Customer Backorders

TaiRox 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.

Running Customer Backorders

The Customer Backorders icon appears under **TaiRox Productivity Tools > Order Entry Tools** on the Sage 300 desktop and can be copied to other menu locations.

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General Ledger Tools Inventory Control Tools Multi-Company Tools	Update Orders Update Shipments Delete Orders Delete Quotes C	Complete Orders	Create O/E Credit Notes	
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The Customer Backorders screen (below) lets you search for customer orders with backordered items by specifying the customer number and a range of order dates.

Click the Customer Number button (outlined in red, below) to display the SmartFinder for looking up customers. (The program displays the previously used customer number.)

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E Item Description	Kit/BOM Number Price List I	Location Original Quantity Ord Qu	antity Shipped-to-date Quantity Backordered

Looking Up Orders with Backordered Items

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Order Range Customer Number	Mr. Ronald Black		
Order Date Erom 2023-01-01	To 9999-12-31		

To look up orders with backordered items:

• Enter the customer number.

Note that the program defaults to the customer number from the last backorder lookup.

- Click the Customer Number button to look up the customer number with the SmartFinder. (See below.)
- Specify the range of order dates that you want to search.
- Click the Load button to display any orders for the customer with backordered items.

The program displays all orders with backordered items for the customer within the range of order dates.

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- Highlight an order in the top grid to view the backordered item details in the bottom grid.
- Double-click the order number or click the Order Number column heading to drill down to the order using the Extended Order Entry program.
- Double-click the item number in the bottom grid or click the Item column heading to drill down to the item details using the Extended Inventory Items program.

Using the SmartFinder to Look Up Customer Numbers

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Order Range Customer Number 1200 Q From Order Date			

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Active Customers	Only										
Customer Number	,	Status		Customer Na	me	Short Name	Address Line 1		City		State/Pr
1200		Active		Mr. Ronald B	lack	BLACK	2820 Wabash Road		Los Angeles		CA
1400		Active		Coastal Elect	ric Company	COAST	586 Tanner Road		Toronto		Ontario
1970		Active		Mr. Ronald E	nglish	ENGLI	2375 Hudson Avenue		Fairbanks		AK
7200		Active		CanAm Indus	tries	CANAM	1898 King George Str	eet	Toronto		Ontario
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Customer Number	Ship-T	o Location	Statu	s	Description	🖪 Address Lin.	Address Line 2	Add	ress Line 3	Addr	ress Line 4
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To look up account numbers for customers:

- Click the Customer Number button to open the SmartFinder for looking up customer account numbers.
- Enter part of a name or address (or contact phone or email address) and click the Find button.

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Search ron						Find	
Active Customers Only	/						
Customer Number	Status	Customer Name	Short Name	🖃 Address Line 1	City		State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles		CA
1400	Active	Coastal Electric Company	COAST	586 Tanner Road	Toronto		Ontario
1970	Active	Mr. Ronald English	ENGLI	2375 Hudson Avenue	Fairbanks		AK
7200	Active	CanAm Industries	CANAM	1898 King George Street	Toronto		Ontario

In this example:

- We entered "ron" in the Search field and pressed the Enter key to search for Ronald Black.
- The program got 4 results, 2 with "Ronald" in the Customer Number field, and 2 with "Toronto" in the city field.
- You can add to the search string in this case by adding "bl" to narrow down the search.

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Search ron bl						Find	
Active Customers Only							
Customer Number	Status	Customer Name	Short Name	🖪 Address Line 1	City		State/Pr
1200	Active	Mr. Ronald Black	BLACK	2820 Wabash Road	Los Angeles		CA

• Double-click the customer to select it and return to the Customer Backorders form.

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Order Range Customer Number] 1200 Q	Mr. Ronald Black			
Order Date	From 2023-01-01	To 99999-12-31	Load		

Additional Notes about the Customer Number SmartFinder

- 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 "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 "<u>300</u> <u>Main</u> Street" as well as "123 <u>Main</u> Street, Suite <u>300</u>".
 - **Searching for a phone number?** Enter the phone number segments separated by blanks. Enter "451 8991" and the search will find "(<u>451</u>) 555-<u>8991</u>" as well as "(408) <u>451-8991</u>".

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.)
- o Addresses (e.g. the Bill-To addresses) are treated as a single field.
- You can filter to retrieve active customers only and active ship-to locations only.

Display:

- The top grid displays the customers matching the search criteria. Double-click to select a customer.
- The bottom grid displays the ship-to locations that match the search criteria.

Note that the ship-to locations *may not* be related to the customer records displayed in the top part of the screen. Ship-to locations appear *only* if they contain the search string.

- Click the Address column heading or double-click the address to launch Google Maps with the address. You can also check the locations of ship-to addresses.
- Double-click email addresses (such as the Contact E-mail) to create new emails.

