Productivity Tools

Operations Programs

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Productivity Tools Overview

- **70 Programs**
  - 27 Financial
  - 41 Operations
  - 2 Administrative

- **Productivity Means Saving Time**
  - Faster Data Entry
  - Faster Posting Operations
  - Faster Multi-Company Maintenance
  - Less Time Spent Finding and Fixing Mistakes
  - Fair Customer Treatment (Less Customer Complaints)

Productivity Tools: Program Names

- **Extended**
  - The program "takes over" a Sage 300 UI
- **Complete, Delete, Update, Ship, Invoice, Apply, etc.**
  - The program performs hundreds of operations
- **Inquiry, Status, Look Up**
  - The program provides improved visibility into data

Productivity Tools Videos

TaiRox

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41 Programs Enhance Operations (OE, PO, IC)

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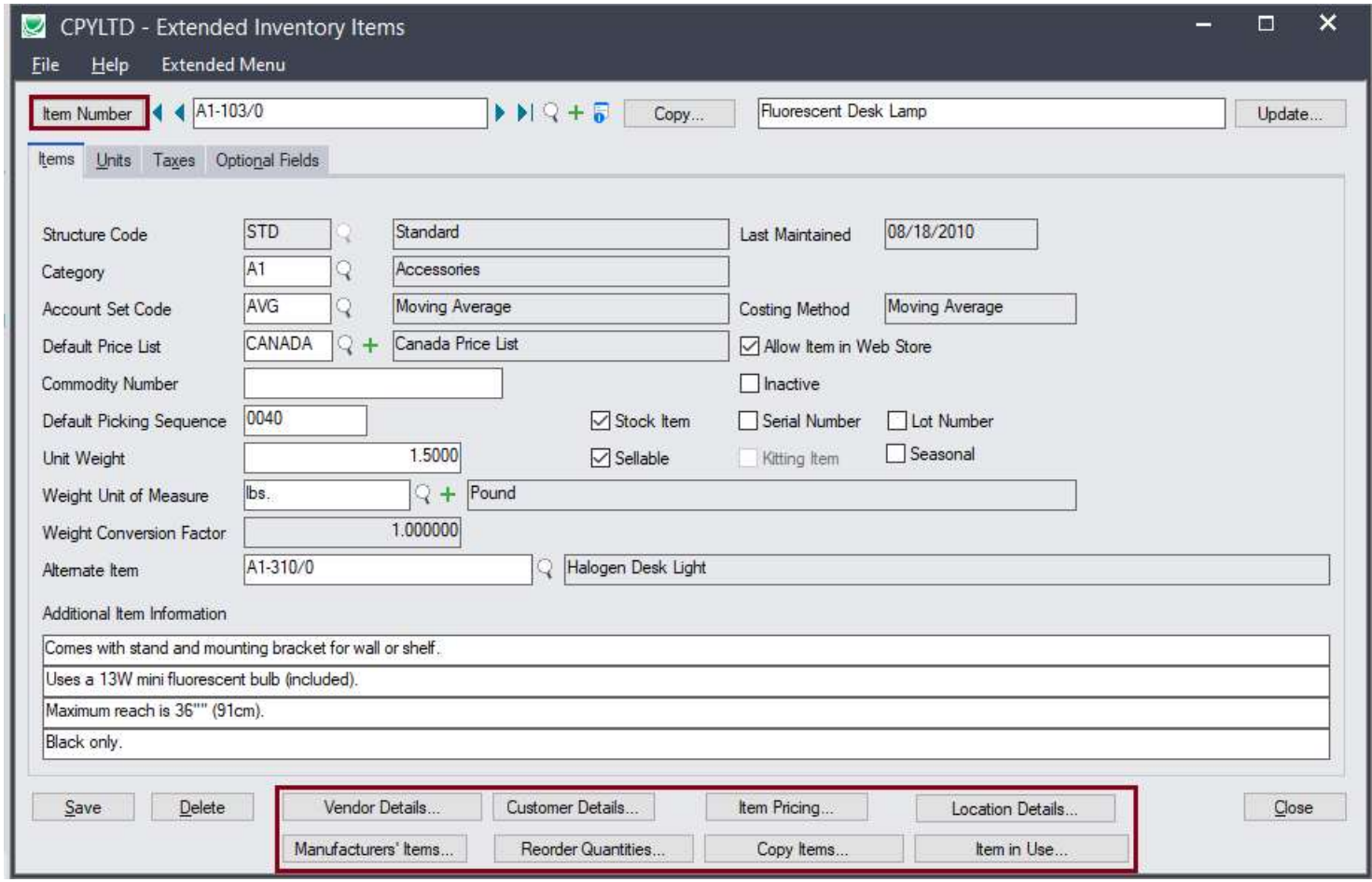
- 16 Inventory Control Programs
  - "Large" (lots of items, expensive items)
- 17 Order Entry Programs
  - "Large" (lots of orders, customers or lines/order)
- 8 Purchase Orders Programs
  - "Large" (lots of POs, vendors or lines/PO)

16 Inventory Control Programs

- Extended Inventory Items
- Extended Locations
- Extended Vendor Details
- Extended Customer Details
- Extended Location Details
- Extended Manufacturers' Items
- Extended Item Pricing
- Extended Reorder Quantities
- Extended I/C Segment Codes
- Stock Reorder
- Mail Merge
- Fix Item Valuation Errors
- Delete Items
- Delete BOMs
- Kit Component Usage Inquiry
- Remove Items from Price Lists

