

Extended Ship-To Location

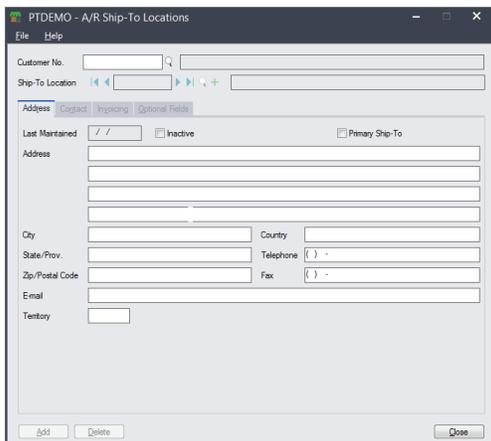
Extended Ship-To Location is an enhanced replacement for the Sage A/R Ship-To Locations form. It provides you with more features while adding or editing a ship-to location and fast access to customer information.

The Extended Ship-To Location window lets you:

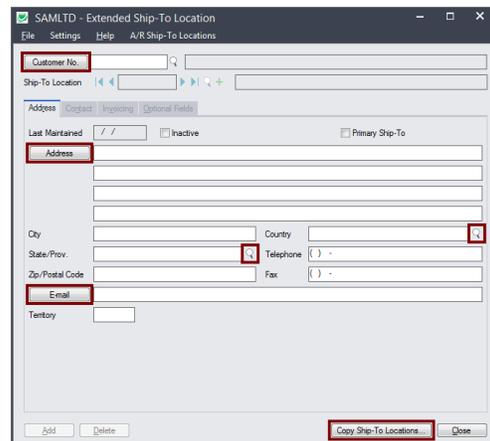
- Use a “SmartFinder” to look up customers and existing ship-to addresses.
- Enforce Country Codes at data entry time to force country, state and province fields to match ISO 3166 codes. This option also provides Finders for looking up country, state and province codes.
- Display customer addresses in Google maps.
- Create new emails for the Customer and Contact email addresses.
- Maintain ship-to locations for customers across multiple Sage 300 companies using the Copy Ship-To Locations functionality.

The following pictures show the extra buttons on the Extended Ship-To Location screen:

