

Extended PO Entry

Extended PO Entry is an enhanced replacement for the Sage Purchase Orders Entry form. It provides you with more information while entering a PO and fast access to additional PO, Vendor, and Item information.

The following pictures show some of the extra features on the Extended PO Entry screen:

Sage Purchase Order Entry screen

TaiRox Extended PO Entry screen

Click the following links for details on each Extended PO Entry feature:

[SmartFinder – Purchase Orders](#) Finds purchase orders and shows PO details quickly for any vendor.

[SmartFinder – Vendors](#) Find a vendor quickly from a name, description, phone number or an address.

[SmartFinder – Items](#) Find an item quickly from partial words.

SmartFinders provide fast, browser-like search capabilities to lookups on the PO Entry screen.

The SmartFinder searches more fields than the Finder and searches in all text fields at once.

For example, search for “Seattle” if you think that the vendor or contact is in Seattle.

[Vendor Inquiry](#) (button left of the vendor name field) provides complete vendor data, including POs, receipts, purchases, requisitions, invoices, payments, adjustments, etc.

[Vendor Optional Fields](#) Display any vendor optional fields on the Extended PO Entry screen.

[Quantities Display](#) Show item quantities at the bottom of the standard PO entry window - the same item quantities that are displayed in the Sage 300 Order Entry module.

[Item Quantities](#) Display quantities available at other locations or in other companies while entering a purchase order.

[Drop Ship](#) Drop ship dozens of purchase order detail lines in a single operation.

[Line Finder](#) Quickly find a detail line in a large order by item number, location, order number, or vendor item number.

[Purchase from History](#) Create a new purchase orders for a vendor based on what has been previously purchased from that vendor.

[Quick PJC Entry](#) Default newly inserted lines to have the same Contract, Project and Category selections as the previously entered line.

SmartFinder – Purchase Orders

Click the PO Number button to open the SmartFinder for searching purchase orders.

PO Number

Search:

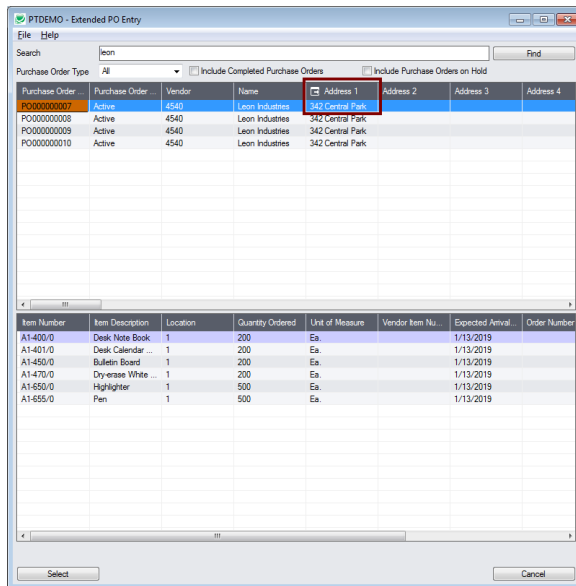
- Enter one or more words or word fragments in the entry field to search multiple tables and fields.
- You can filter by purchase order type and include completed and on-hold purchase orders.
- Search returns records which contain the search string in any of the searched fields – for example, one record may have “Royal” in the name, where another may have it in the address field. Both 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 PO 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 POs matching the search criteria. Double-click to select a PO.
- The bottom grid displays the details of the purchase order highlighted in the top grid.
- 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.



SmartFinder – Vendors

Click the Vendor Number button to open the SmartFinder for searching vendors.

Vendor Number

Search:

- Enter one or more words or word fragments in the 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:

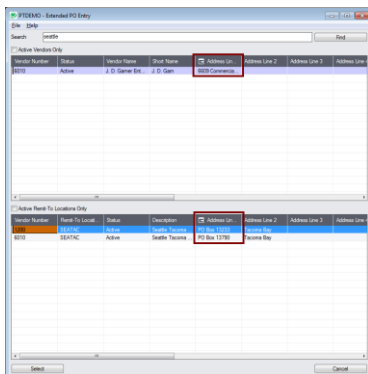
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for “Ross Blvd”, you will not see a vendor where “Ross” is in the Vendor Name field and “Blvd” is in the Address 1 field.)
- Addresses (e.g. the vendor address) are treated as a single field.

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:

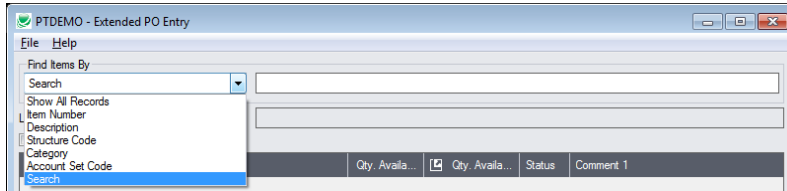
- Double-click a vendor in the top grid to select and enter the vendor on the purchase order.
- Double-click a remit-to location in the bottom grid to add the vendor and this remit-to address to the purchase order.

SmartFinder – Items

Click the Item Finder button under the item grid to open the SmartFinder for items.

Item Finder...

The Item Finder provides 7 search options:



- **Search** (most common and option) – to search for words or word fragments in item text fields (item number, item description, structure code, category, price list, picking sequence, and comments). This search works like the PO Number and Vendor Number SmartFinders.
- **Show All Records** – to select items from all item records based on ranges of Item Number, Structure Code, Category, and Account Set Code and on item Status. You can also specify additional selection criteria using more item fields.
- **Item Number** – to select items using part of the item number. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Description** – to select items that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Structure Code** – to select items with structure codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Category** – to select items in categories that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.
- **Account Set Code** – to select items with codes that begin with or contain a string of characters. You can refine your selection based on ranges of Item Number, Structure Code, Category, and Account Set Code, select items by item status, and specify additional selection criteria using more item fields.