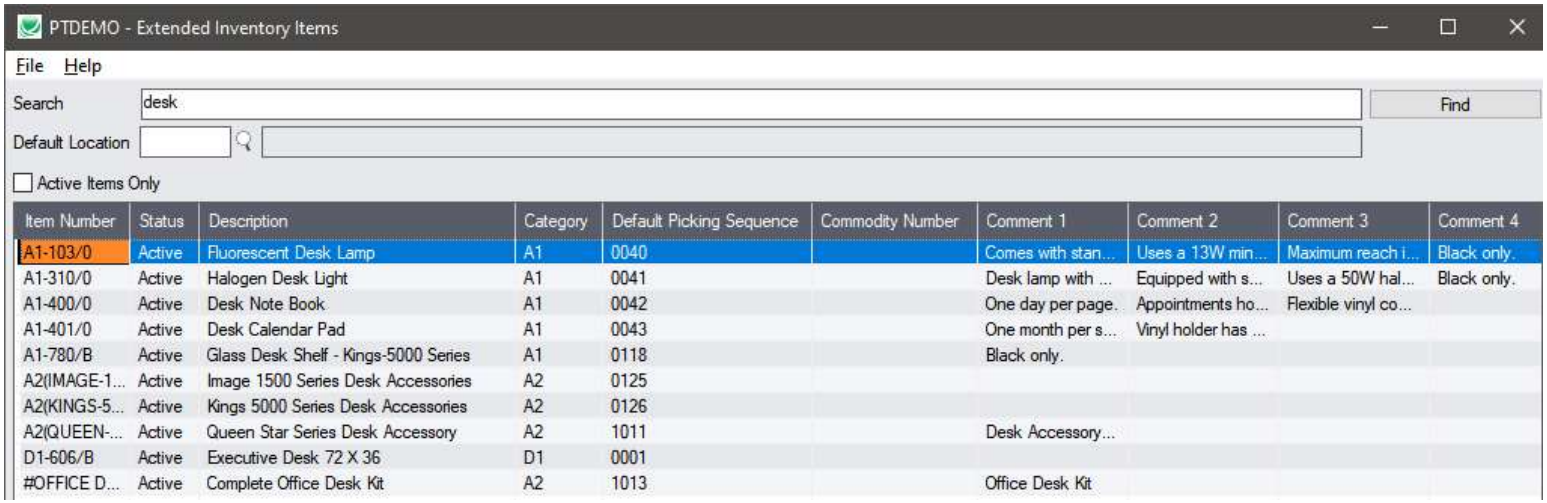
Extended Inventory Items

- SmartFinder
- Launchers
- Multi-Company Copy
- Item in Use



I/C Item SmartFinder

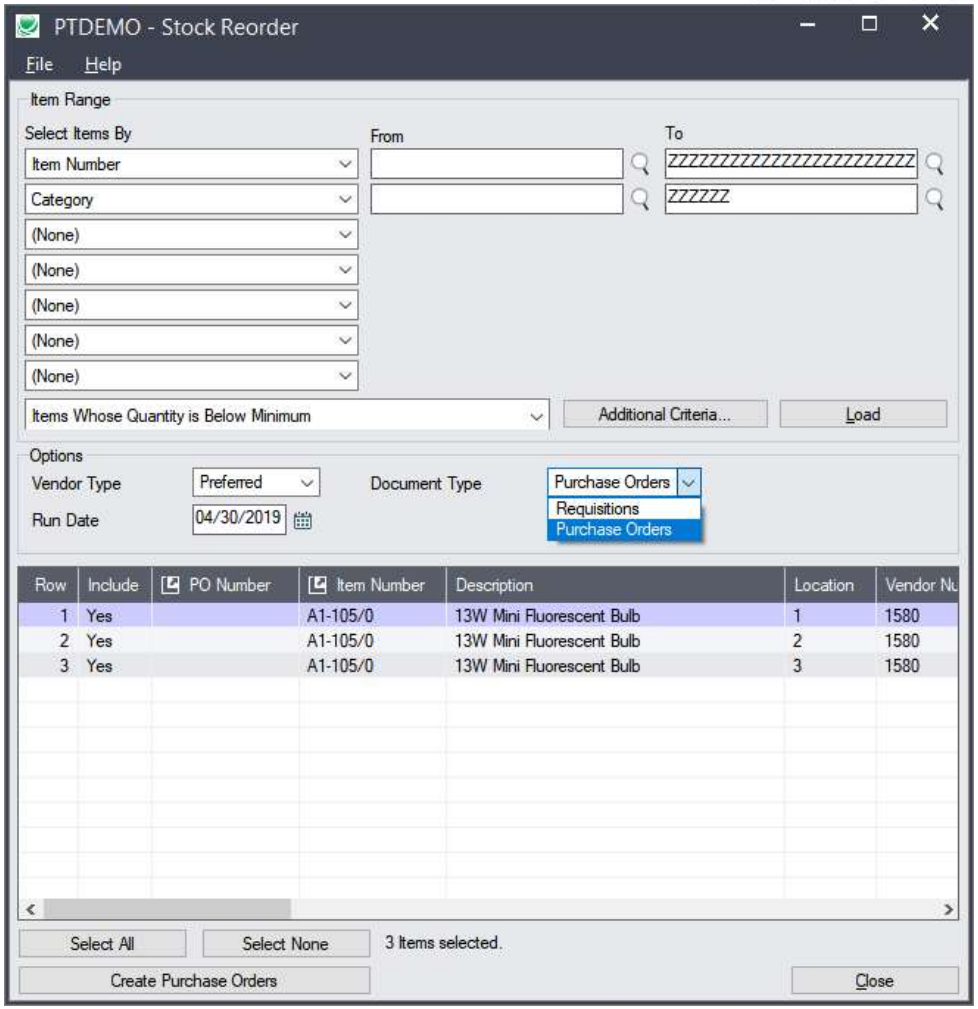
- 20,000 Inventory Items with Diverse Descriptions
  - Wood Screw, Flat Head, Steel, #8, half-inch
  - 0.5" Phillips Brass Screw, #8
  - One-inch Metal Slotted Flat Head Screw, #4
  - Robertson half-inch wood screw, zinc plated
  - … bolts, nuts, washers, nails, s-hooks, spacers, rivets, clamps, …



