

Vendor Inquiry

Vendor Inquiry provides a convenient way to view data related to a Sage 300 vendor. Each tab focuses on one aspect of the vendor's data.

Note that some tabs and features shown below may not be available in your company, depending on which Sage 300 modules you use.

For example: the data available in Vendor Inquiry depends on:

- Whether or not PO is installed
- Whether PO is using IC items or is stand-alone
- The permissions of the user
- Whether or not specific TaiRox Productivity Tools are enabled

The following screen displays all 20 Vendor Inquiry tabs. The Vendor No button provides access to a “SmartFinder” search function that searches multiple columns in both vendor and remit-to locations and displays all matches – like a modern browser search engine.

PTDEMO - Vendor Inquiry

File Settings Help

Vendor No. 1200 Chloride Systems Vendor Currency USD

Pending Requisitions POs PO Receipts PO Invoices PO Returns PO CR/DR Purchases Aging Items

Profile Address Comments Optional Flds. Remit-To Recur. Payables Activity Documents Payments Adjustments

Short Name CHLORIDE Start Date 11/08/2008

Legal Name Last Maintained 03/15/2013

Group Code INV Inventory Purchases Active / /

Account Set USA Accounts payable, Other On Hold

Rate Type SP

Bank Code SEATAC Seattle Tacoma Bank

Payment Code CHECKUSD USD check Seattle Tacoma Bank

Check Language

Delivery Method Mail

Terms DUETBL Due by Invoice Date

Retainage Terms

Retainage % 0.00000

Retention Period 0

Tax Group USDTAX US Sales Tax - Purchase

Tax Authority	Authority Descri...	Tax Class	Class Description	Registration Number	Tax Included
STATE	State Tax	1	Taxable item		No
COUNTY	County Tax	1	Taxable merchandise		No

Vendor Account Status

Outstanding Balance 8,191.11 No. of Open Invoices 11

Prepayment Amount -550.75 No. of Prepayments 4

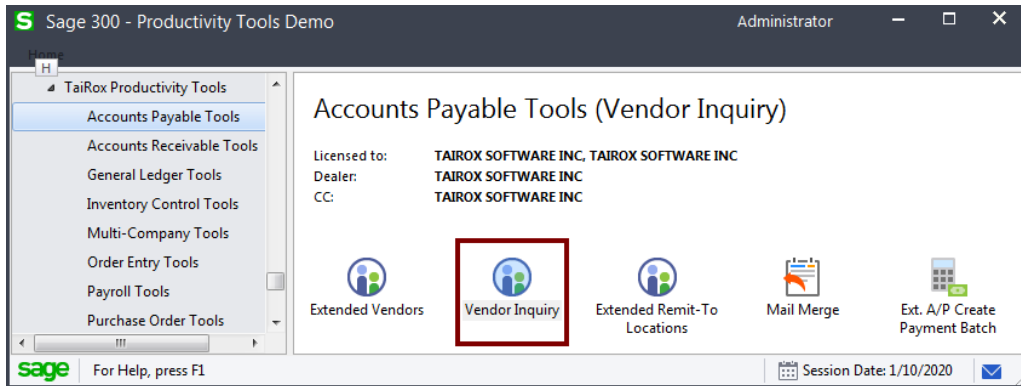
Outstanding Retainage 0.00

Credit Limit 5,000.00

Refresh Close

Using Vendor Inquiry

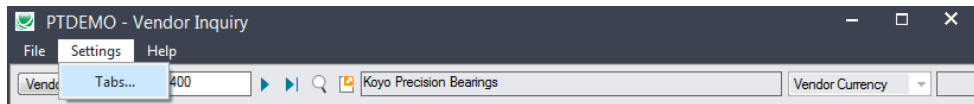
The Vendor Inquiry icon appears under **TaiRox Productivity Tools > Accounts Payable Tools** on the Sage 300 desktop and can be copied to other menu locations.



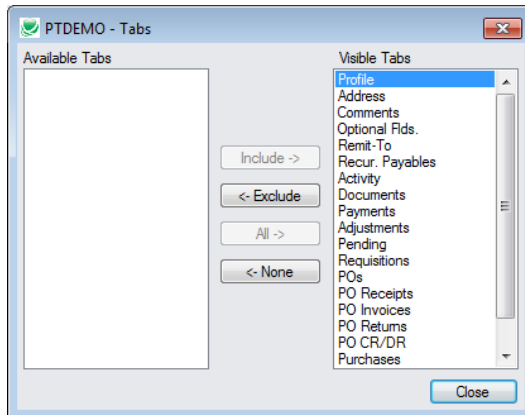
Control which tabs appear

You can control which tabs appear on the Vendor Inquiry screen.

- Click on **Settings > Tabs**.



- Select tabs using the following form. The example below shows that all tabs will be displayed.



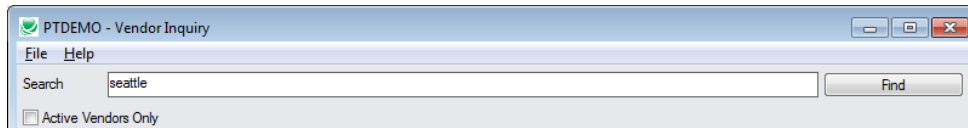
Look up Vendors with the SmartFinder

Click the Vendor No. button at the top of the form to open the SmartFinder for searching vendors.



Search:

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



- 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:

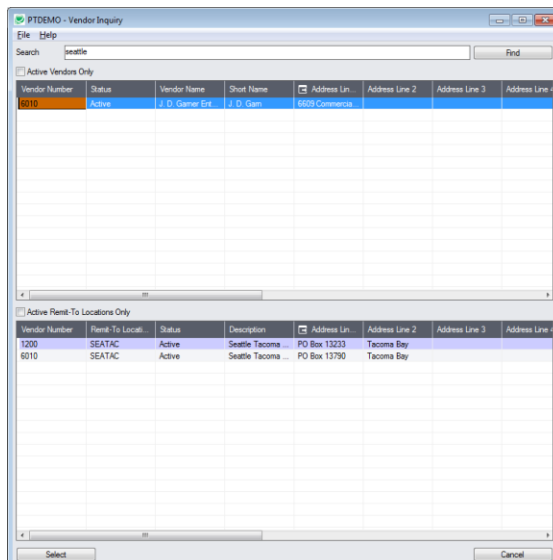
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for “Ross Blvd”, you will not see a vendor where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

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.