The Search option (most common option):

- Select Find Items by Search. (Note that the search option defaults to the last choice used.)
- Enter one or more words or word fragments in the next field to search multiple tables and fields.
- You can filter for Active items only.
- Search returns items and vendor item numbers that contain the search string in any of the searched fields – for example, one record may have “Desk” in the Description field, where another may have it in the Comment 1 field. Both items 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".

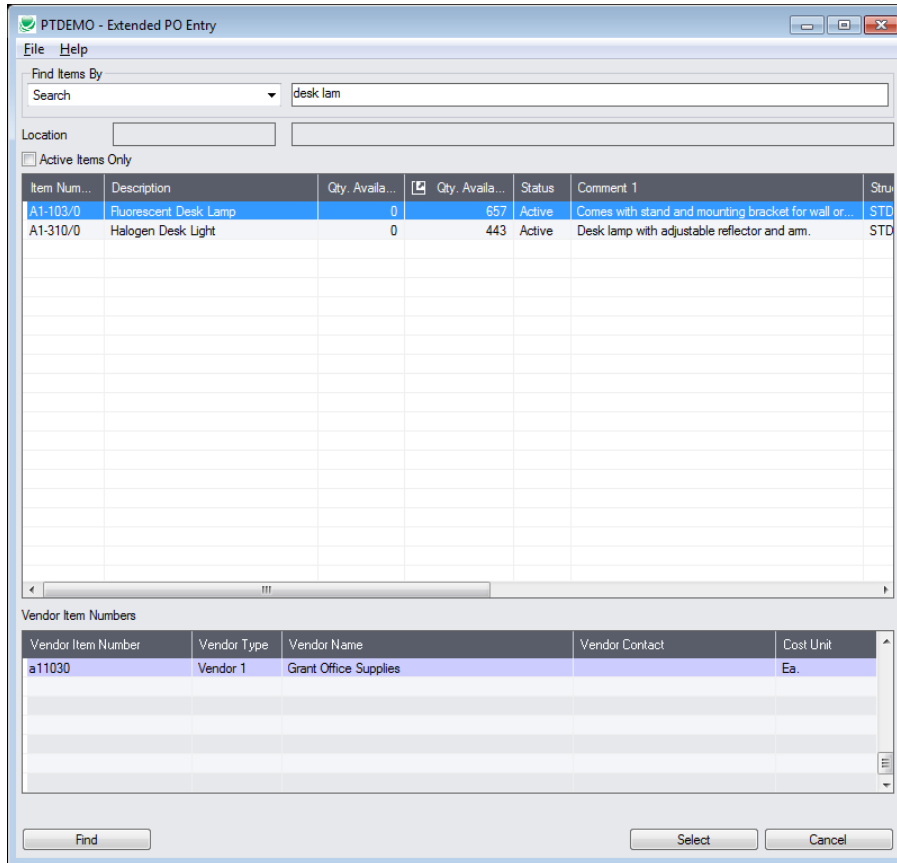
Note:

- If using the Search option, all of the word fragments must be present in one of the fields being searched. (For example, if you searched for “desk lamp”, you will not see an item where only “desk” is in the Description field and only “lamp” is in the Comment 1 field.)

The screen below shows “Desk Lamp” in the description of one item, and “Desk Lamp” in the comments of the second one – so both appeared.

Display:

- The top grid displays the items matching the search criteria.
- The bottom grid displays the vendor item numbers for the item selected in the top grid.



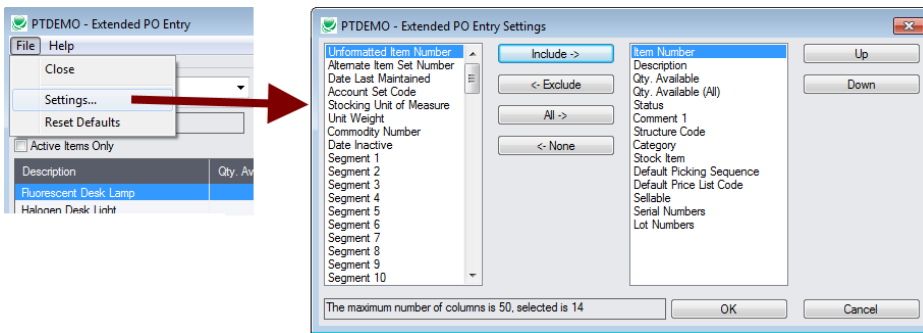
- Click the Qty. Available column to see the location details, with the quantities on hand, on purchase orders and on sales orders. You can drill down further on these quantities.

Selection:

- Double-click an item in the top grid to select and enter the vendor on the purchase order.
- Double-click a vendor item number to enter the item number and the vendor item number into the PO form.