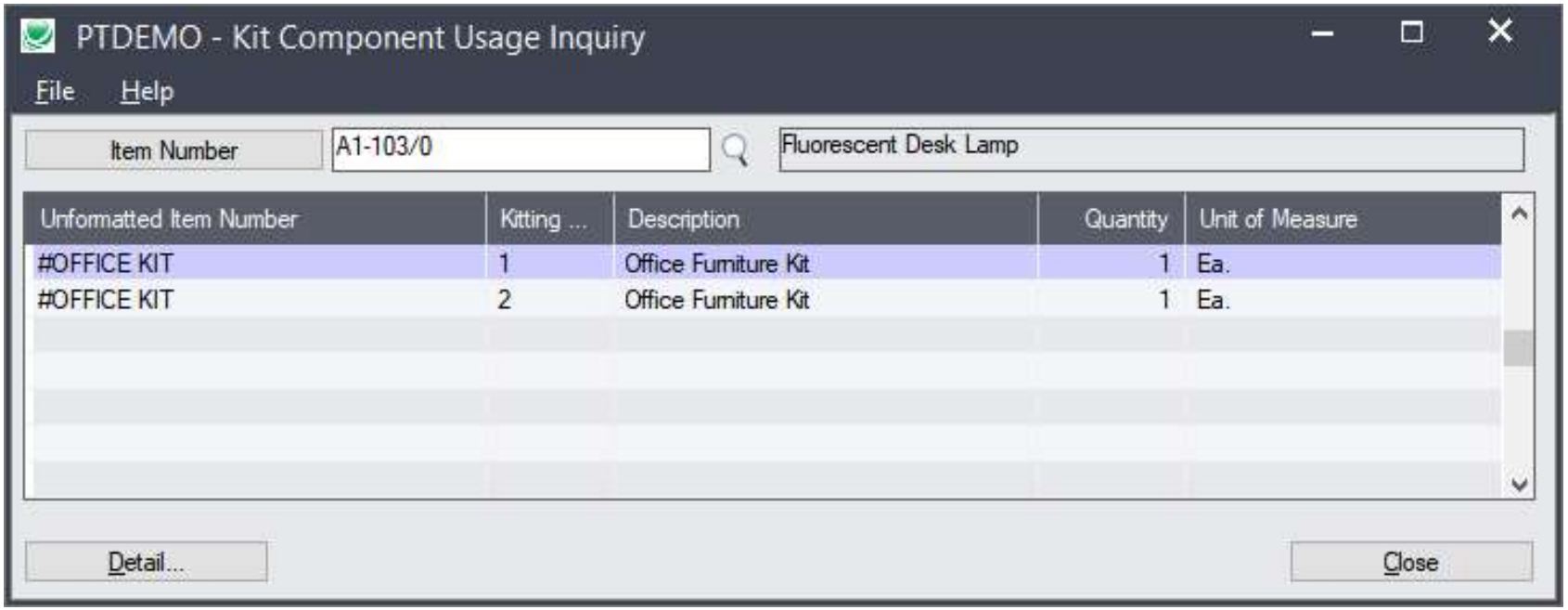
Item Number	Status	Description	Category	Default Picking Sequence	Commodity Number	Comment 1	Comment 2	Comment 3	Comment 4
A1-103/0	Active	Fluorescent Desk Lamp	A1	0040		Comes with stan...	Uses a 13W min...	Maximum reach i...	Black only.
A1-310/0	Active	Halogen Desk Light	A1	0041		Desk lamp with ...	Equipped with s...	Uses a 50W hal...	Black only.
A1-400/0	Active	Desk Note Book	A1	0042		One day per page.	Appointments ho...	Flexible vinyl co...	
A1-401/0	Active	Desk Calendar Pad	A1	0043		One month per s...	Vinyl holder has ...		
A1-780/B	Active	Glass Desk Shelf - Kings-5000 Series	A1	0118		Black only.			
A2(IMAGE-1...	Active	Image 1500 Series Desk Accessories	A2	0125					
A2(KINGS-5...	Active	Kings 5000 Series Desk Accessories	A2	0126					
A2(QUEEN-...	Active	Queen Star Series Desk Accessory	A2	1011		Desk Accessory...			
D1-606/B	Active	Executive Desk 72 X 36	D1	0001					
#OFFICE D...	Active	Complete Office Desk Kit	A2	1013		Office Desk Kit			

Stock Reorder

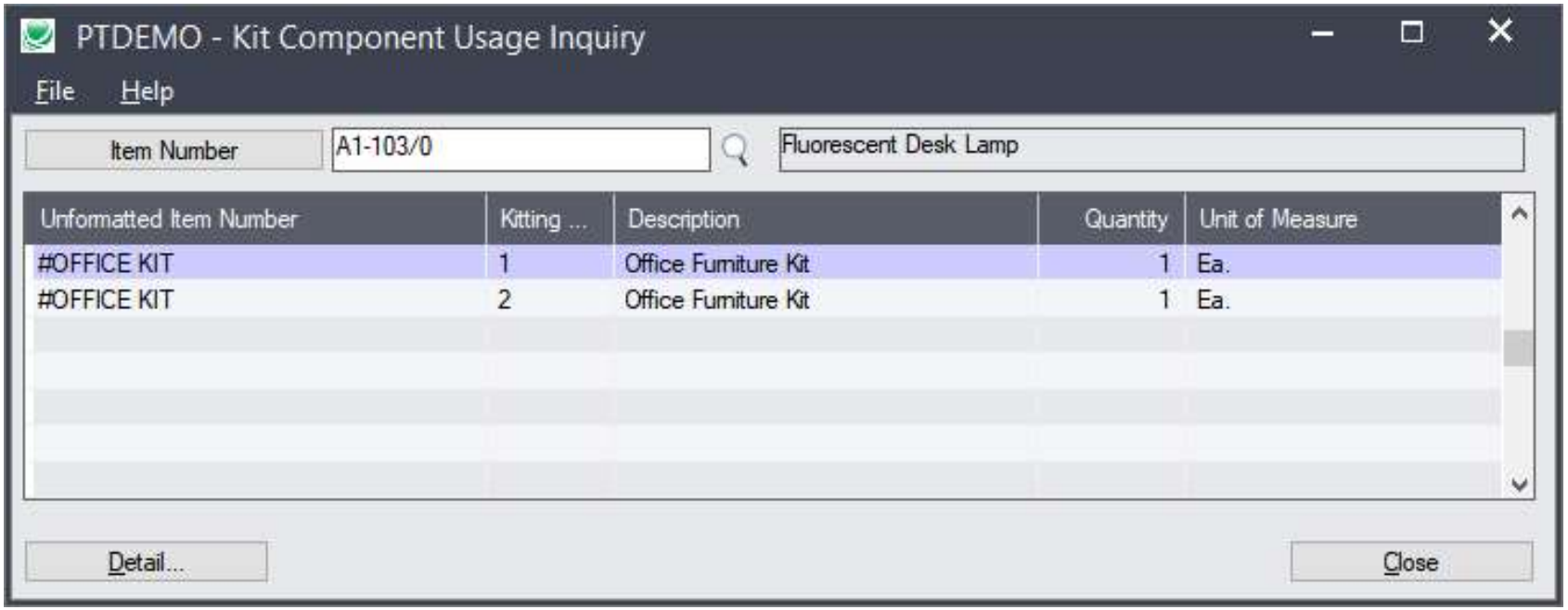
- POs or Requisitions
- Preview
- Save to Excel
- Load from Excel