Sage A/R Ship-To Locations screen

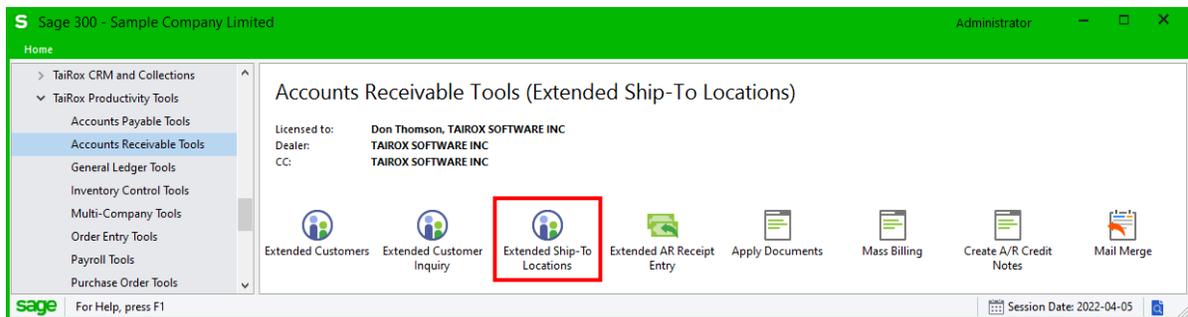


TaiRox Extended Ship-To Location screen

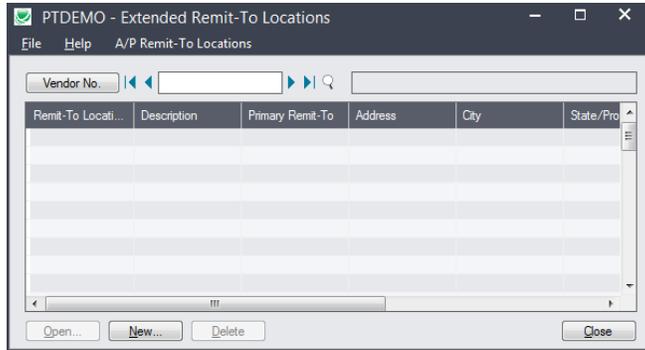


Using Extended Ship-To Location

You get to the Extended Ship-To Location window by first opening Extended Ship-To Locations under **TaiRox Productivity Tools > Accounts Receivable Tools** on the Sage 300 desktop.



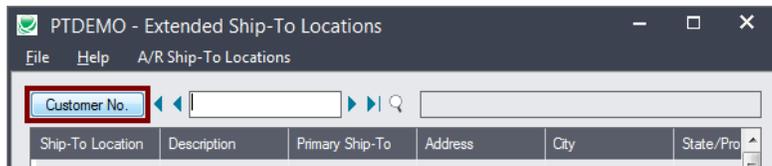
- The Extended Ship-To Locations window appears as follows:



- Click the New button to add a new ship-to location.
- Click the Customer No. button to select a customer using the SmartFinder and display existing ship-to locations.
 - Double-click a ship-to location to edit the existing information, or click New to a add a new location.

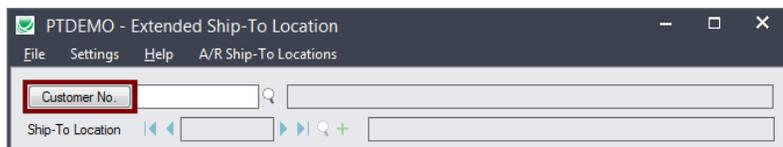
Look up customers and ship-to addresses using the Customer Number SmartFinder

- Click the Customer No. button at the top of the Extended Ship-To Locations form.



Or

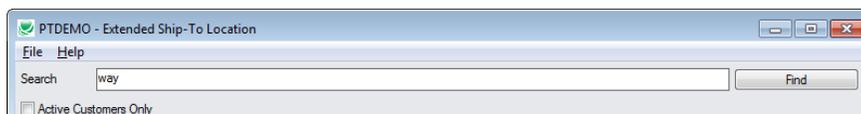
- Click the New button on the Extended Ship-To Locations form.
- Then click the Customer No. button at the top of the Extended Ship-To Location form.



The SmartFinder search form will appear for customers and ship-to locations.

How to use 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 customers.
- Search returns customers and ship-to location records which contain the search string in any of the searched fields – for example, one record may have “way” 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:

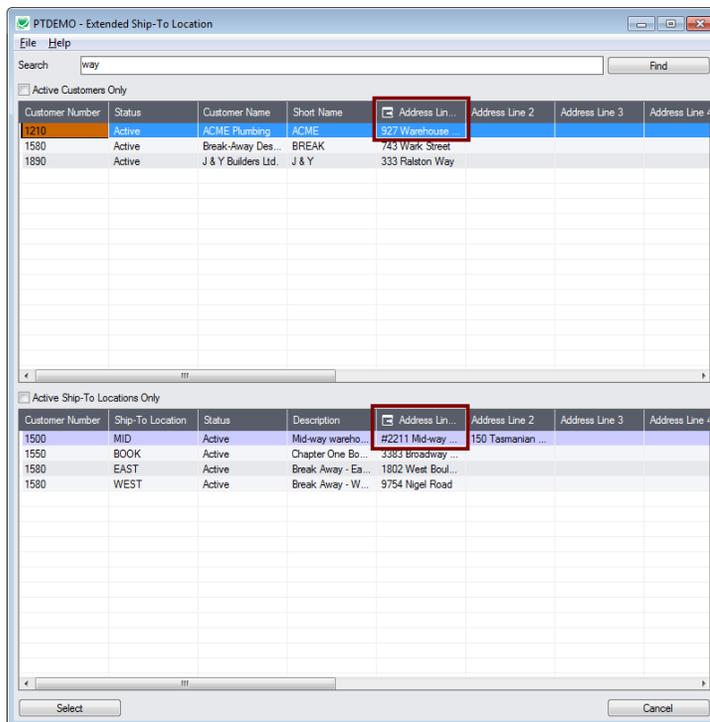
- *All of the word fragments must be present in one of the fields being searched.* (For example, if you searched for "Ross Blvd", you will **not** see a customer where "Ross" is in the Customer Name field and "Blvd" is in the Address 1 field.)
- Addresses (e.g. the customer address) are treated as a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