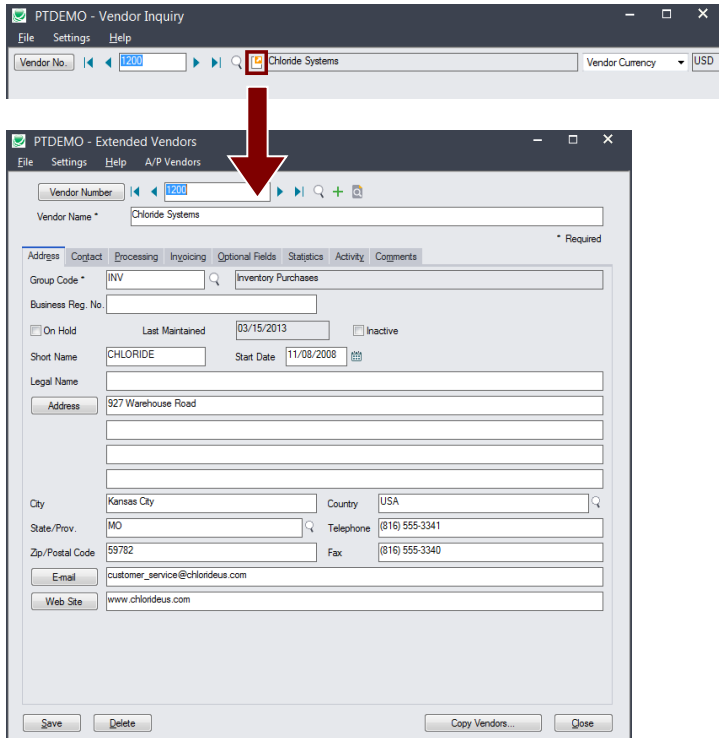
Selection:

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

Drill down to Extended Vendors screen

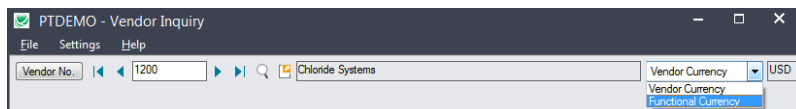
The Drill Down button beside the Vendor Name field displays the TaiRox Productivity Tools Extended Vendors screen (or the Sage 300 Vendors screen if the TaiRox program is not enabled), allowing you to edit the vendor information – or copy the vendor to other Sage 300 databases.

You can also look up and edit the details for other vendors while you are on this screen.



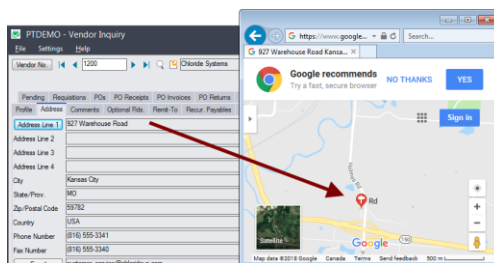
Choose the Vendor currency

- For multicurrency systems, choose whether to view figures in the vendor currency or in your functional currency.



Look up addresses in Google maps

- Click the Address button on the Vendor Inquiry screen's Address tab to confirm locations.

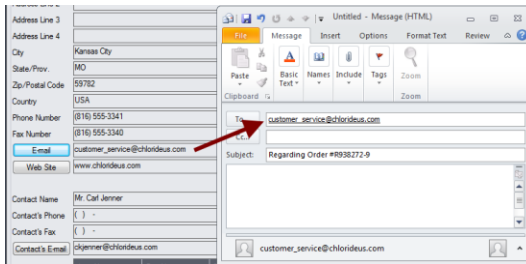


- Click the Address column headings for Remit-to address column headings to confirm the location of the selected remit-to address.

Remit-To ...	Description	Status	Date Last Mai...	Optional Fields	Address Line 1	Address Line 2
KML	Kamloops Credit...	Active	8/18/2010	Yes	15077 University Avenue	
VAN	First National Ba...	Active	8/18/2010	Yes	325 Sasmat Street	

Launch emails for vendors and vendor contact email addresses

- Click the E-mail or Contact's E-mail button on the Address tab to quickly create a new email.

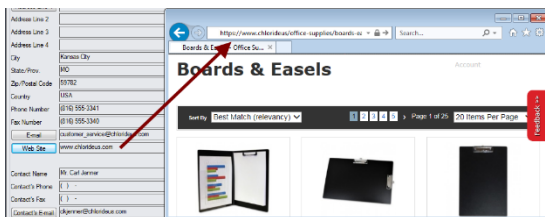


- You can also click the Email column heading to create an email for the selected additional contact.

Contact's Email	Office	Phone (Other)	Email	Notes	Inactive	Date Inactive	Date L
ckjenner@chlondous.com		5-1871	ckamenjenner10... does not use	Get approval f o... @RealBamyWhite	No		3/15/2

Look up Web sites in your browser

- Click the Web Site button on the Vendor Inquiry Address tab to look up Web sites.