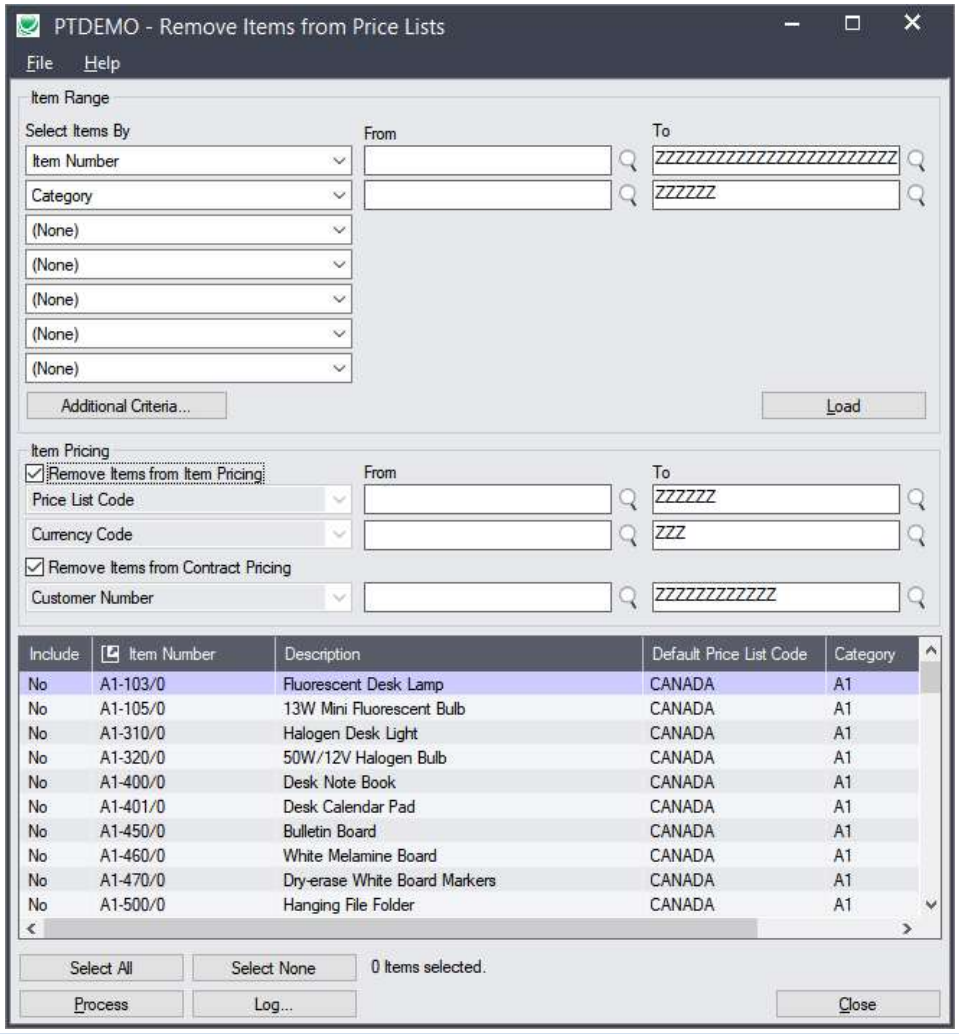
Kit Component Usage Inquiry



Kit Component Usage Inquiry



Remove Items from Price Lists



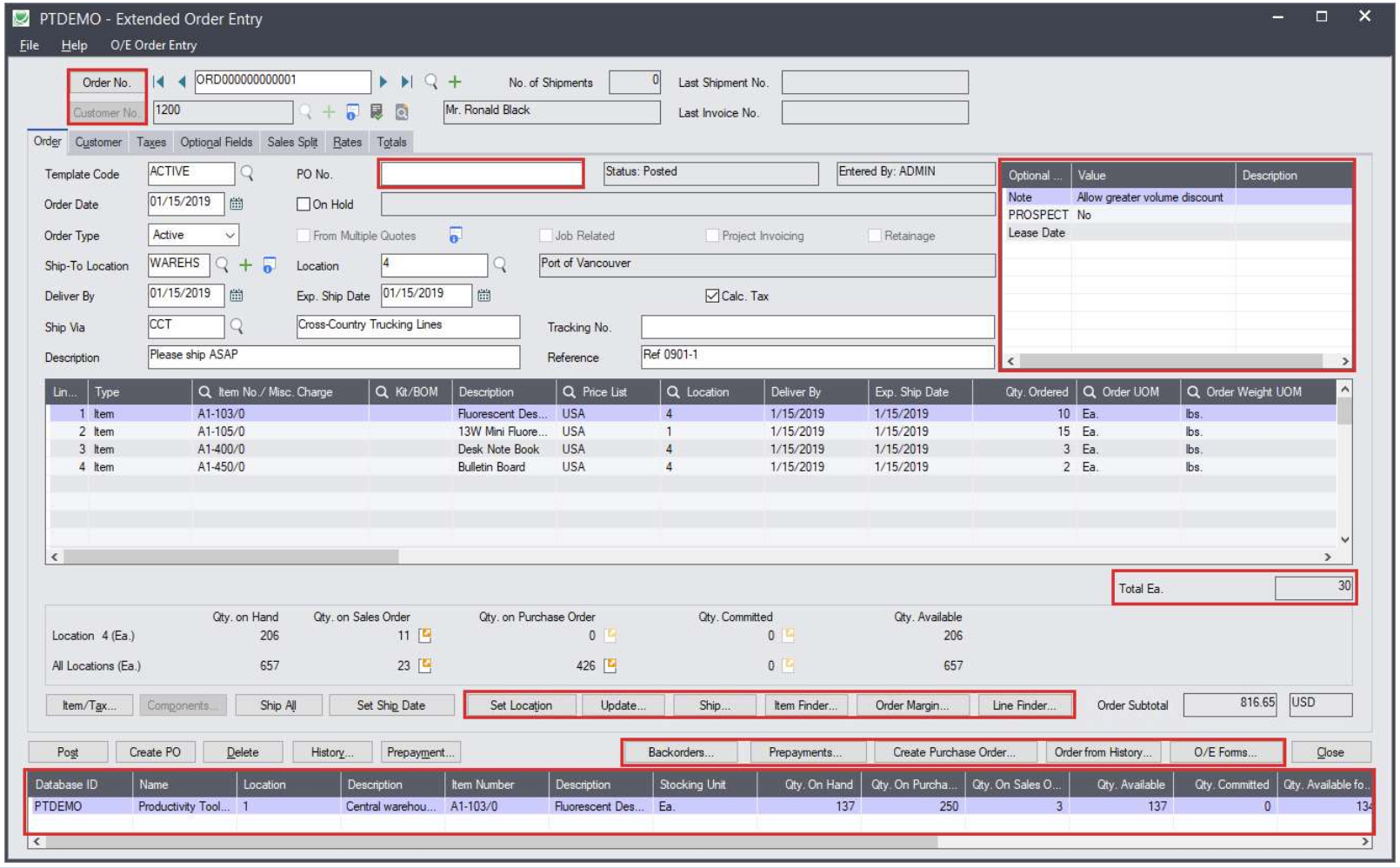
I/C Benefit Summary

- Extended Inventory Items – SmartFinder, Launchers, Multi-Company
- Extended (Various) – SmartFinder, Screen Integration
- Stock Reorder – Flexibility
- Mail Merge – MS Office Integration
- Delete Items, Delete BOMS – Shows all that can be deleted
- Kit Component Usage Inquiry – Which kits use a specific item
- Remove Items from Price Lists – Including from Contract Pricing