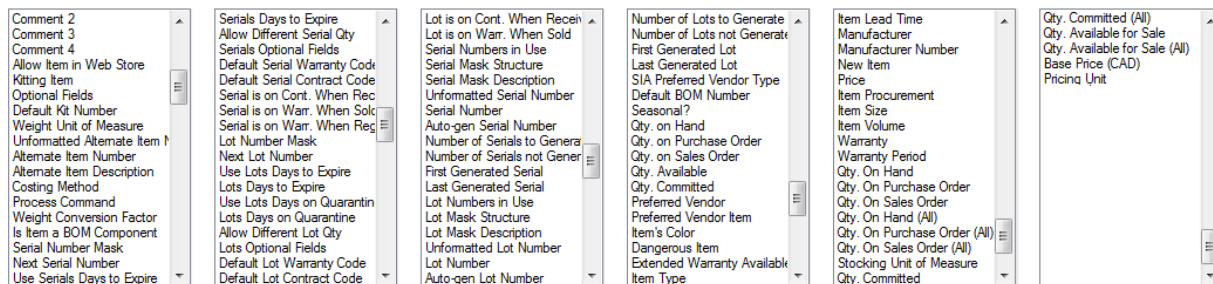
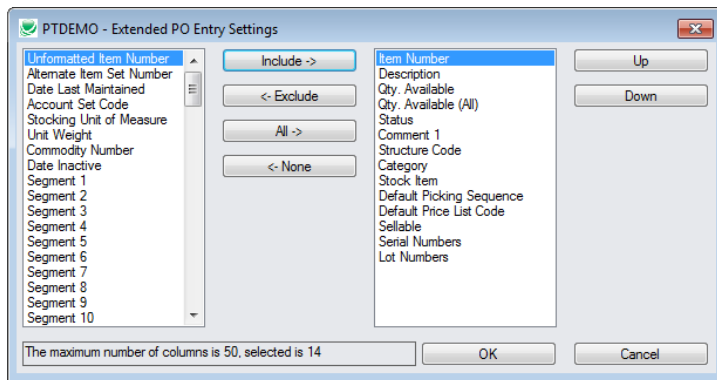
Selecting columns to display in the Item Finder

Choose **File > Settings** in the Item Finder window to change column settings.



- The current columns that are displayed appear in the right-hand column.
- Highlight columns that you want to add in the left-hand column and click the Include button.

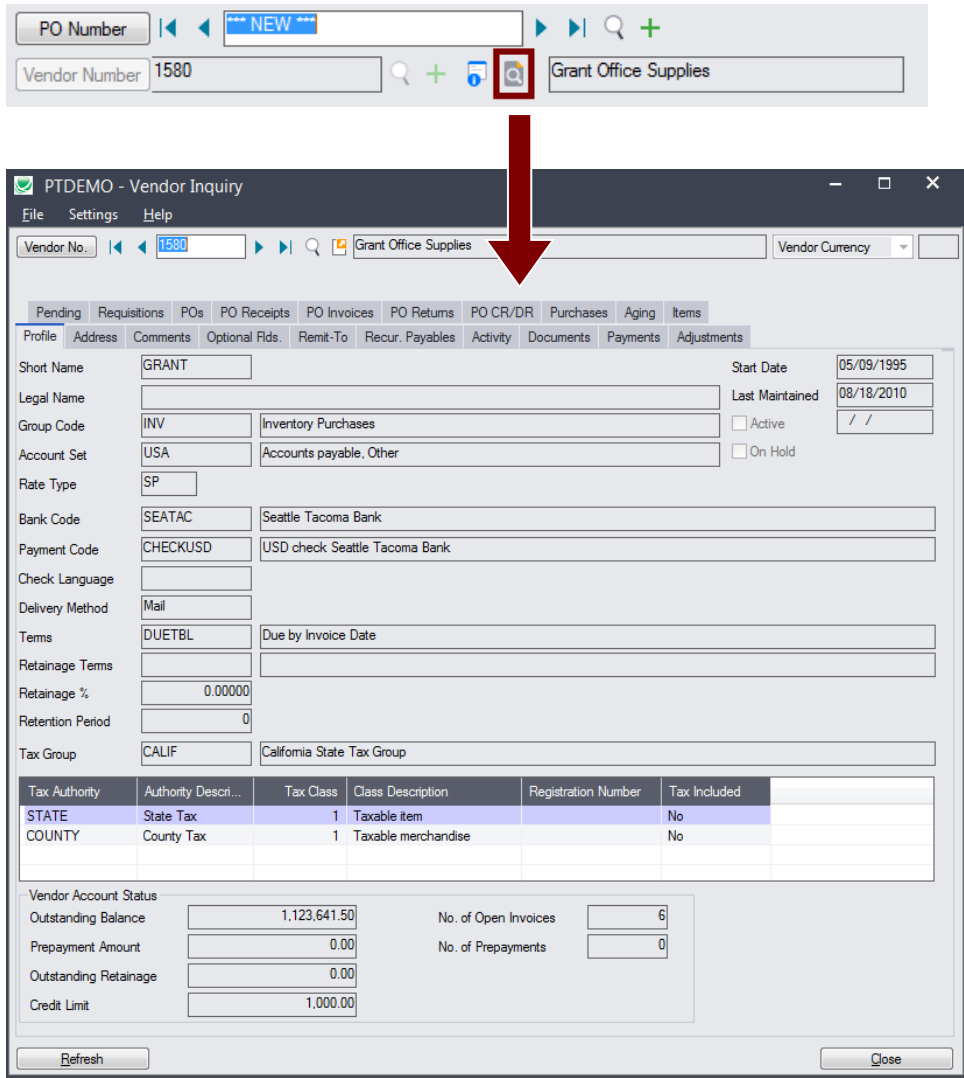
All of the possible columns are shown below. Note that optional and calculated fields are also available for inclusion – for example Item’s Color and Qty. Available for Sale.