Vendor Inquiry tabs – examples

Profile tab

PTDEMO - Vendor Inquiry

Vendor No. 1200 Chlorde Systems Vendor Currency USD

Pending Requisitions POs PO Receipts PO Invoices PO Returns PO CR/DR Purchases Aging Items

Profile Address Comments Optional Pids Remit-To Recur. Payables Activity Documents Payments Adjustments

Short Name CHLORIDE Start Date 11/08/2008
 Legal Name Last Maintained 03/15/2013
 Group Code INV Inventory Purchases Active
 Account Set USA Accounts payable, Other On Hold
 Rate Type SP
 Bank Code SEATAC Seattle Tacoma Bank
 Payment Code CHECKUSD USD check Seattle Tacoma Bank
 Check Language
 Delivery Method Mail
 Terms DUETBL Due by Invoice Date
 Retainage Terms
 Retainage % 0.00000
 Retention Period 0
 Tax Group USDTAX US Sales Tax - Purchase

Tax Authority	Authority Descri...	Tax Class	Class Description	Registration Number	Tax Included
STATE	State Tax	1	Taxable item		No
COUNTY	County Tax	1	Taxable merchandise		No

Vendor Account Status

Outstanding Balance	8,191.11	No. of Open Invoices	11
Prepayment Amount	-550.75	No. of Prepayments	4
Outstanding Retainage	0.00		
Credit Limit	5,000.00		

Refresh Close

Address tab

PTDEMO - Vendor Inquiry

Vendor No. 1200 Chlorde Systems Vendor Currency USD

Pending Requisitions POs PO Receipts PO Invoices PO Returns PO CR/DR Purchases Aging Items

Profile Address Comments Optional Pids Remit-To Recur. Payables Activity Documents Payments Adjustments

Address Line 1 927 Warehouse Road
 Address Line 2
 Address Line 3
 Address Line 4
 City Kansas City
 State/Prov. MO
 Zip/Postal Code 59782
 Country USA
 Phone Number (816) 555-3341
 Fax Number (816) 555-3340
 E-mail customer_service@chlorideus.com
 Web Site www.chlorideus.com

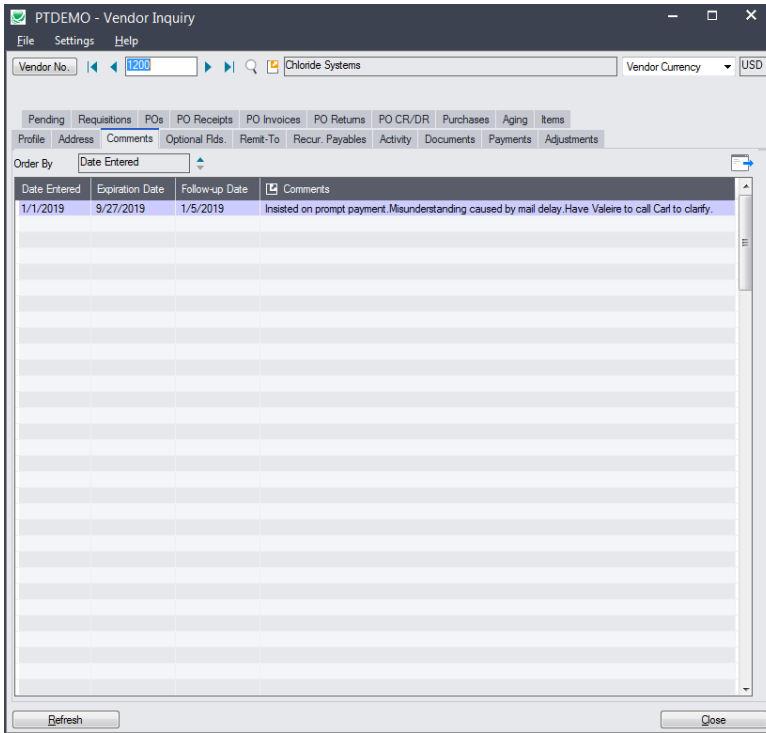
Contact Name Mr. Carl Jenner
 Contact's Phone () -
 Contact's Fax () -
 Contact's E-mail cjjenner@chlorideus.com

Office	Phone (Other)	Email	Notes	Inactive	Date Inactive	Date L
51871		camerjenner10...	Get approval if o...	No		3/15/2
		does not use	@RealBarryWhite	No		3/15/2

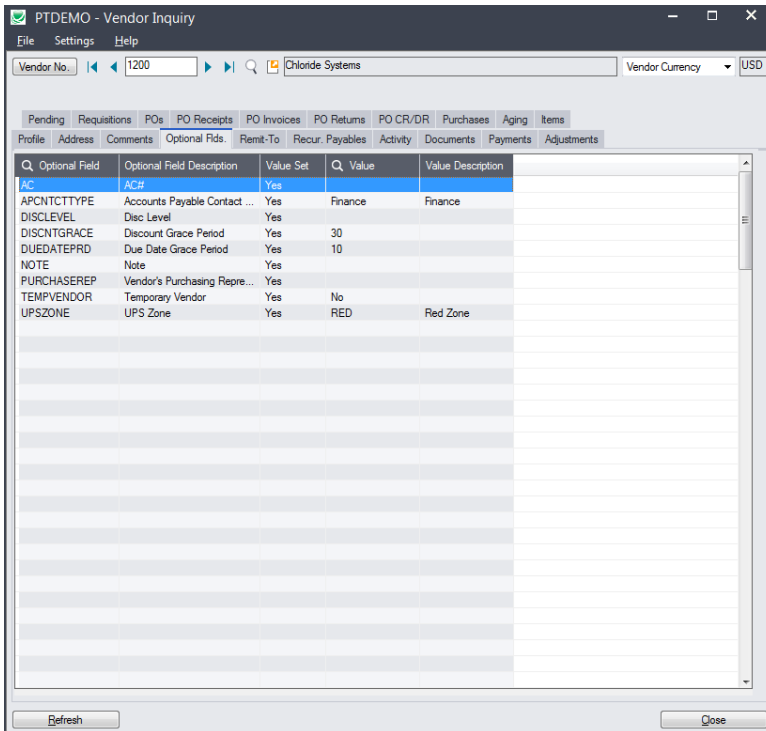
Refresh Close

- Click the Address button or Address headings to launch Google Maps. Click email buttons or column headings to launch an email client. Click the Web Site button to launch a browser.