17 Order Entry Programs

- Extended Order Entry
- Extended Shipment Entry
- Extended O/E Invoice Entry
- Extended DR/CR Note Entry
- Ship Orders
- Invoice Shipments
- Update Orders
- Update Shipments
- Delete Orders
- Delete Quotes
- Complete Orders
- Create O/E Credit Notes
- Extended Ship-Via Codes
- Sales History Inquiry
- Shipment Picking Slips
- Email Packing Slips

Extended Order Entry

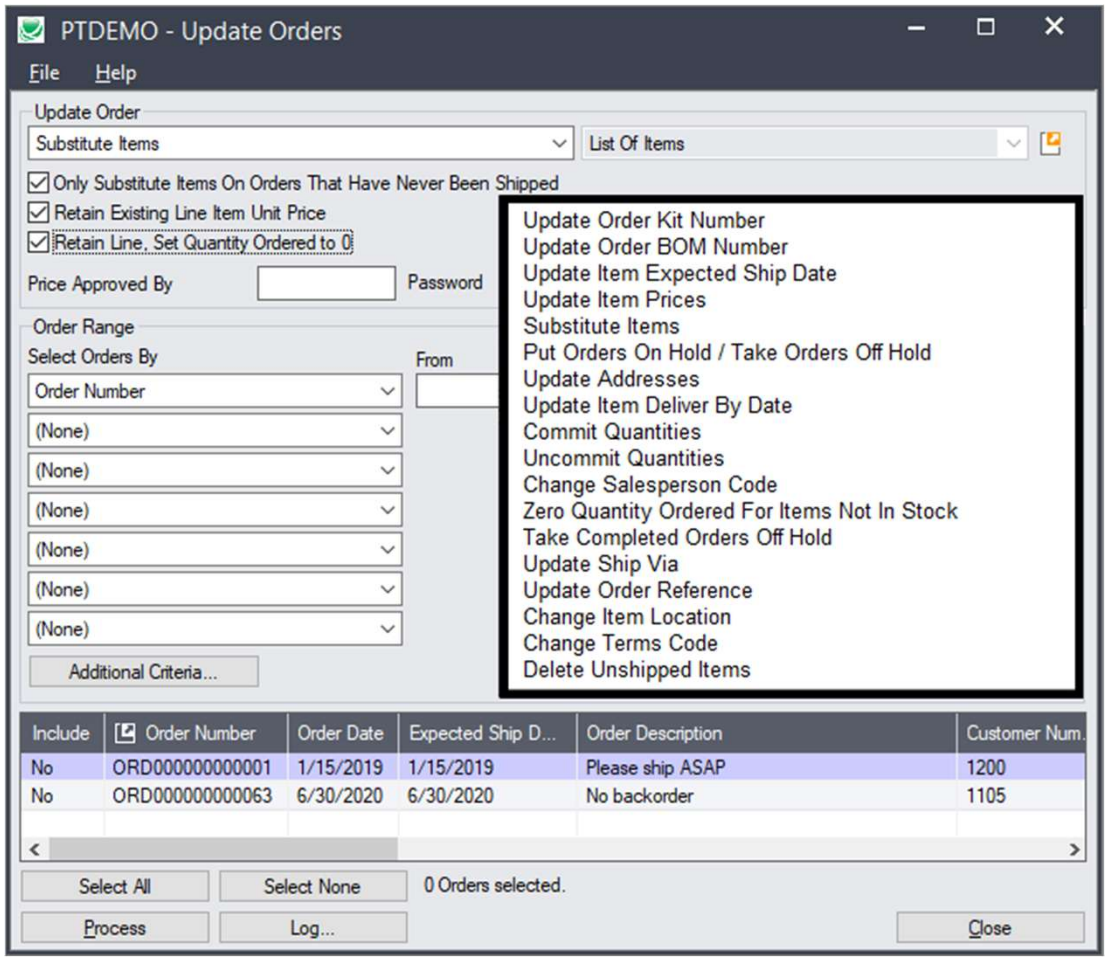


Extended Order Entry

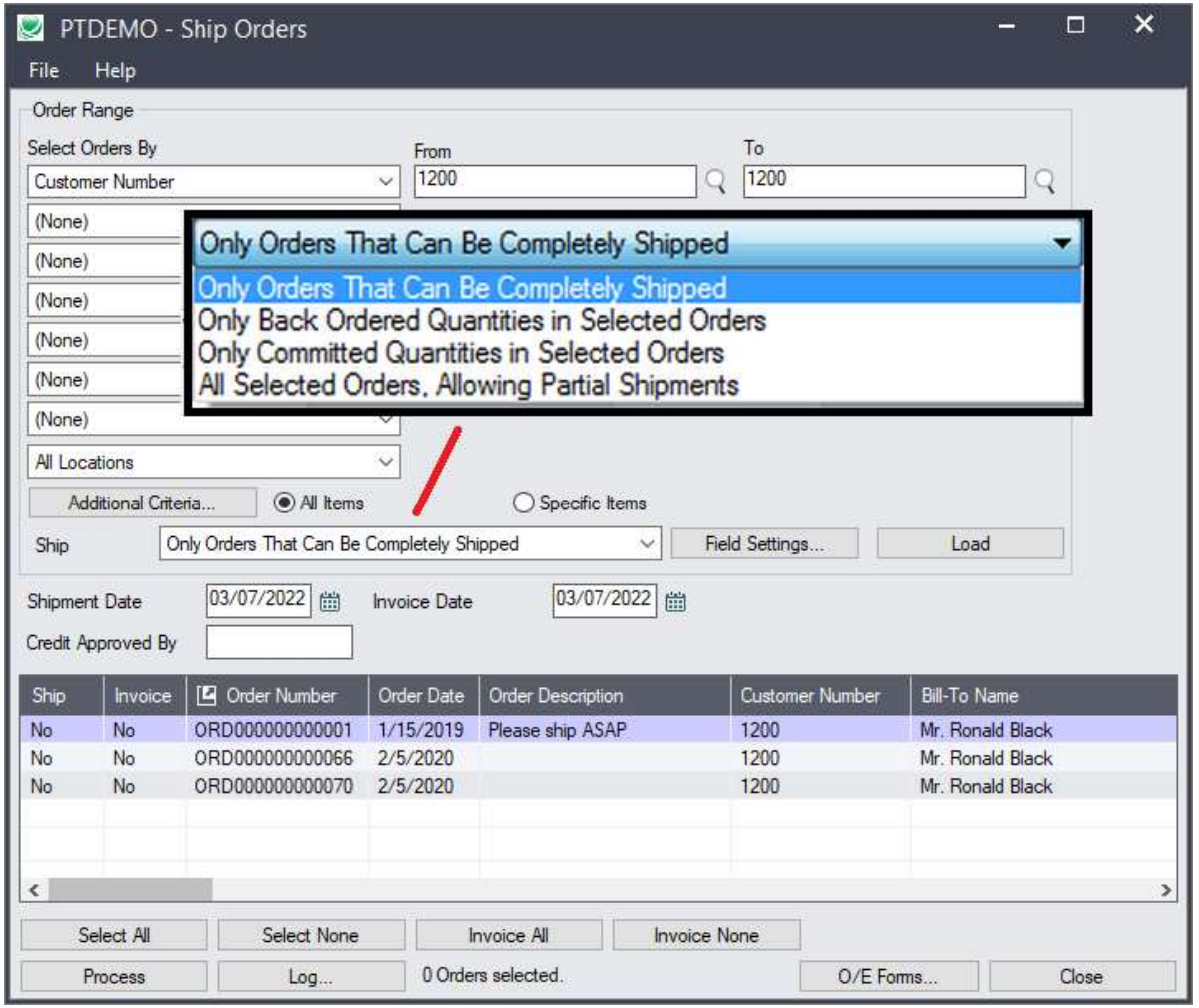
- Side-by-Side Comparison

Area	Sage 300 – Standard Order Entry	TaiRox Extended Order Entry
Overall Purpose	Core transactional order entry	Enhanced replacement screen with productivity, visibility, and control
Order / Customer / Item Search	Basic Finder (limited fields, single-table search)	**SmartFinder** – Google-like search across multiple fields and tables (orders, customers, items, ship-to, contacts, comments)
Item Selection	Limited item finder	**Advanced Item Finder** with price, availability (current & all locations), comments, manufacturer item no. **(Note:** Search for manufacturer's item numbers is a Productivity Tools **Enterprise** feature.)
Large Order Navigation	Scroll manually line by line	**Line Finder** – instantly find any line by item, description, location, comments, picking sequence
Optional Fields (Header)	View/edit via separate screens	**Display customer optional fields directly on OE screen**
Optional Fields (Lines)	Not inline	**Inline optional fields in detail grid** (Enterprise)
PO Number Control	Manual discipline only	**Enforce PO number** by customer or optional field; warn on duplicates
Margin & Cost Visibility	Not visible during entry	**Real-time margin %, markup %, margin amount, recent cost** on each line and order
		Edit kits on the fly (components, quantities, pricing) without creating new kit items