Vendor Inquiry

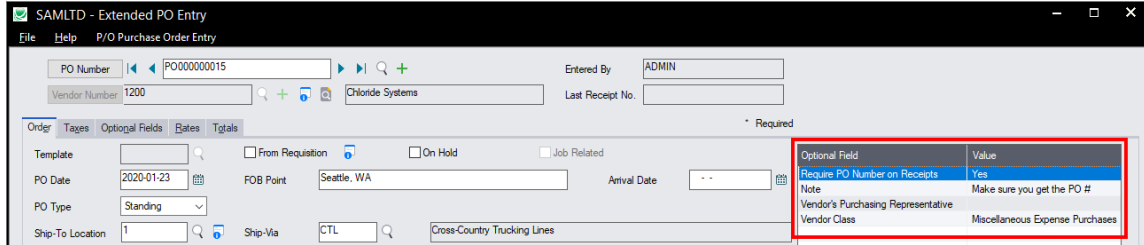
Vendor Inquiry button displays the TaiRox Productivity Tools Vendor Inquiry screen – a convenient way to view data related to the vendor. Each tab focuses on an aspect of the vendor’s data.

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



Vendor Optional Fields

If you use the Sage 300 Optional Fields module, you can display any optional fields from the A/P vendor record on the right side of the Extended PO Entry screen.



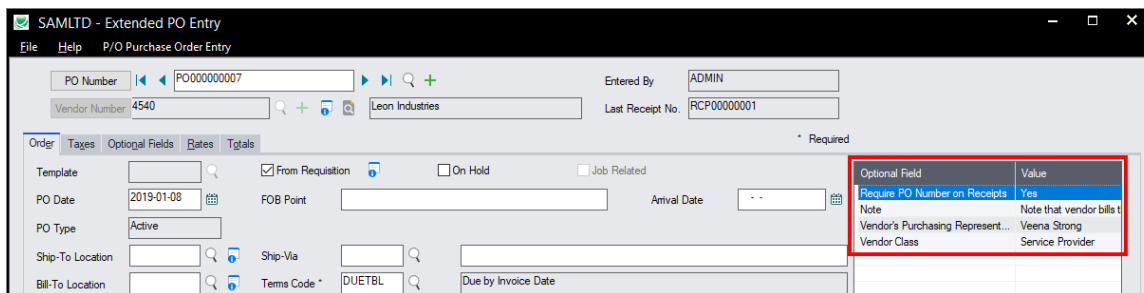
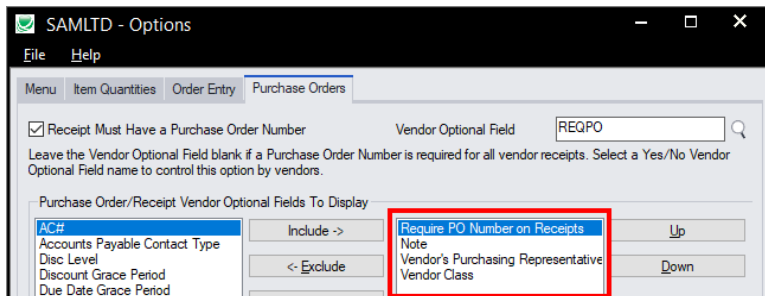
This lets you view notes concerning the account during data entry, and also view PO requirements.

You specify which optional fields to display on the Extended PO Entry screen using the Productivity Tools Options program.

Setting Up Optional Fields on the Extended PO Entry Screen

You choose the vendor optional fields to display on the Extended PO Entry screen and Extended PO Receipt Entry screen using the Productivity Tools Options program on the Sage 300 Desktop.

The following example shows the vendor optional fields that will appear on the Extended PO Entry screen.



Quantities Displayed on the Extended PO Entry screen

Extended PO Entry displays item quantities for the selected location and item at the bottom of the PO Entry window – like the quantities displayed on the Sage Order Entry screen.

The program also provides drill-down links for quantities on sales order, quantities on purchase order, and committed quantities.

Note that the screen below shows the single location displayed for the current line item in the grid, as well as a total for all locations.

You can change the display to include item quantities for multiple locations in multiple companies.

The screenshot displays the 'SAMLTD - Extended PO Entry' window. The PO Number is PO000000015, entered by ADMIN. The Vendor is Chloride Systems. The PO Date is 2020-01-23, and the FOB Point is Seattle, WA. The PO Type is Standing. The grid shows two line items:

| Lin... | Completed | Q | Item Number | Item Description | Q | Location | Drop-Ship | Quantity Ordered | Q | Unit of Measure | Q | Unit Cost | Extended Cost | Discount % | Discount Amount |
|--------|-----------|---|-------------|---------------------------|---|----------|-----------|------------------|---|-----------------|---|-----------|---------------|------------|-----------------|
| 1 | No | | A1-103/0 | Fluorescent Desk Lamp | 1 | | No | 15 | | Ea. | | 19.990000 | 299.85 | 0.00000 | 0.00 |
| 2 | No | | A1-105/0 | 13W Mini Fluorescent Bulb | 4 | | No | 20 | | Ea. | | 3.350000 | 67.00 | 0.00000 | 0.00 |

At the bottom of the window, a summary table is highlighted with a red border:

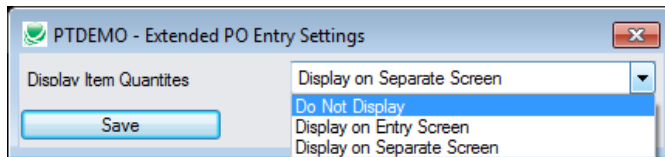
| | Qty. On Hand | Qty. On Sales Order | Qty. On Purchase Order | Qty. Committed | Qty. Available |
|---------------------|--------------|---------------------|------------------------|----------------|----------------|
| Location 1 (Ea.) | 137 | 15 | 250 | 0 | 137 |
| All Locations (Ea.) | 657 | 84 | 426 | 0 | 657 |

Displaying Quantities for multiple locations and companies

Extended PO Entry can also display item quantities available at other locations – either at the bottom of the Extended PO Entry screen or in a separate window.

