

# TaiRox™ Memo

## Sage 300: Enhance A/R Customers

**Summary:** TaiRox Productivity Tools includes a program, Extended Customers, that adds functionality to the Sage 300 A/R customer maintenance screen, while maximizing compatibility. Extended Customers:

- Enhances data entry with SmartFinders and ISO 3166 enforcement.
- Launches Collections, receivable and internet features from added buttons.
- Copies customers to multiple companies.

CPYLTD - Extended Customers

File Settings Help Extended Menu

Customer Number: 1200 \* Required

Customer Name: Mr. Ronald Black

Address Contact Processing Invoicing Optional Fields Statistics Activity Comments Communications

National Account No. Business Reg. No. Group Code \* RTL Retail Sales Group

☐ On Hold Last Maintained: 08/18/2010 ☐ Inactive

Short Name: BLACK Start Date: 01/01/2009 Territory: CA

Address: 2820 Wabash Road

City: Los Angeles Country: USA

State/Prov.: CA Telephone: (213) 555-0274

Zip/Postal Code: 90048 Fax: (213) 555-7234

Email Web Site

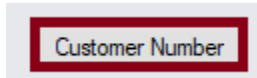
Save Delete Company... Copy Customers... Close

### Technical Details

Extended Customers launches the installed Sage 300 A/R Customer data-entry screen. It does not replace it. Buttons are overlaid on the Sage screen to add functionality. This technique maintains maximum possible compatibility across multiple versions of Sage 300, TaiRox, and third-party products.

### SmartFinders

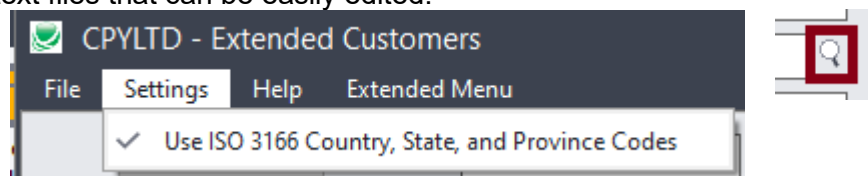
The customer number label is overlaid with a button. When pressed a SmartFinder is launched that provides internet-like searching capability, searching multiple fields in both the customer and ship-to tables at the same time. The results are shown in 2 grids: one for customer matches and one for ship-to matches. The searches are **fast**.



**Q:** Why ship-to tables? **A:** Many installations have regular customers with credit and many occasional customers who must pay cash. It is a common technique to track the cash customers as a single A/R customer with multiple ship-to addresses.

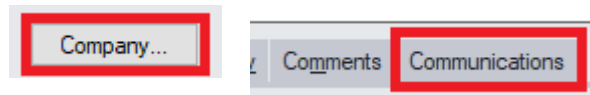
### ISO 3166 Enforcement

There are several software packages that track shipments. Many of these packages require the country, state and province fields conform, on entry, to ISO 3166 standards (2- and 3-character codes). The enforcement is turned on from the settings menu. Once turned on a finder will appear beside the Country and State / Prov fields on the customer screen. The allowed codes are stored in text files that can be easily edited.



### Collections Integration

The Address button launches Google Maps, supplying in the customer's address in the URL. A street-view is displayed in a browser window. The Email button launches the default email client on your computer, e.g. Outlook. The Web Site button launches your browser, feeding in the customer's Web Site field as the URL.



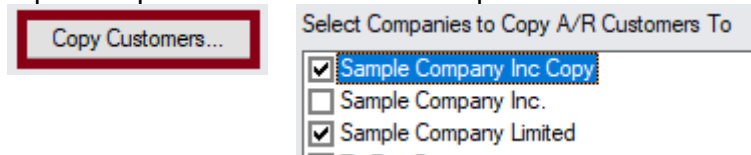
### Internet Integration

The Address button launches Google Maps, supplying in the customer's address in the URL. A street-view is displayed in a browser window. The Email button launches the default email client on your computer, e.g. Outlook. The Web Site button launches your browser, feeding in the customer's Web Site field as the URL.



### Copy Customers to Other Sage 300 Companies

Many installations involve multiple companies and service many of the same customers in more than one company. When a new customer is added or a customer address changes, copying the customer to multiple companies saves time and helps avoid errors.



### Extended Customer Inquiry Integration

Clicking on the Inquiry icon launches Extended Customer Inquiry. Just as Extended Customer Inquiry adds SmartFinders and other features to Sage's Customer screen, Extended Customers adds those features to Sage's Customer Inquiry screen.