What's displayed in the Search form:

- The top grid displays the customers matching the search criteria.
- The bottom grid displays the ship-to locations that match the search criteria. You can also filter by Active Ship-To Locations.

Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen. The screen below displays ship-to locations for two different customers.

- Click the Address Line 1 column heading or double-click the address to launch **Google Maps** with the customer address.



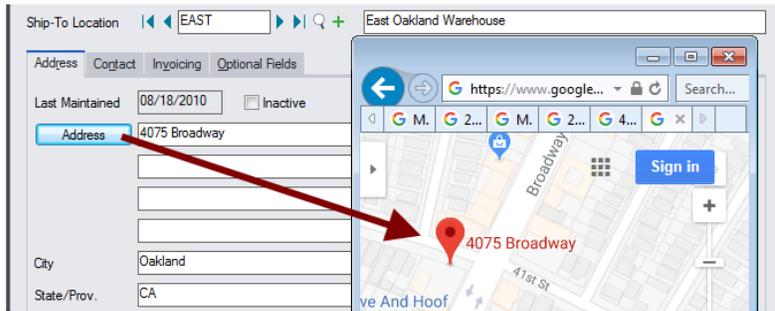
- Double-click email addresses (such as the Contact E-mail) to create new emails.

How to select:

- Double-click a customer in the top grid to select and enter the customer on the Extended Ship-To Location form.
- Double-click a ship-to location in the bottom grid to enter the customer (and ship-to address if looking up the location on the Extended Ship-To Location form).

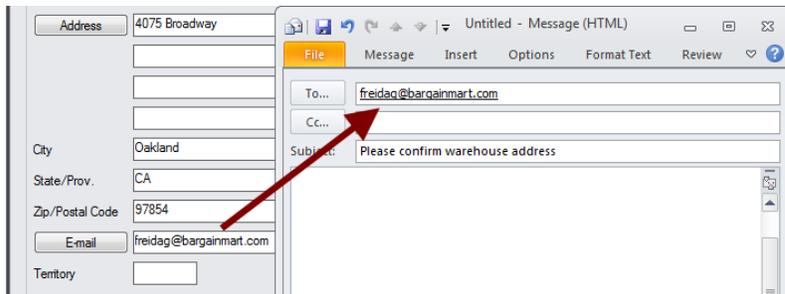
Look up addresses in Google Maps

- Click the Address button on the Extended Ship-To Location screen to confirm the address.



Launch emails for customers and customer contact email addresses

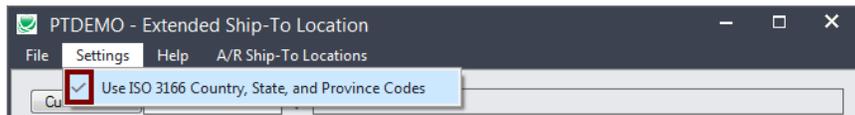
- Click the E-mail button on the Address or Contact tabs to quickly create a new email.



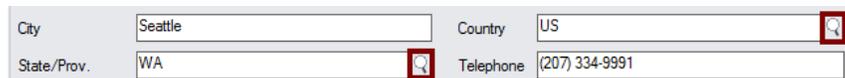
Enforce ISO 3166 country codes

Use this option to force country, state and province codes to match ISO 3166 codes, and to use Finders to select country, state, and province codes. (Useful if your Sage 300 addresses are feeding into shipping software.)