To display quantities for multiple locations and companies:

- Select the **Extended PO Entry > File > Settings** menu choice to change the Item Quantities display settings.



- **Do Not Display** – shows only total quantities and quantities for the current line item location.

| | Qty. On Hand | Qty. On Sales Order | Qty. On Purchase Order | Qty. Committed | Qty. Available |
|---------------------|--------------|---------------------|------------------------|----------------|----------------|
| Location 2 (Ea.) | 262 | 9 | 0 | 0 | 262 |
| All Locations (Ea.) | 657 | 23 | 276 | 0 | 657 |

- **Display on Entry Screen** – includes a new grid at the bottom of the screen that displays quantities at all locations, in the current company and any associated companies.

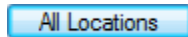
| | Qty. On Hand | Qty. On Sales Order | Qty. On Purchase Order | Qty. Committed | Qty. Available |
|---------------------|--------------|---------------------|------------------------|----------------|----------------|
| Location (Ea.) | 0 | 0 | 0 | 0 | 0 |
| All Locations (Ea.) | 657 | 23 | 276 | 0 | 657 |

| Database ID | Name | Location | Description | Item Number | Description | Stocking Unit | Qty. On Hand | Qty. On Purchase |
|-------------|------------------|----------|--------------------|-------------|--------------------|---------------|--------------|------------------|
| SAMINC | Sample Compan... | 1 | Central warehou... | A1-103/0 | Fluorescent Des... | Ea. | 137 | |
| SAMINC | Sample Compan... | 2 | Portland Office | A1-103/0 | Fluorescent Des... | Ea. | 262 | |

- **Display on Separate Screen** – displays the item quantities at all locations in a separate window. (The image below shows the window widened to display most of the quantity columns.)

| Database ID | Name | Location | Description | Item Number | Description | Stocking Unit | Qty. On Ha. | Qty. On Purc. | Qty. On Sales O. | Qty. Available | Qty. Committed | Qty. Available to | Qty. On Hand (All) | Qty. On Purcha | Qty. On Sales O. | Qty. Available (All) |
|-------------|------------------------|----------|--------------------|-------------|--------------------|---------------|-------------|---------------|------------------|----------------|----------------|-------------------|--------------------|----------------|------------------|----------------------|
| SAMINC | Sample Company Inc. | 1 | Central warehou... | A1-103/0 | Fluorescent Des... | Ea. | 137 | 310 | 1 | 137 | 0 | 136 | 657 | 486 | 32 | 657 |
| SAMINC | Sample Company Inc. | 2 | Portland Office | A1-103/0 | Fluorescent Des... | Ea. | 262 | 50 | 21 | 262 | 0 | 241 | 657 | 486 | 32 | 657 |
| SAMLTD | Sample Company Limited | 2 | Portland Office | A1-103/0 | Fluorescent Des... | Ea. | 262 | 50 | 9 | 262 | 0 | 253 | 657 | 426 | 34 | 657 |

Click the All Locations button to move the Quantities in front of other windows (if hidden).



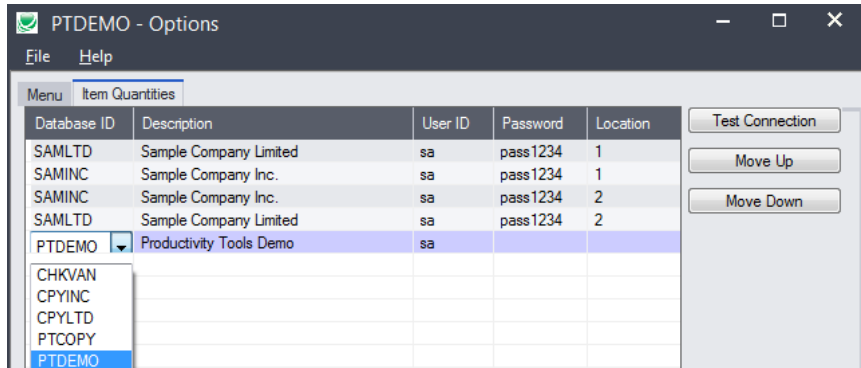
The All Locations button appears at the bottom of the Extended PO Entry screen if you choose to display quantities on a separate screen.

Item Quantities will be refreshed as you move to other detail lines.

Selecting which companies and locations are displayed

An administrator must first set up the Sage 300 company databases and locations that are displayed in the Item Quantities grid.

- Go to **TaiRox Productivity Tools > Options**, and click the Item Quantities tab.

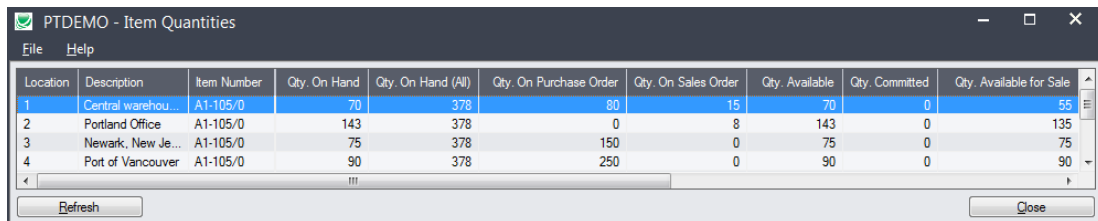


- Use the Insert and Delete keys to add or remove locations and companies from the Item Quantities grid and to change the order that locations appear.

Each user can customize the item quantities grid by hiding and moving columns to suit their own needs.


