



Automate Recurring Entries User Guide

Important Notice

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Summary

TaiRox's Automate Recurring Entries program automates Sage 300 G/L, A/R and A/P recurring entry operations for any number of companies in a single operation. Any number of Sage 300 G/L, A/R and A/P recurring entry operations will be performed in each company, as set up using the standard Sage 300 application.

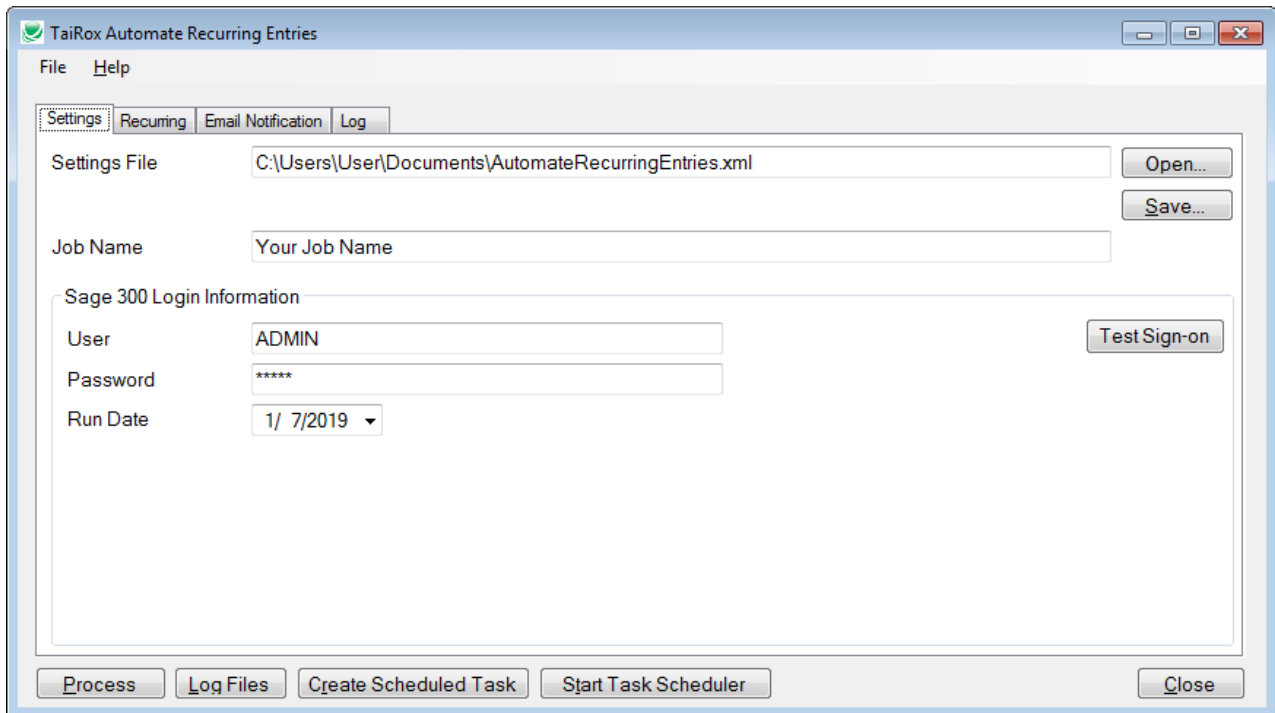
Overview

Automate Recurring Entries collects setup information in an XML file. Automate Recurring Entries can be run from its user interface or be set up to run as a Windows Scheduled Task, with the XML file name given as a command line parameter. Any number of Windows Scheduled Tasks can be set up to run at different times.

Automate Recurring Entries makes use of the core application's business logic, insuring proper multi-user operation.

Running Automate Recurring Entries

The Settings tab collects information related to a job, which would typically be run once per week or once per month.



The screenshot shows the 'TaiRox Automate Recurring Entries' application window. The title bar includes the application name and standard Windows window controls. The menu bar contains 'File' and 'Help'. Below the menu bar are four tabs: 'Settings' (selected), 'Recurring', 'Email Notification', and 'Log'. The main content area is divided into several sections:

- Settings File:** A text box containing 'C:\Users\User\Documents\AutomateRecurringEntries.xml' with 'Open...' and 'Save...' buttons to its right.
- Job Name:** A text box containing 'Your Job Name'.
- Sage 300 Login Information:** A section containing:
 - User:** A text box with 'ADMIN' and a 'Test Sign-on' button to its right.
 - Password:** A text box with '*****'.
 - Run Date:** A dropdown menu showing '1/ 7/2019'.