- This setting can only be changed by the Sage 300 ADMIN.
- Choose Settings from the Extended Ship-To Location menu.



- If you want to use this option, make sure it displays the checkmark.
- The program will also display new Finder buttons to let you select ISO country, state, and province codes from Finder lists.



- An error message will appear when you click Save if the codes are not valid. You must fix them before you can save the ship-to location record.

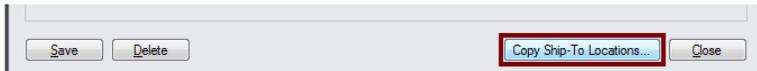
Copy Ship-To Locations to other Sage 300 companies

IMPORTANT:

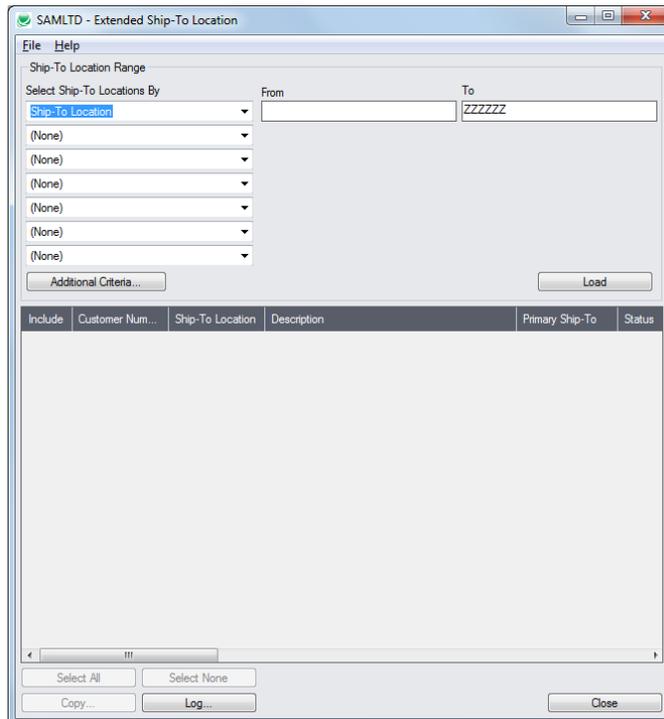
You must enter a User ID and Password to copy ship-to locations. Make sure the User ID has sufficient rights to complete the operation in the target companies.

If you are inserting new ship-to locations in other companies, check that a current backup exists for the databases being affected.

- Open the Sage 300 company with the ship-to locations that you want to copy.
 - Copy Ship-To Locations operates from within an existing "source" company, and lets you copy ship-to information to other Sage 300 company databases.
- Open the Extended Ship-To Location form, and click the Copy Ship-To Locations button at the bottom of the screen.



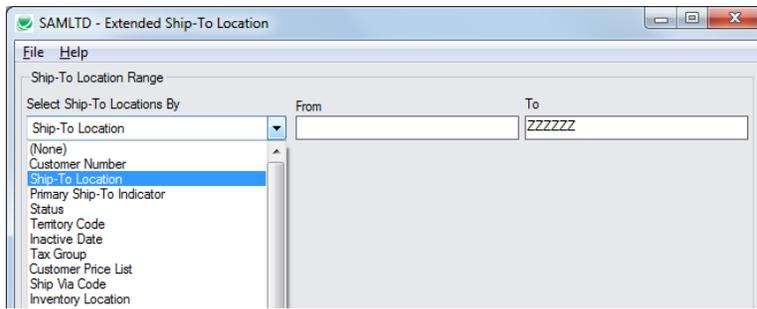
When you click the Copy Ship-To Locations button, a window will pop up for selecting the ship-to locations in the source company.