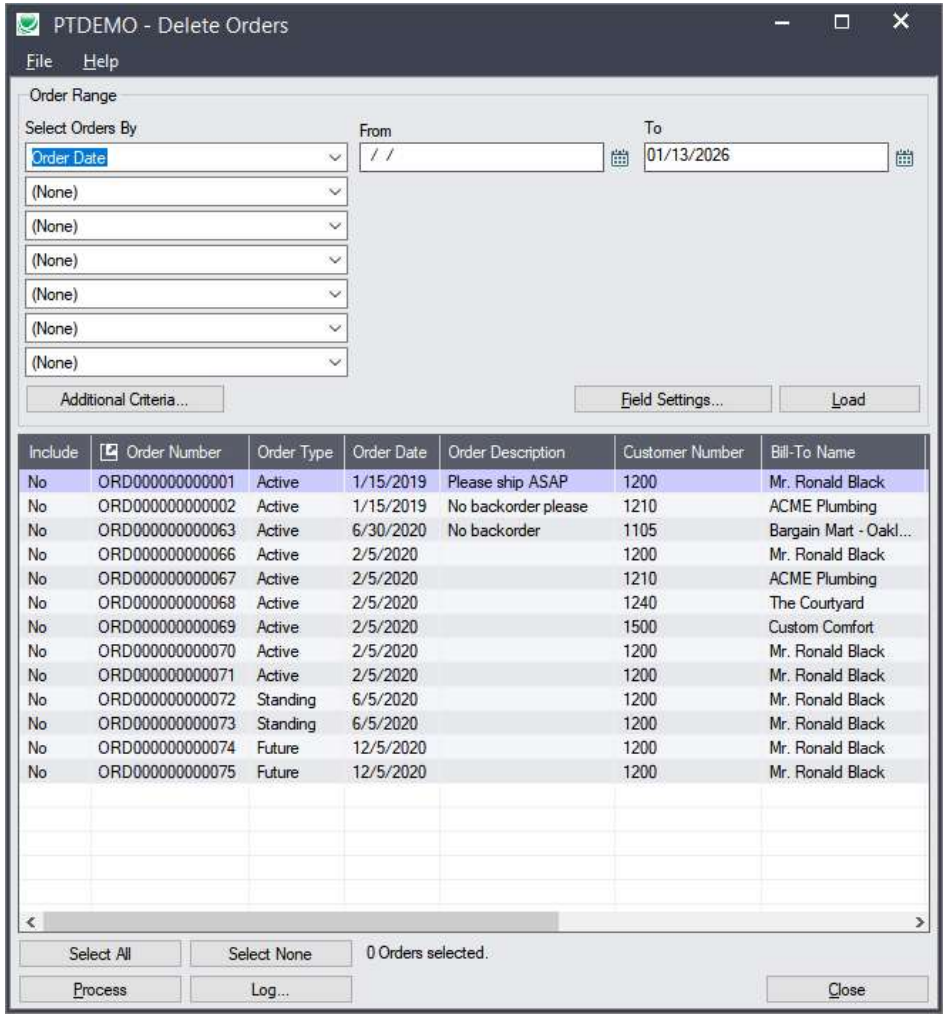
Update Orders



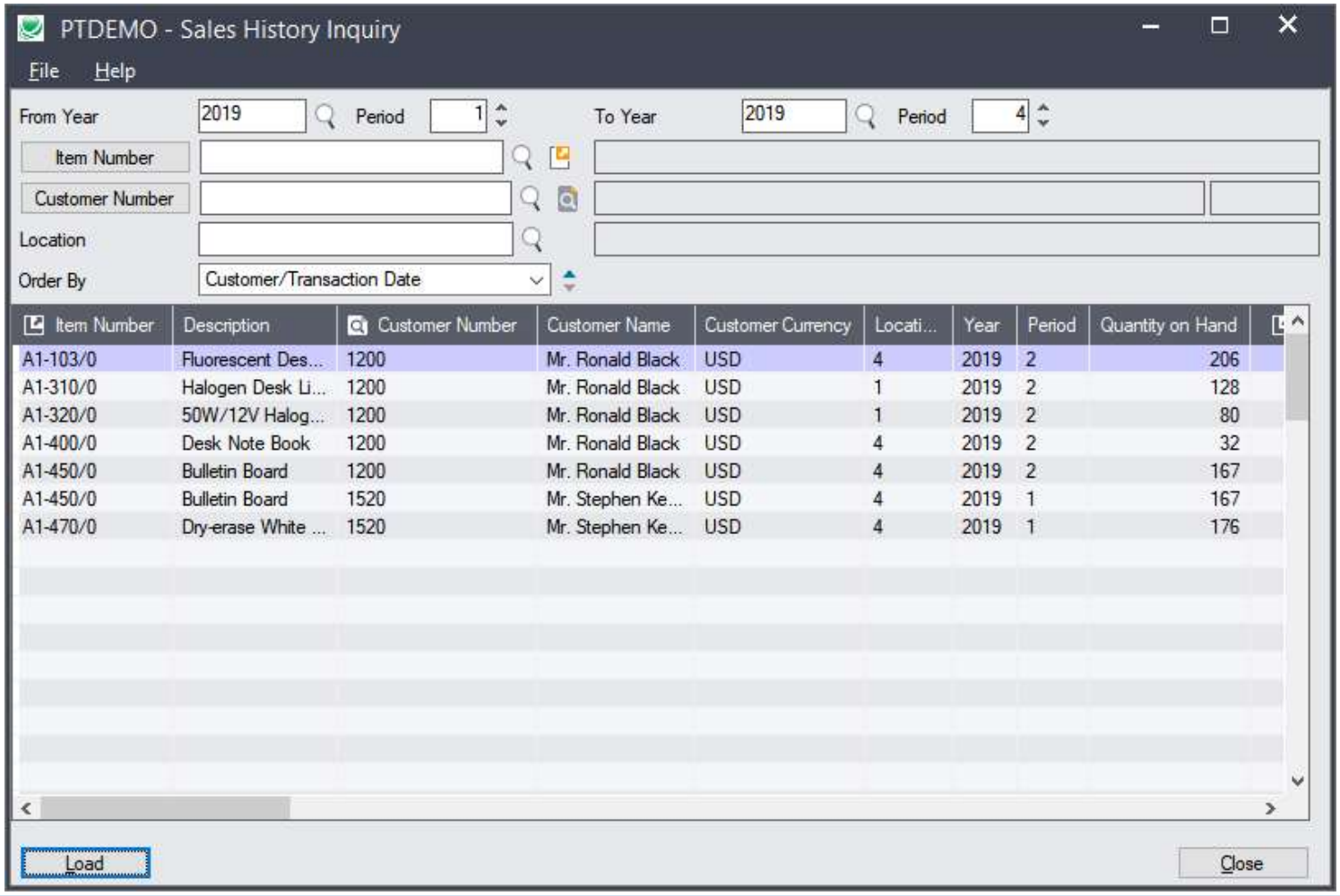
Ship Orders


PTDEMO - Ship Orders
File
Help
Order Range
Select Orders By
Customer Number
From
1200
To
1200
(None)
(None)
(None)
(None)
(None)
(None)
Only Orders That Can Be Completely Shipped
Only Orders That Can Be Completely Shipped
Only Back Ordered Quantities in Selected Orders
Only Committed Quantities in Selected Orders
All Selected Orders, Allowing Partial Shipments
All Locations
Additional Criteria...
All Items
Specific Items
Ship
Only Orders That Can Be Completely Shipped
Field Settings...
Load
Shipment Date
03/07/2022
Invoice Date
03/07/2022
Credit Approved By
Ship
Invoice
Order Number
Order Date
Order Description
Customer Number
Bill-To Name
No
No
ORD000000000001
1/15/2019
Please ship ASAP
1200
Mr. Ronald Black
No
No
ORD000000000066
2/5/2020
1200
Mr. Ronald Black
No
No
ORD000000000070
2/5/2020
1200
Mr. Ronald Black
Select All
Select None
Invoice All
Invoice None
Process
Log...
0 Orders selected.
O/E Forms...
Close