For example:

- You can hide the Database ID and Name columns if all locations are in the same Sage 300 company.
- You can also hide the Item Description and Stocking Unit if these are the same at all locations. Hide and re-arrange columns by dragging and dropping.

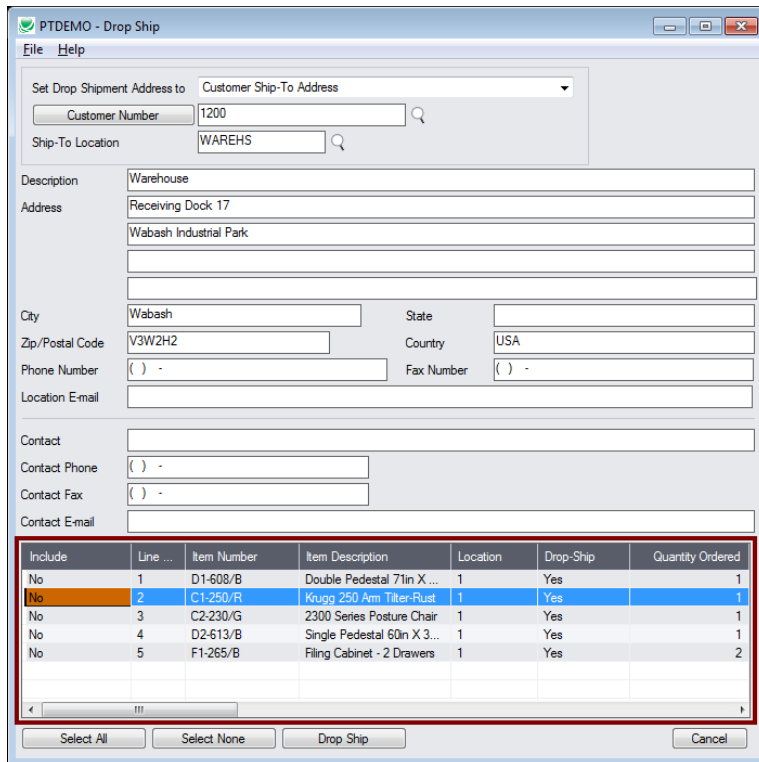


Using the Extended Drop Ship window

The Extended Entry Drop Ship window lets you drop ship multiple items at a time.

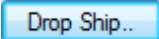
Click the Drop Ship button to display the Drop Ship pop up window. 

- The top portion of the form is the same as the standard Drop Ship form.
- The grid at the bottom displays the Purchase detail lines.



| Include | Line ... | Item Number | Item Description | Location | Drop-Ship | Quantity Ordered |
|---------|----------|-------------|-----------------------------|----------|-----------|------------------|
| No | 1 | D1-608/B | Double Pedestal 71in X... | 1 | Yes | 1 |
| No | 2 | C1-250/R | Krugg 250 Arm Tilter-Rust | 1 | Yes | 1 |
| No | 3 | C2-230/G | 2300 Series Posture Chair | 1 | Yes | 1 |
| No | 4 | D2-613/B | Single Pedestal 60in X 3... | 1 | Yes | 1 |
| No | 5 | F1-265/B | Filing Cabinet - 2 Drawers | 1 | Yes | 2 |

To drop ship items:

- Click the Drop Ship button to display the Drop Ship form. 

Choose the first drop ship address and items


- Pick a shipment address.
- Double-click the Include column (select "Yes") for each item that you want to drop ship to the selected address.
- Click the Drop Ship button on the form to update the PO entry window with the selected items.

Choose the second drop ship address and items

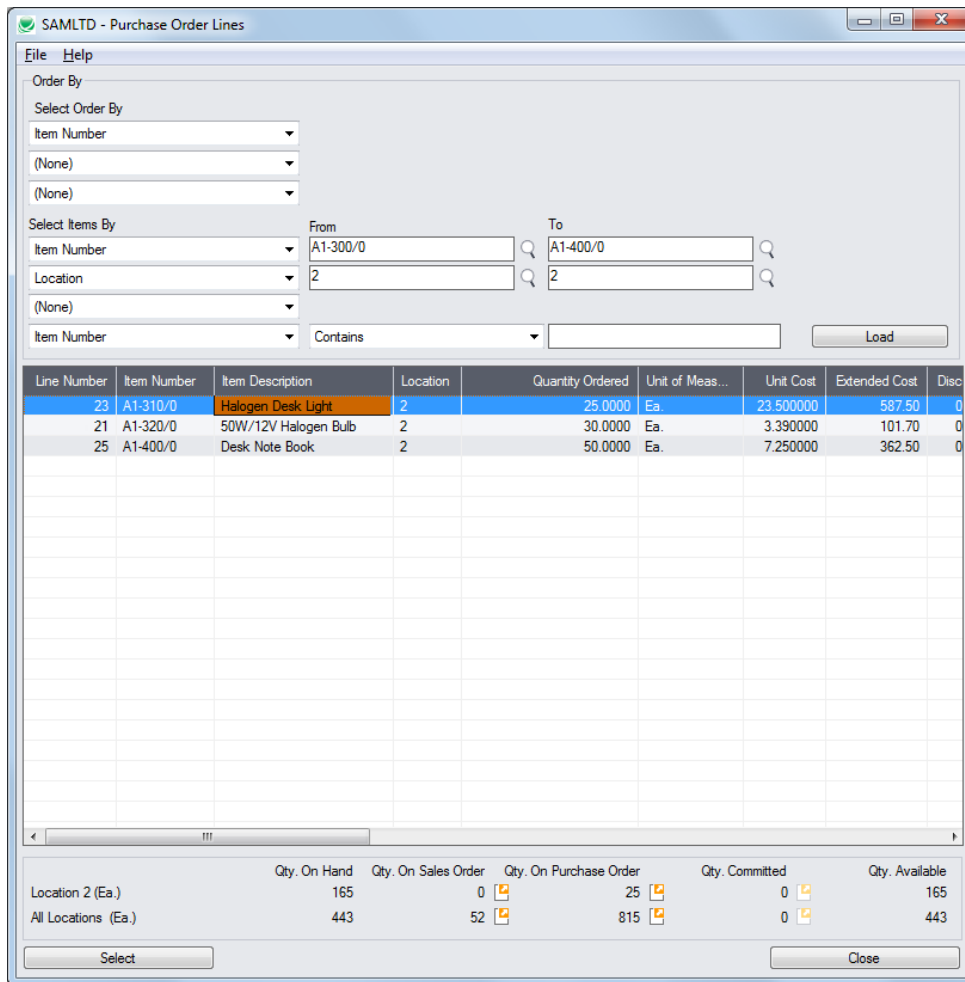
- Select another shipment address to drop ship other items on the PO to a different location.
- Double-click the Include column (select "Yes") for each item that you want to drop ship to the new address.
- Click the Drop Ship button on the form to update the PO entry window with the selected items.
- Press Cancel when done to return to the main PO entry window.