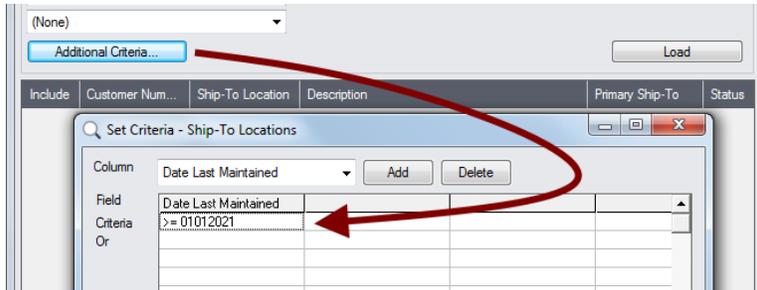
Note: By default, the grid at the bottom of the form will display any new ship-to locations that were added in this session. This allows you to bypass the selection process and copy these new ship-to locations directly to other Sage company databases.

Specify a range of ship-to locations for copying:

You can specify ranges for up to seven ship-to location fields to use for location selection – including the customer number, ship-to location code, primary ship-to indicator, territory code, tax group, customer price list, ship via code, inventory location, salesperson, or any of the optional fields that you use for ship-to locations.

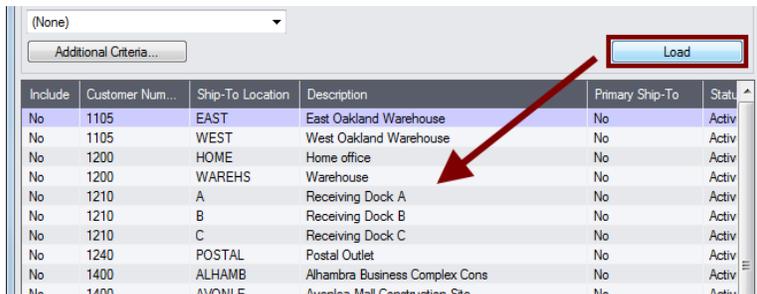


Choose additional criteria:



- Click the Additional Criteria button to further restrict the codes for copying. In this case, we are selecting locations that were last maintained after Jan 1, 2021. Click OK to save.

Load the list of locations and choose which ones to copy:



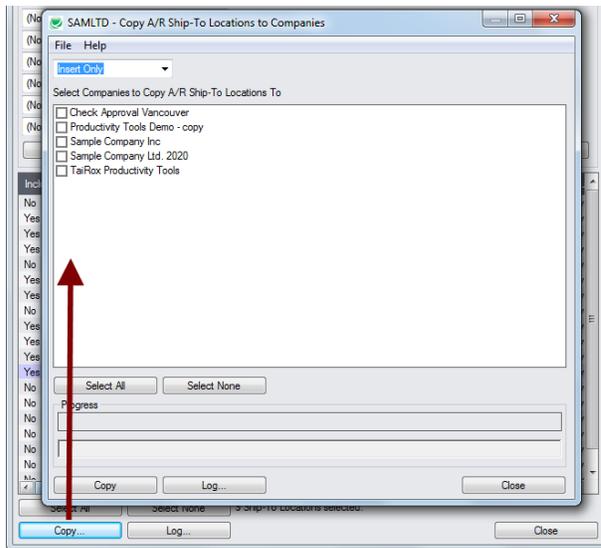
- Click the Load button to display the list of ship-to locations.
 - When the Load button is pressed, the program will display the ship-to locations in the range and with the additional criteria you specified.
 - You can adjust the ship-to location range or additional criteria if necessary, then click Load again.
- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the ship-to locations loaded in the grid.



- Double-click in the Include column to “cherry-pick” locations:

| Include | Customer Num... | Ship-To Location | Description | Primary Ship-To | Status |
|---------|-----------------|------------------|------------------------|-----------------|--------|
| No | 1105 | EAST | East Oakland Warehouse | No | Activ |
| Yes | 1105 | WEST | West Oakland Warehouse | No | Activ |
| No | 1200 | HOME | Home office | No | Activ |
| No | 1200 | WAREHS | Warehouse | No | Activ |

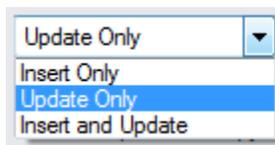
Click the Copy button to display the “To Companies” screen:



Select whether to insert new codes or update existing ones in target companies:

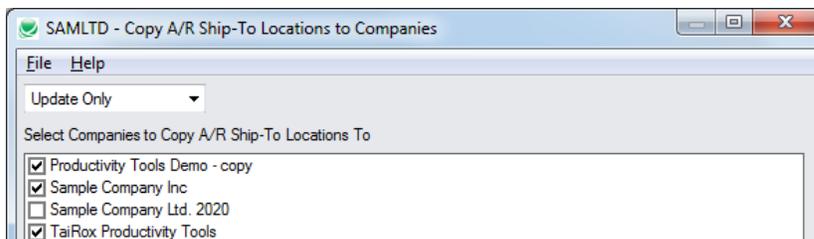
Before proceeding, you must decide whether to add or update locations in the target companies.

For example, choose Update Only to update information for all existing ship-to locations in the target companies – but add no new codes.



- Choose whether to insert, insert and update, or just update ship-to locations.
 - Insert Only will only add codes if the code does not already exist.
 - Update Only will only update codes that already exist.
 - Insert and Update will perform both of these operations.

Select target Sage 300 companies:

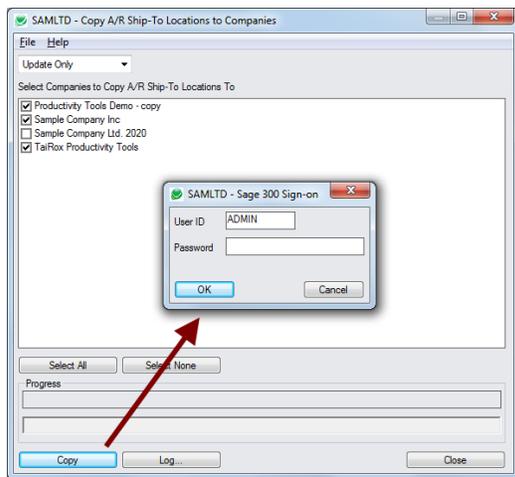


- Click the Select All and Select None buttons at the bottom of the screen to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

Click the Copy button in the pop-up To Companies screen to copy ship-to locations:



- Click the Copy button to start the copy procedure.
 - Enter your User ID and password in the Sage 300 Sign-On window and click OK.
- Note:** You MUST have sufficient permissions to update ship-to locations in the target companies for copying to proceed.
- The program will copy the ship-to locations to the target companies.
 - If no changes are required for a selected location, the record will not be updated – so the audit stamp will be preserved.

Click the Log button to confirm which ship-to locations were processed:

```

4/14/2021 3:06:21 PM Copy A/R Ship-To Locations to Companies started.
4/14/2021 3:06:21 PM
4/14/2021 3:06:21 PM Performed by user: ADMIN
4/14/2021 3:06:21 PM
4/14/2021 3:06:21 PM Update Only
4/14/2021 3:06:21 PM Copy A/R Ship-To Locations to Companies: Productivity Tools Demo - copy
4/14/2021 3:06:21 PM Sample Company Inc
4/14/2021 3:06:21 PM TaiRox Productivity Tools
4/14/2021 3:06:21 PM
4/14/2021 3:06:21 PM Copying ship-to locations from Sample Company Limited to Productivity
Tools Demo - copy started.
4/14/2021 3:06:21 PM Logging in to Productivity Tools Demo - copy...
4/14/2021 3:06:22 PM Updating ship-to location 1105-WEST...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1200-HOME...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1200-WAREHS...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1210-B...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1210-C...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1400-ALHAMB...
4/14/2021 3:06:22 PM Ship-To location updated.
4/14/2021 3:06:22 PM Updating ship-to location 1400-AVONLE...
4/14/2021 3:06:22 PM Ship-To location updated.
=====
    
```

The Log lists:

- The user and the type of operation performed.
- Each ship-to location that was processed and whether the records were updated.