using ranges of up to 7 customer record fields and customer optional fields – for example, letting you narrow in on customers with a particular “Salesperson 2”.

\* 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. Watch: [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. Provides drilldown to all I/C item information. Watch: [Extended Inventory Items](#)

[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 Location Details\\*](#), [Extended Manufacturers' Items\\*](#), [Extended Reorder Quantities\\*](#)

[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. Watch: [Stock Reorder](#)

[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](#)

[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. Watch: [Fix Item Valuation](#)

\* SmartFinder searches like an internet search engine.

[Kit Component Usage Inquiry](#) lets you quickly list kits where items appear as components, drill down to kit components, and change them if necessary.

[Remove Items from Price Lists](#) is a Productivity Tools Enterprise Program that lets you select inventory items using ranges of item fields including item number, item structure code, category code, account set code, default price list code, and item status, and remove them from multiple price lists and customer contract pricing in a single operation. The program also removes contract pricing for a range of customers. Watch: [Remove Items from Price Lists](#)

## Order Entry Tools

- Add dozens of powerful operations to the order entry form
- Ship hundreds of orders, invoice hundreds of shipments in one operation
- Update hundreds of orders in one step, in dozens of different ways
- Includes Web desktop versions of Extended Order Entry, Extended Shipment Entry, Complete Orders, Delete Orders, Delete Quotes, Ship Orders, Invoice Shipments, and Update Orders.

**[Extended Order Entry](#)**\* shows prices, quantities and comments in a finder. Shows margins and most recent costs. Prints picking slips, invoices, quotes & confirmations. Displays select customer optional fields on the entry screen. Edits 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](#) and [Extended Order Entry for Sage 300cloud](#)

**[Extended Shipment Entry](#)**\* shows prices, quantities and comments when selecting items. Shows margins and most recent costs. Displays select customer optional fields. 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. Watch: [Extended Shipment Entry for Sage 300cloud](#)

**[Extended OE Credit/Debit Note](#)**\* creates credit notes and debit notes that are not tied to a particular Order Entry invoice. Includes item finders, detail line finders, and credit/debit note creation from past orders. Displays select customer optional fields.

**[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](#) and [Ship Orders for Sage 300cloud](#)

**[Invoice Shipments](#)** invoices hundreds of shipments with many consolidation options. Watch: [Invoice Shipments](#) and [Invoice Shipments for Sage 300cloud](#)

**[Shipment Picking Slips](#)** provides greater flexibility for printing picking slips, letting you select shipments using ranges of shipments, customers, and optional fields, then cherry-pick the results before printing.

**[Email Packing Slips](#)** lets you send packing slips to customers when orders are shipped. You can email packing slips for a range of shipments, or you can email packing slips when you post shipments. Watch: [Email Packing Slips](#)

**[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 for Sage 300](#) and [Update Orders for Sage 300cloud](#)

**[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](#) and [Delete Orders for Sage 300cloud](#)

**[Delete Quotes](#)** deletes thousands of old quotes and speeds up day-end. Watch: [Delete Quotes](#) and [Delete Quotes for Sage 300cloud](#)

**[Complete Orders](#)** completes old orders that will never be filled, correcting quantities. Watch: [Complete Orders for Sage 300](#) and [Complete Orders for Sage 300cloud](#)



[\*\*Customer Backorders\*\*](#) lets you quickly find all outstanding backordered items for a customer – on multiple orders. The program lets you select search orders by a range of order dates, and provides a SmartFinder for quickly looking up customer numbers.

[\*\*Create O/E Credit Notes\*\*](#) quickly reverses Order Entry invoice details that were applied to customer accounts. You can return items to inventory, receive items as damaged, or adjust invoice prices. Watch: [\*\*Create O/E Credit Notes\*\*](#)

[\*\*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
- Includes Sage 300cloud Web desktop versions of Complete Purchase Orders, Delete Purchase Orders, Complete Zero Receipts, and Update Purchase Orders.

**[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. Displays select vendor optional fields on the entry screen. 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. Displays select vendor optional fields on the entry screen.

**[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 and arrival dates, substitutes items, and changes on-hand status for hundreds of purchase orders. Watch [Update Purchase Orders for Sage 300cloud](#)

**[Delete Purchase Orders](#)** deletes old purchase orders to correct item quantities. Watch: [Delete Purchase Orders](#) and [Delete Purchase Orders for Sage 300cloud](#)

**[Complete Purchase Orders](#)** completes old purchase orders, correcting item quantities. Watch: [Complete Purchase Orders](#) and [Complete Purchase Orders for Sage 300cloud](#)

**[Complete Zero Receipts](#)** finds and completes purchase order receipts with zero cost. Watch: [Complete Zero Receipts](#) and [Complete Zero Receipts for Sage 300cloud](#)

\* 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. Watch: [Mail Merge](#)

## Productivity Tools Frequently Asked Questions (FAQ)

**[Productivity Tools FAQ](#)** provides additional information on installing and upgrading TaiRox Productivity, as well as answers to commonly asked questions for all TaiRox Productivity Tools.