Delete Orders



Sales History Inquiry



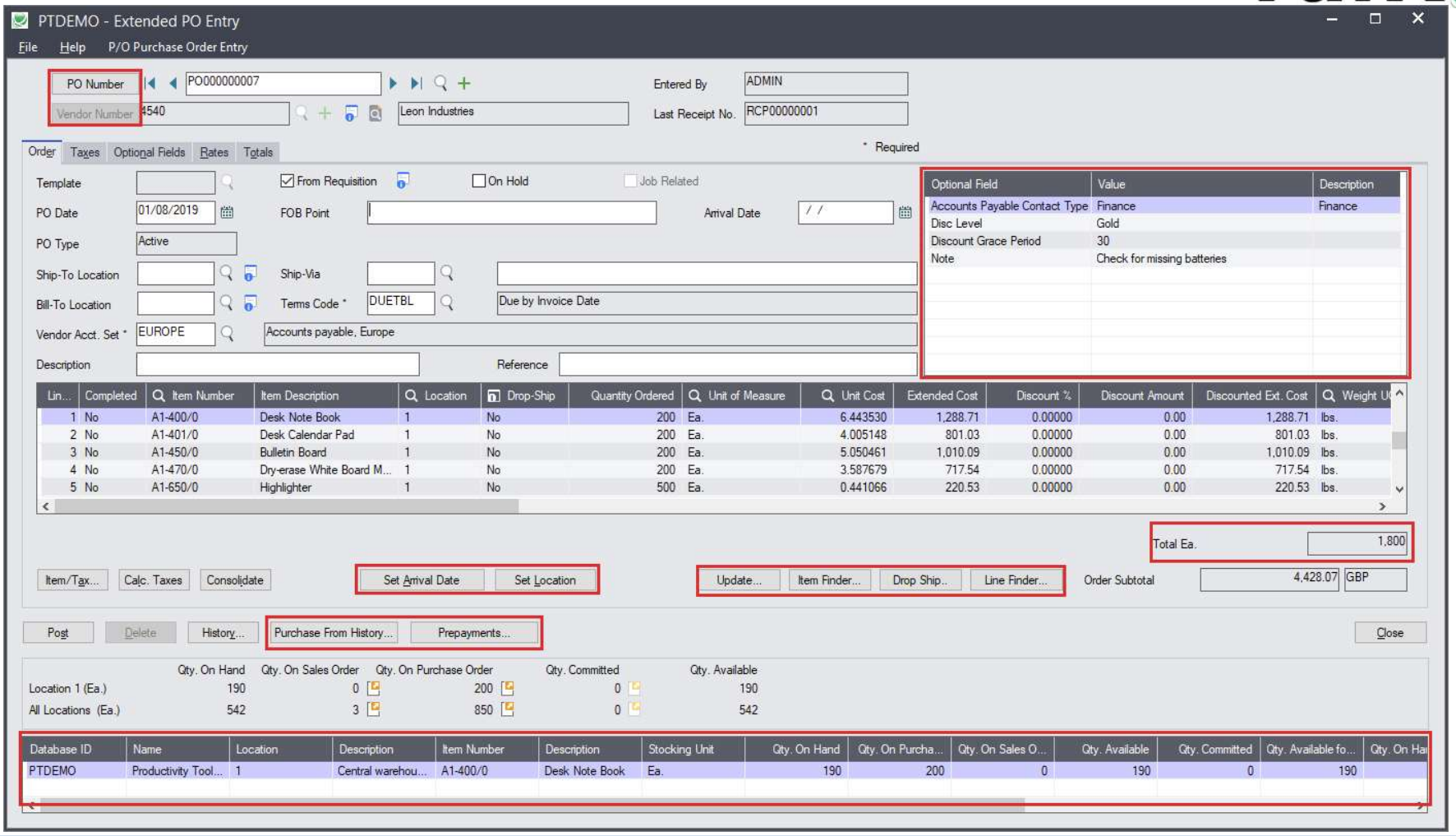
O/E Benefit Summary

- Extended Order Entry (Shipment Entry, Invoice Entry, DR/CR Entry)
  - SmartFinder, Visibility, Flexibility
- Ship Orders, Invoice Shipments, Update Orders, Update Shipments
  - Hundreds of operations at a time with complete logging
- Delete Orders, Delete Quotes, Complete Orders
  - Maintain accurate inventory data
- Create O/E Credit Notes – Reverse an order
- Extended Ship-Via Codes – Screen Integration
- Sales History Inquiry – Data Visibility
- Shipment Picking Slips, Email Packing Slips
  - Convenience, Flexibility

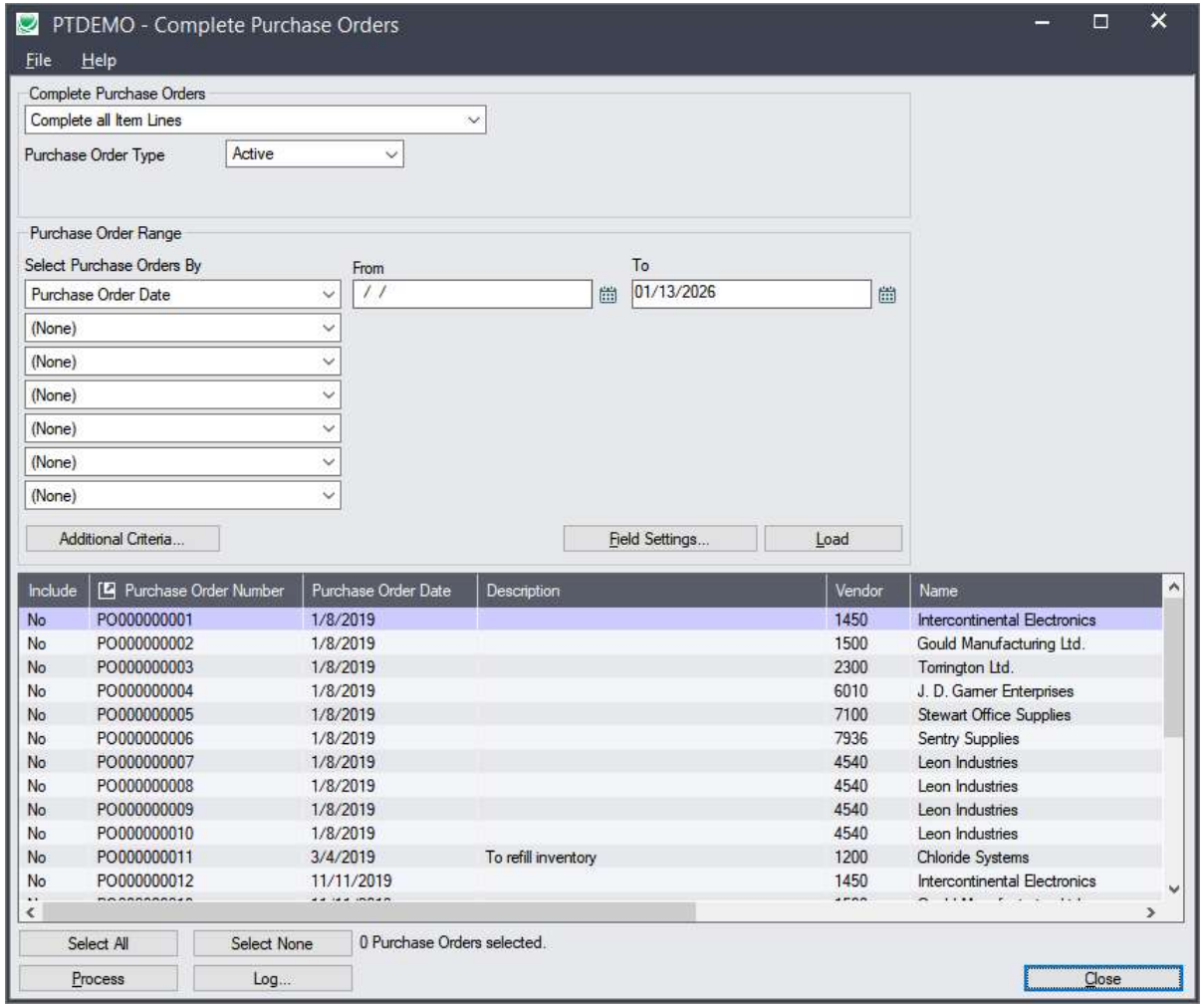
8 Purchase Order Programs

- Extended PO Entry
- Extended PO Receipt Entry
- Extended PO Invoice Entry
- Stock Reorder
- Update Purchase Orders
- Delete Purchase Orders
- Complete Purchase Orders
- Complete Zero Receipts

Extended PO Entry



Complete Purchase Orders



P/O Benefit Summary

- Extended PO Entry (Receipt Entry, Invoice Entry
  - SmartFinder, Visibility, Flexibility
- Update Purchase Orders
  - Hundreds of operations at a time with complete logging
- Delete Purchase Orders, Complete Purchase Orders
  - Maintain accurate inventory data
- Complete Zero Receipts
  - Visibility (Legacy Use)
- Stock Reorder
  - Flexibility

Future Webinars

TaiRox

Sage 300 Database Performance Improvement	Discover how **TaiRox** helps speed up Sage 300 with faster database utilities, smarter data management, and reduced maintenance time.
Multi-company data maintenance	Managing master data across multiple Sage 300 companies can be complex. Learn how **TaiRox** simplifies and standardizes multi-company data maintenance.