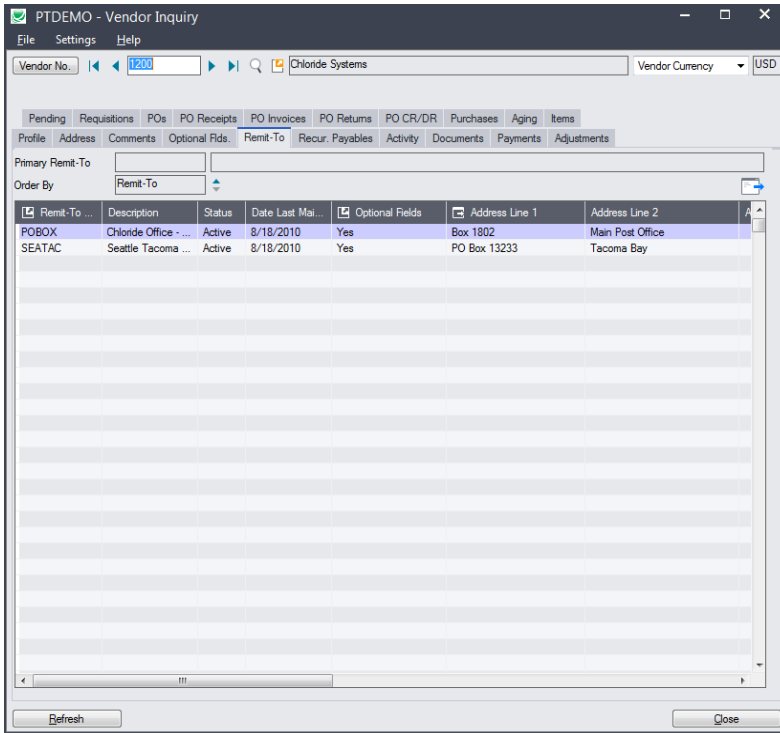
Comments tab



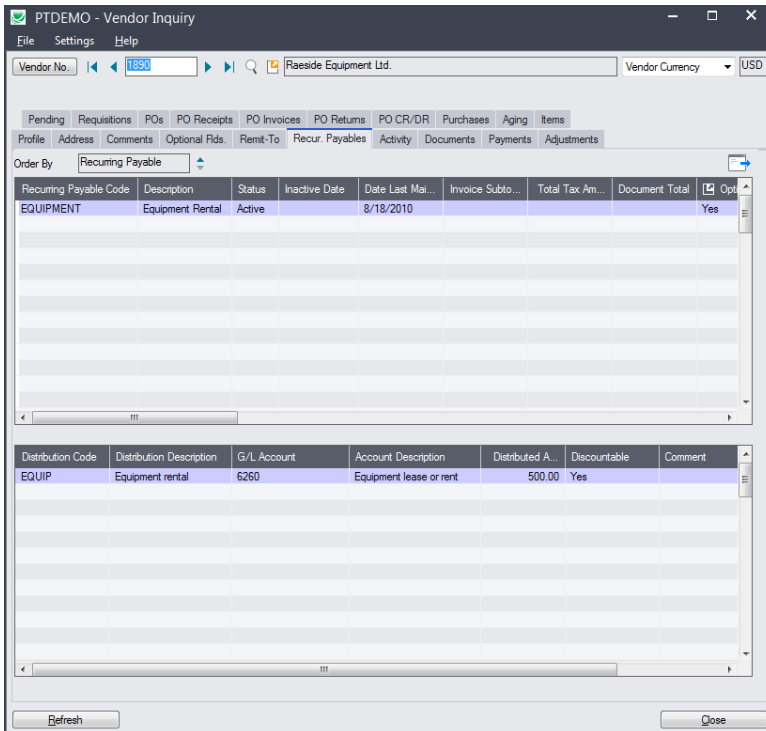
Optional Fields



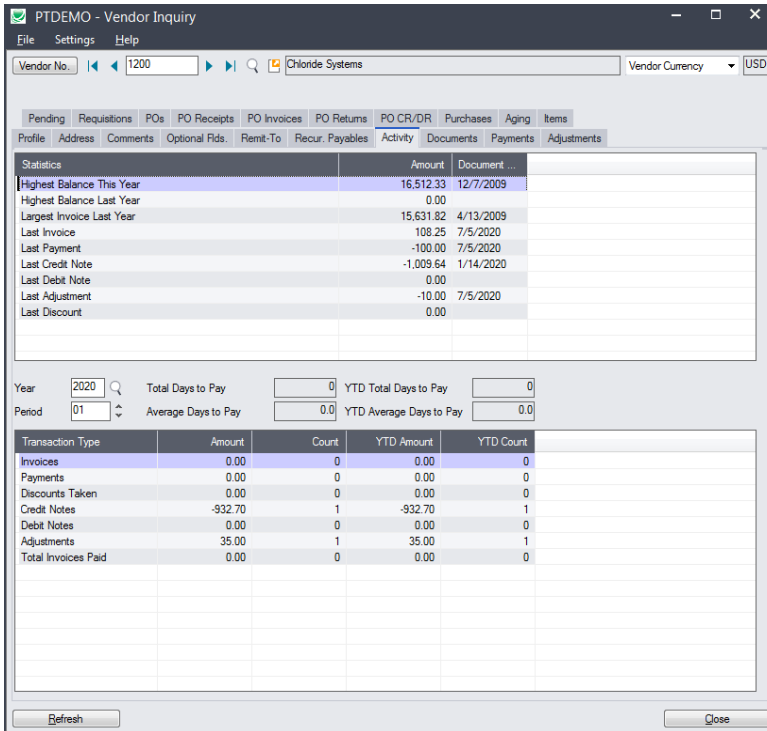
Remit-To tab



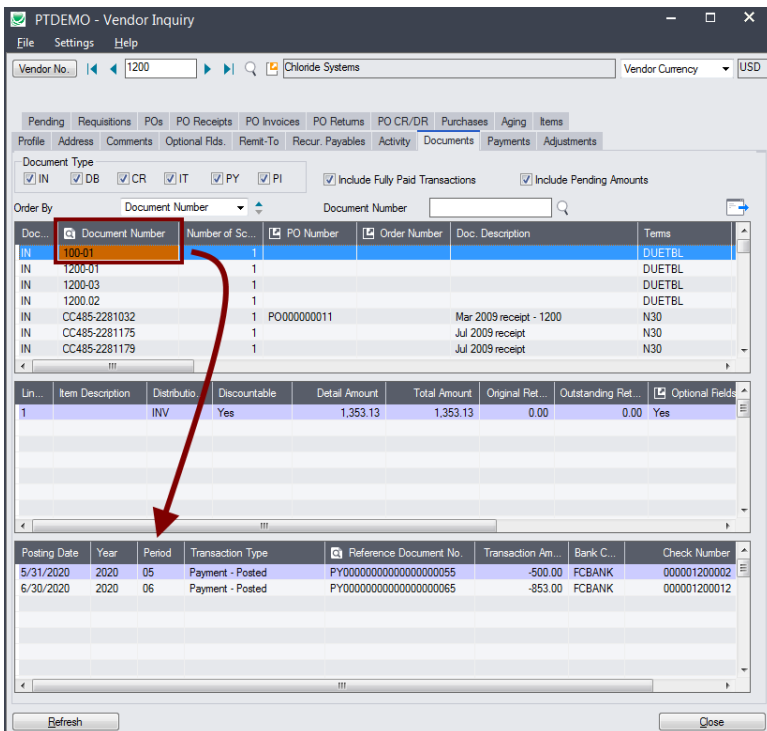
Recurring Payables tab



Activity tab

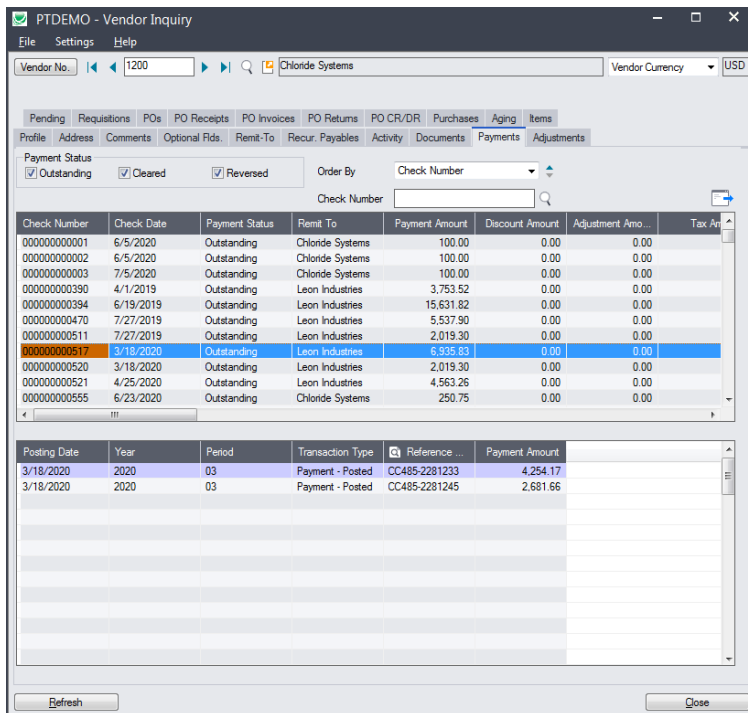


Documents tab