Using the Line Finder

The Extended PO Entry Line Finder window lets you quickly find any PO detail line in a large order by item number, location, order number, or vendor item number.

Click the Line Finder button to display the Line Finder pop up window. 

- Choose the order to display PO items in the Line Finder.
You can list items by item number, location, vendor item number, or order number. The example below displays lines by item number.
- Choose the selection criteria for displaying PO items in the Line Finder.
You can select items by item number, location, vendor item number, or order number. The example below selects item lines using a range of item numbers and the location.
- Click the Load button to display the selected lines.
- Double-click the line you want to view, or highlight the line and click the Select button at the bottom of the screen.

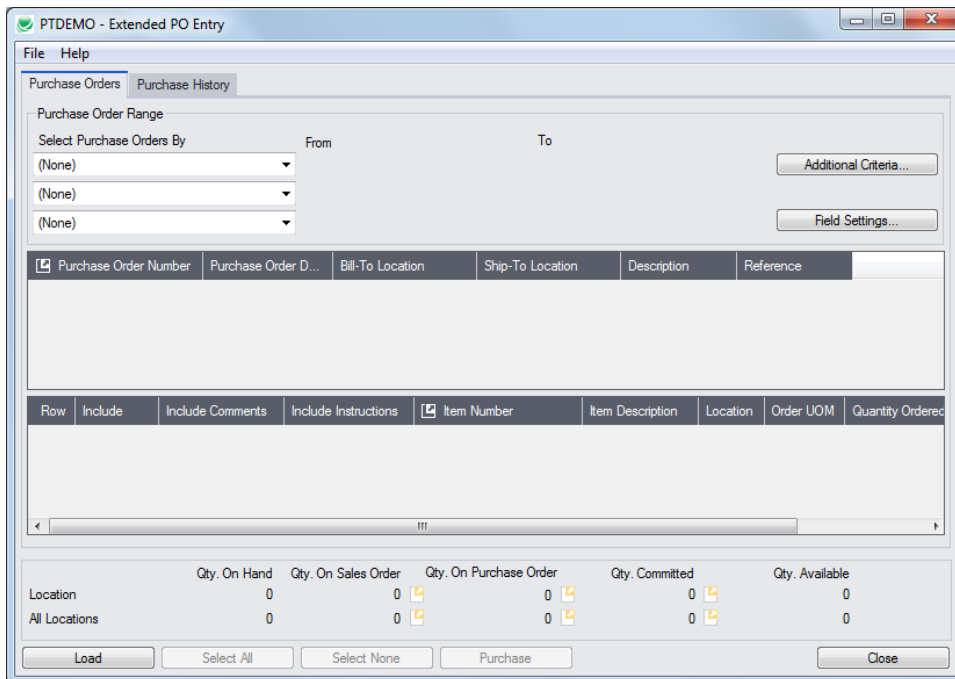


Purchasing from History

The Purchase from History window lets you quickly create new purchase orders for a vendor based on previous vendor purchases.

Using Purchase from History also tends to consolidate multiple orders into single, larger orders, resulting in lower shipping costs, increased discounts and other operational efficiencies.

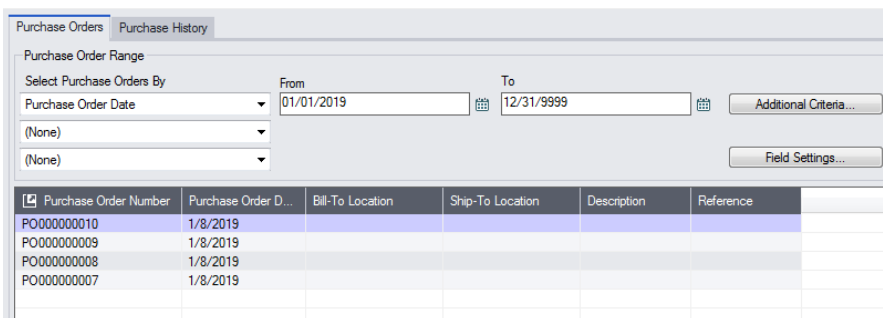
Click the Purchase From History button to display the pop up window. Purchase From History...



- The Purchase Orders tab lets you apply selection criteria and then press the Load button to request previous purchase orders.
- The Purchase History tab is similar, but lets you select using item criteria rather than order criteria.