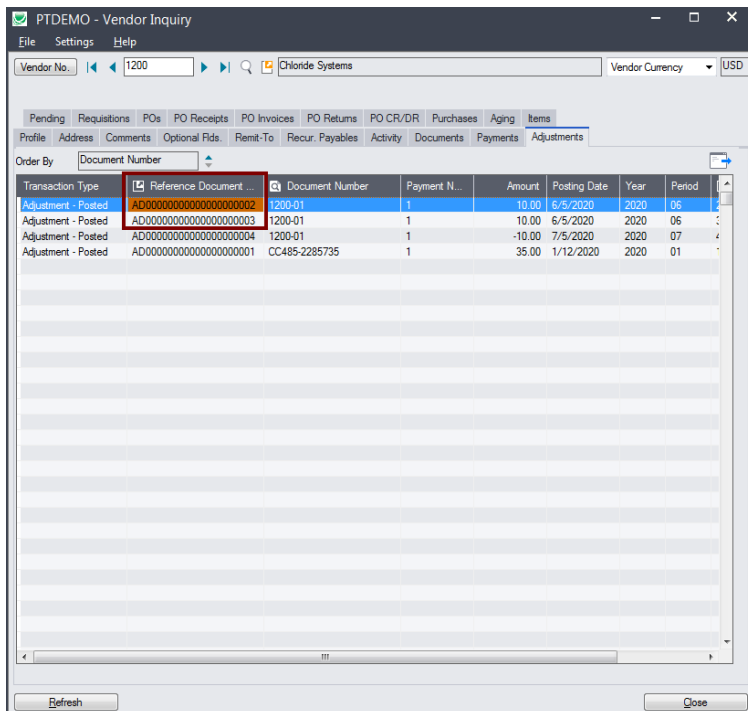
- Click the Document Number column heading to launch the Vendor Document Inquiry function for the selected document.
- The middle and bottom grids show the details for the document selected in the top grid.

Payments tab



- The bottom grid shows the details for the check selected in the top grid.

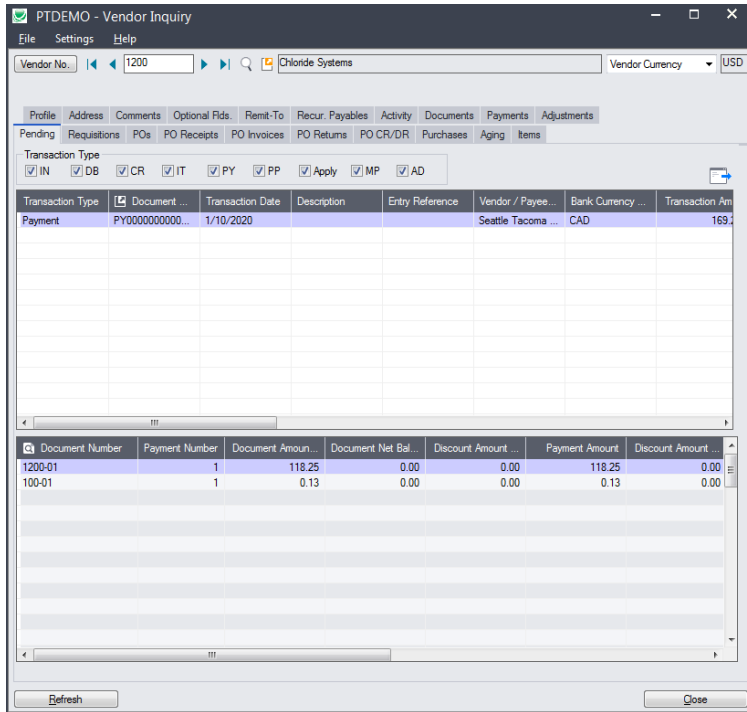
Adjustments



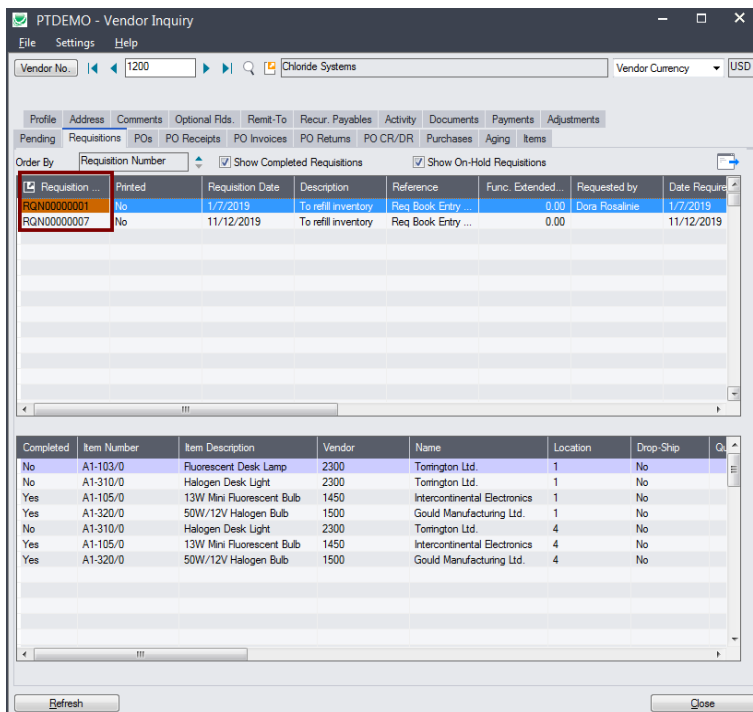
- Click the Reference Document column heading to display the adjustment.
- Click Document Number column to display the original document that was adjusted.

Pending tab

Pending documents are ones that haven't been posted yet.

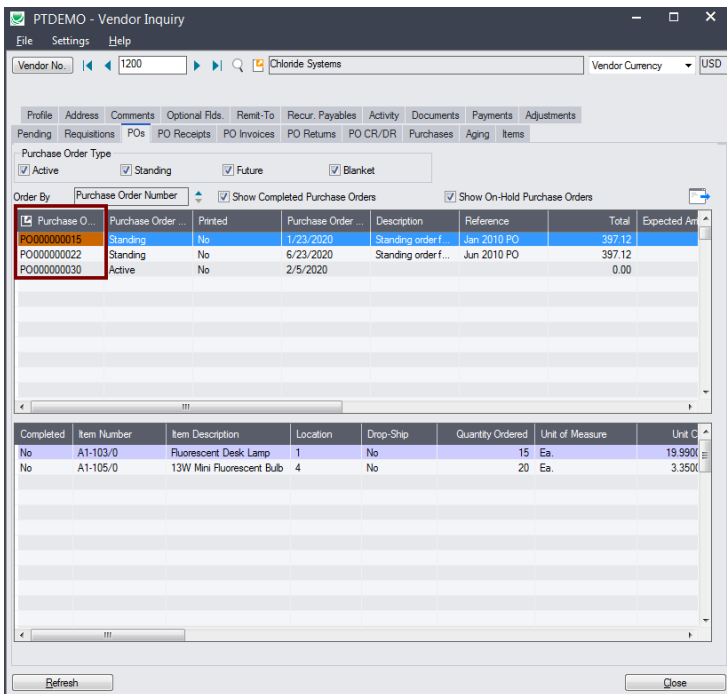


Requisitions tab



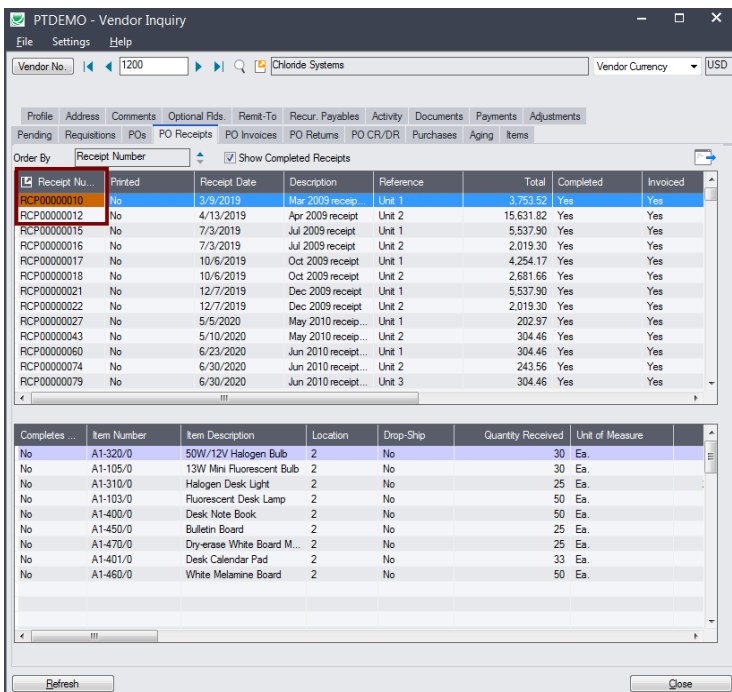
- Click the Requisition column heading to display the selected requisition.
- The bottom grid shows the details for the requisition selected in the top grid.