To create a new PO from prior ones using the Purchase Orders tab

- Use the Purchase Order range fields to select past POs for the vendor, and then click the Load button. In this case, we've chosen purchase orders since January 1, 2019. (You can add or remove fields from the range field dropdown lists using the [Field Settings](#) button – see below.)



- Click the purchase orders lines to see the PO details in the bottom grid.

- Click the Select All and Select None buttons to include all or none of the items in the previous purchase order.
- Double-click the Include column to select individual lines (the Include column displays Yes).

| Line Num... | Include | Include Comments | Include Instructions | Item Number | Item Description | Location | Order UOM | Quantity Or |
|-------------|---------|------------------|----------------------|-------------|---------------------|----------|-----------|-------------|
| 1 | Yes | No | No | A1-400/0 | Desk Note Book | 4 | Ea. | |
| 2 | No | No | No | A1-401/0 | Desk Calendar ... | 4 | Ea. | |
| 3 | Yes | No | No | A1-450/0 | Bulletin Board | 4 | Ea. | |
| 4 | No | No | No | A1-470/0 | Dry-erase White ... | 4 | Ea. | |
| 5 | No | No | No | A1-650/0 | Highlighter | 4 | Ea. | |

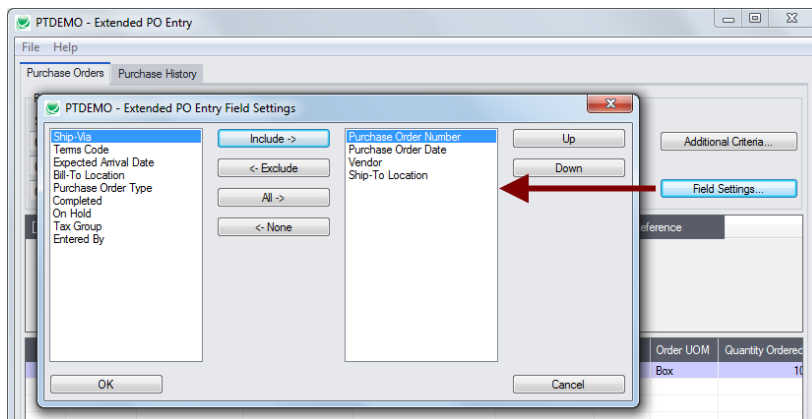
- Edit the **Qty. Ordered** column to change the quantities for the new purchase order that you are creating. (The Quantity Ordered field shows the quantities from the previous PO.)

| Include Comments | Include Instructions | Item Number | Item Description | Location | Order UOM | Quantity Ordered | Qty. Ordered |
|------------------|----------------------|-------------|---------------------|----------|-----------|------------------|--------------|
| No | No | A1-400/0 | Desk Note Book | 4 | Ea. | 200 | 0 |
| No | No | A1-401/0 | Desk Calendar ... | 4 | Ea. | 200 | 0 |
| No | Yes | A1-450/0 | Bulletin Board | 4 | Ea. | 200 | 15 |
| No | No | A1-470/0 | Dry-erase White ... | 4 | Ea. | 200 | 0 |
| No | No | A1-650/0 | Highlighter | 4 | Ea. | 500 | 0 |

- When you have finished the edits for items from this purchase order, click the Purchase button to add the items to the new PO.
- Select another purchase order from the top grid, choose the items that you want to order, enter the new quantities, and again click Purchase.
- Click the Close button when you have finished adding items from prior POs.

Use the “Field Settings” button to customize the list of fields for selecting POs:

Click the **Field Settings** button to change the fields that appear in the “Select Purchase Orders By” dropdown lists on the Purchase From History screen.



- The list of fields on the right are the fields that will appear in the Select Purchase Orders By dropdown.
- To add a field to the dropdown list, select it in the list on the left, and click the Include button.

Using the Purchase History tab

The Purchase History tab allows a similar sequence of operations – selection, editing of quantities and copying to the purchase order.

Quick PJC Entry

To speed up data entry, Extended PO Entry will default inserted lines to the previous entry's selections for Contract, Project and Category when multiple lines use the same selections.

The following form shows how the order form appears immediately after pressing the Insert key to create the second line (with default values for the Contract, Project, Category and Cost Class fields):

PTDEMO - Extended PO Entry

File Help P/O Purchase Order Entry

PO Number: *** NEW *** Entered By: []

Vendor Number: 1580 Vendor Name: Grant Office Supplies Last Receipt No.: []

Order Taxes Optional Fields Rates Totals * Required

Template: [] From Requisition: [] On Hold: [] Job Related: [x]

PO Date: 01/10/2020 FOB Point: [] Arrival Date: []

PO Type: Active

Ship-To Location: [] Ship-Via: []

Bill-To Location: [] Terms Code: DUETBL Due by Invoice Date: []

Vendor Acct. Set: USA Accounts payable, Other: []

Description: [] Reference: []

| Completed | Contract | Project | Category | Cost Class | Item Number | Item Description | Location |
|-----------|-------------|---------|-----------|------------|-------------|-------------------------|----------|
| No | 120-1200-10 | 1012 | UPGRLABOR | Labor | 100070 | Embleton, Robert Wilson | |
| No | 120-1200-10 | 1012 | UPGRLABOR | Labor | | | |

Item/Tax... Calc. Taxes Consolidate Item Finder... Drop Ship... Order Subtotal: 0.00 USD

Post Delete History... Purchase From History... Close

| Location | Qty. On Hand | Qty. On Sales Order | Qty. On Purchase Order | Qty. Committed | Qty. Available |
|---------------|--------------|---------------------|------------------------|----------------|----------------|
| All Locations | 0 | 0 | 0 | 0 | 0 |