POs tab



- Click the Purchase Order column heading to display the selected PO.
- The bottom grid shows the details for the PO selected in the top grid.

PO Receipts tab



- Click the Receipt Number column heading to display the selected receipt.
- The bottom grid shows the details for the receipt selected in the top grid.

PO Invoices tab

Invoice No.	Invoice Date	Description	Reference	Total	Receipt No.	Receipt Date	Purchase O.
1200-01	5/5/2020			21,680	RCP0000086	5/5/2020	No
CC485-2281175	7/3/2019	Mar 2009 receipt	Unit 1	3,131,938	RCP0000019	7/3/2019	No
CC485-2281175	7/3/2019	Jul 2009 receipt	Unit 1	5,537,900	RCP0000015	7/3/2019	No
CC485-2281179	7/3/2019	Jul 2009 receipt	Unit 2	2,019,300	RCP0000016	7/3/2019	No
CC485-2281233	10/6/2019	Oct 2009 receipt	Unit 1	4,254,170	RCP0000017	10/6/2019	No
CC485-2281245	10/6/2019	Oct 2009 receipt	Unit 2	2,681,560	RCP0000018	10/6/2019	No
CC485-2285330	12/7/2019	Dec 2009 receipt	Unit 2	2,019,300	RCP0000022	12/7/2019	No
CC485-2285735	12/7/2019	Dec 2009 receipt	Unit 1	5,537,900	RCP0000021	12/7/2019	No
CC485-2287453	4/13/2019	Apr 2009 receipt	Unit 2	15,631,820	RCP0000012	4/13/2019	No
IN120111	5/5/2020	May 2010 receipt...	Unit 1	202,970	RCP0000027	5/5/2020	No
IN120121	5/10/2020	May 2010 receipt...	Unit 2	304,460	RCP0000043	5/10/2020	No
IN120131	6/23/2020	Jun 2010 receipt...	Unit 1	304,460	RCP0000050	6/23/2020	No
IN120141	6/30/2020	Jun 2010 receipt...	Unit 2	243,560	RCP0000074	6/30/2020	No

Fully Invoiced	Item Number	Item Description	Location	Quantity Received	Unit of Measure	Unit Cost
Yes	A1-320/0	50W/12V Halogen Bulb	2	30	EA	3,390.00
Yes	A1-105/0	13W Mini Fluorescent Bulb	2	30	EA	3,350.00
Yes	A1-310/0	Halogen Desk Light	2	25	EA	23,500.00
Yes	A1-103/0	Fluorescent Desk Lamp	2	50	EA	19,990.00
Yes	A1-400/0	Desk Note Book	2	50	EA	7,250.00
Yes	A1-450/0	Bulletin Board	2	25	EA	7,250.00
Yes	A1-470/0	Dry-erase White Board Markers	2	25	EA	5,150.00
Yes	A1-401/0	Desk Calendar Pad	2	33	EA	5,750.00
Yes	A1-460/0	White Melamine Board	2	50	EA	16,320.00

- Click the Invoice Number column heading to display the selected invoice.
- Click the Receipt Number column heading to display the selected receipt.
- Click the Purchase Order Number column heading to display the selected PO.
- The bottom grid shows the details for the invoice selected in the top grid.

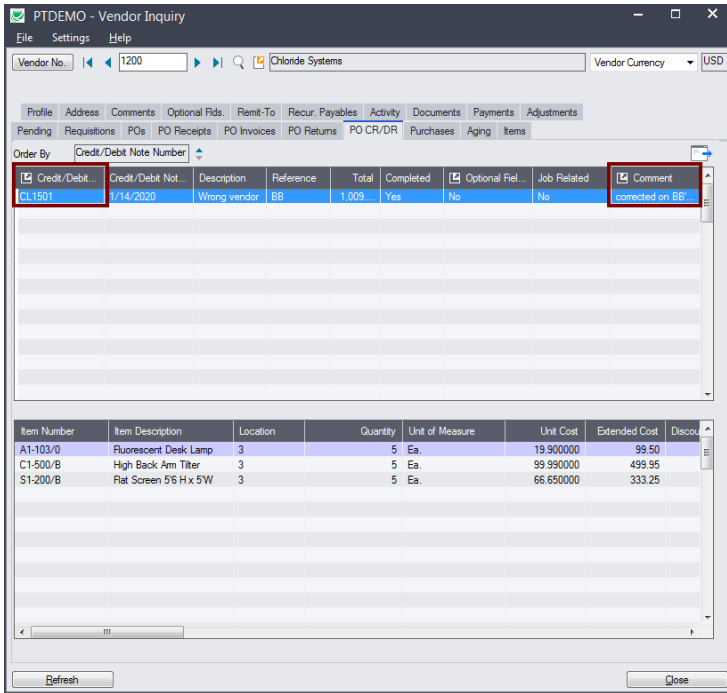
PO Returns tab

Return Number	Return Date	Description	Ref.	Total	Comple.	Is Credited	Option	Comment	Purch.	Receipt
RET00000001	1/14/2020	Duplicate	BB	1,009,640	No	No	No	returned on		RCP0000000

Item Number	Item Description	Location	Quantity Received	Extended Cost	Discount Received	Quantity Returned
A1-103/0	Fluorescent Desk Lamp	3	10	199.00	0.00	
C1-500/0	High Back Arm Tilter	3	10	999.90	0.00	
S1-200/0	Flat Screen 56 Hx 5W	3	10	666.90	0.00	

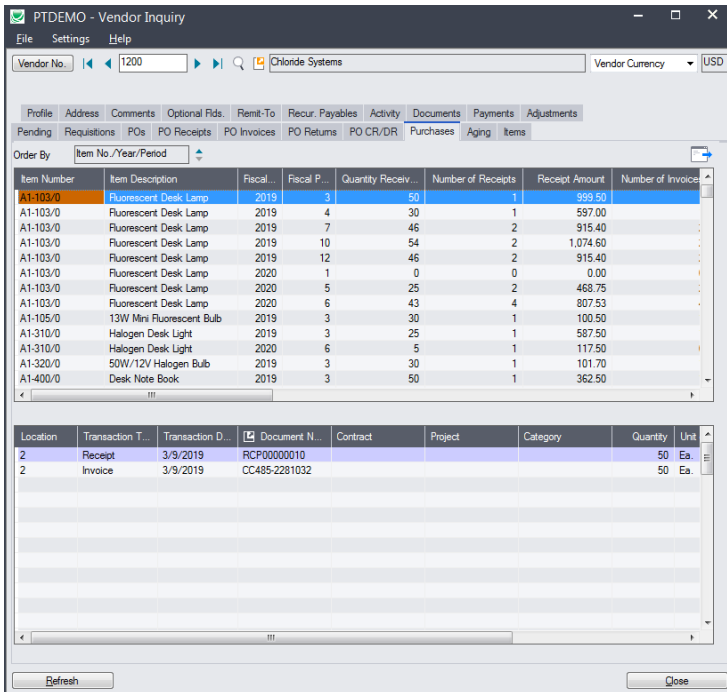
- Click the Comment column heading to display a pop-up with the return comments.
- Click the Purchase Order Number column heading to display the selected PO.
- Click the Receipt Number column heading to display the selected receipt.
- The bottom grid shows the details for the return selected in the top grid.

PO CR/DR tab



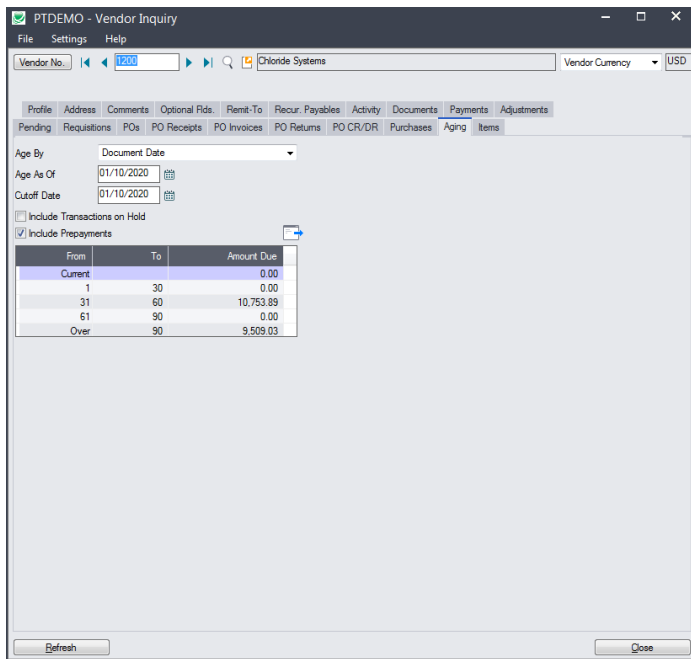
- Click the Credit/Debit Note column heading to display the selected CR/DR.
- Click the Comment column heading to display a pop-up with the CR/DR comments.
- The bottom grid shows the details for the CR/DR selected in the top grid.

Purchases tab



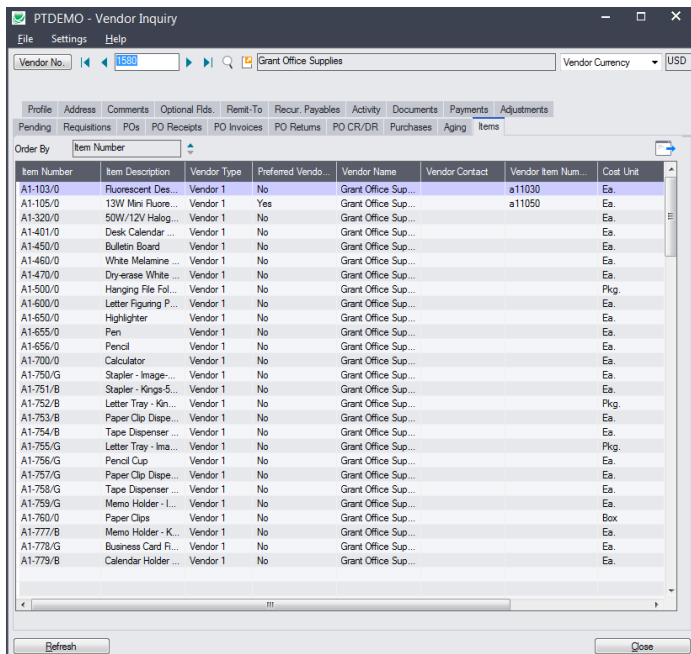
- The bottom grid shows the details for the CR/DR selected in the top grid.

Aging tab



- Choose Age By Due Date or Document Date from the dropdown.
- Enter an Age As Of Date and a Cutoff Date.
- Include/exclude Transaction on Hold or Prepayments.

Items tab



- Lists items provided by vendor, along with item information such as the vendor item number, unit cost and order minimum.
- Lists items in ascending or descending order by item number.