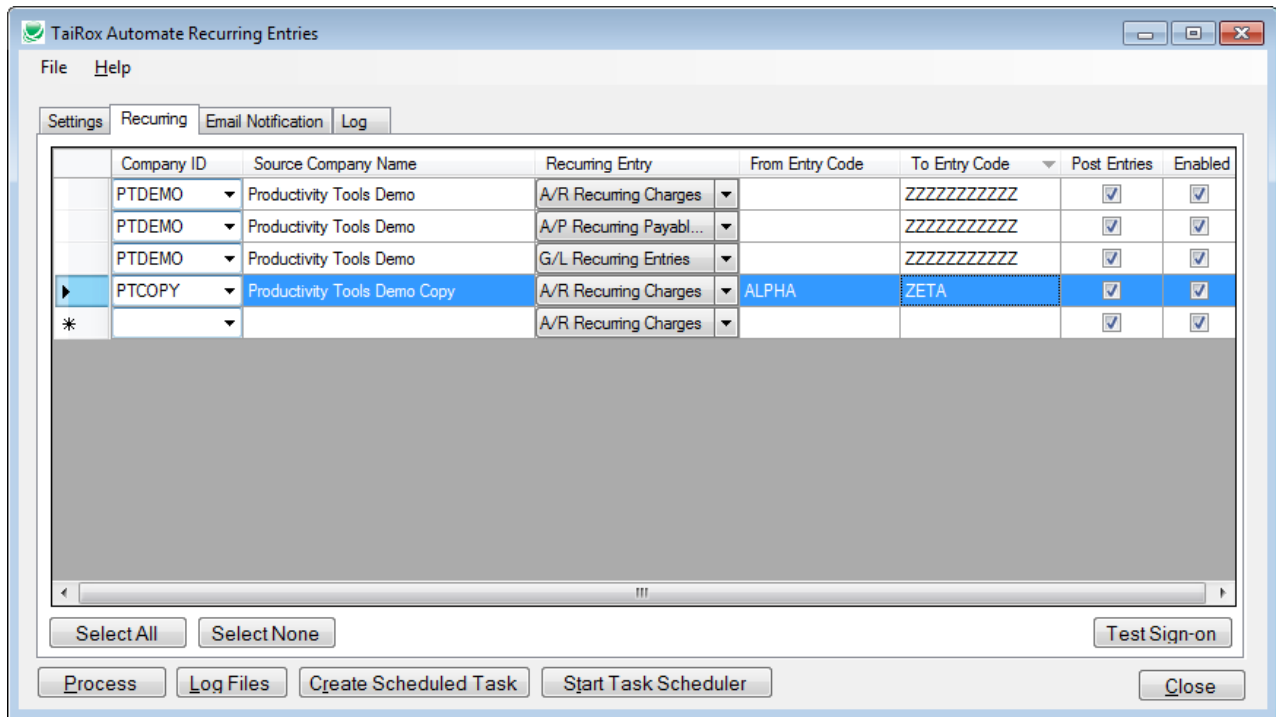
At the bottom of the window, there are five buttons: 'Process', 'Log Files', 'Create Scheduled Task', 'Start Task Scheduler', and 'Close'.

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Running Automate Recurring Entries (continued)

Settings File	All settings are stored here. Passwords are encrypted.
Job Name	This can be used in email notifications
User	The program will log in to the various companies with this user. Using the ADMIN user is a simple way to guarantee that there will be sufficient rights in all companies.
Password	This will be encrypted in the XML file.
Run Date*	The run date for the recurring entries.
*	The Run Date is not stored in the XML file. When running as a Windows Scheduled Task the run date is the system date.

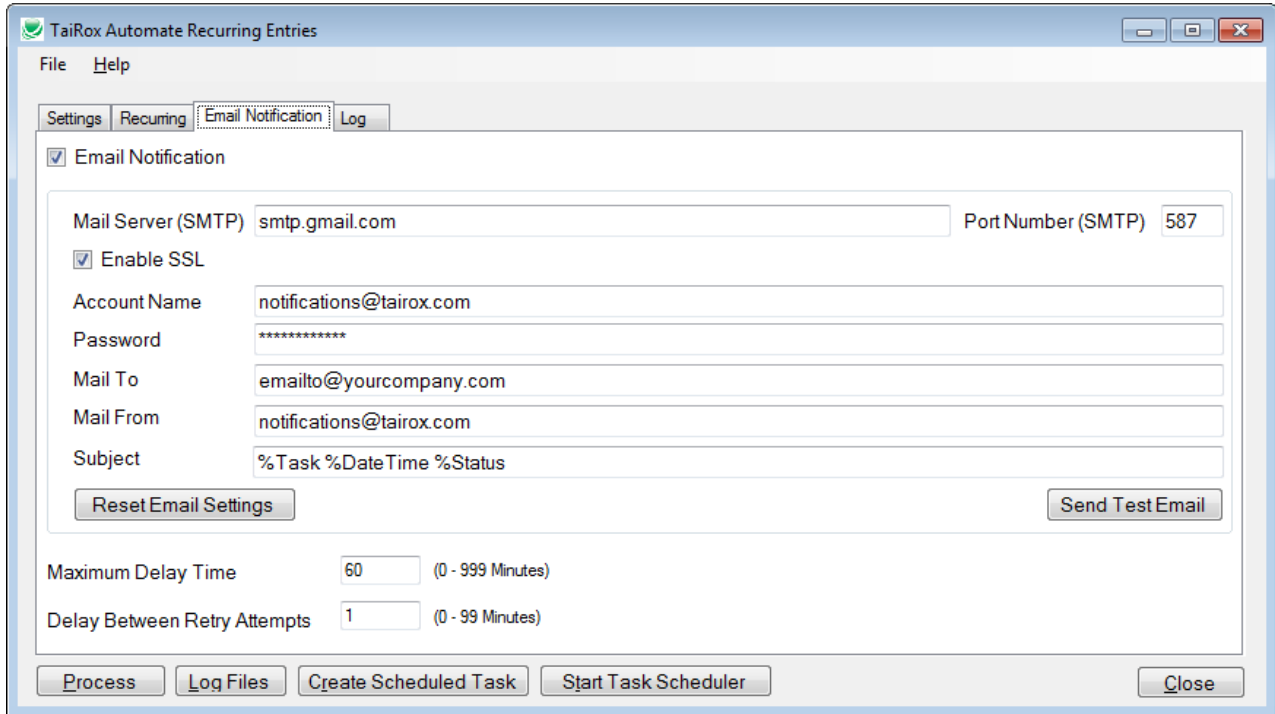
The Recurring tab displays a grid of the operations to be performed on a ranges of recurring entry codes in multiple companies.



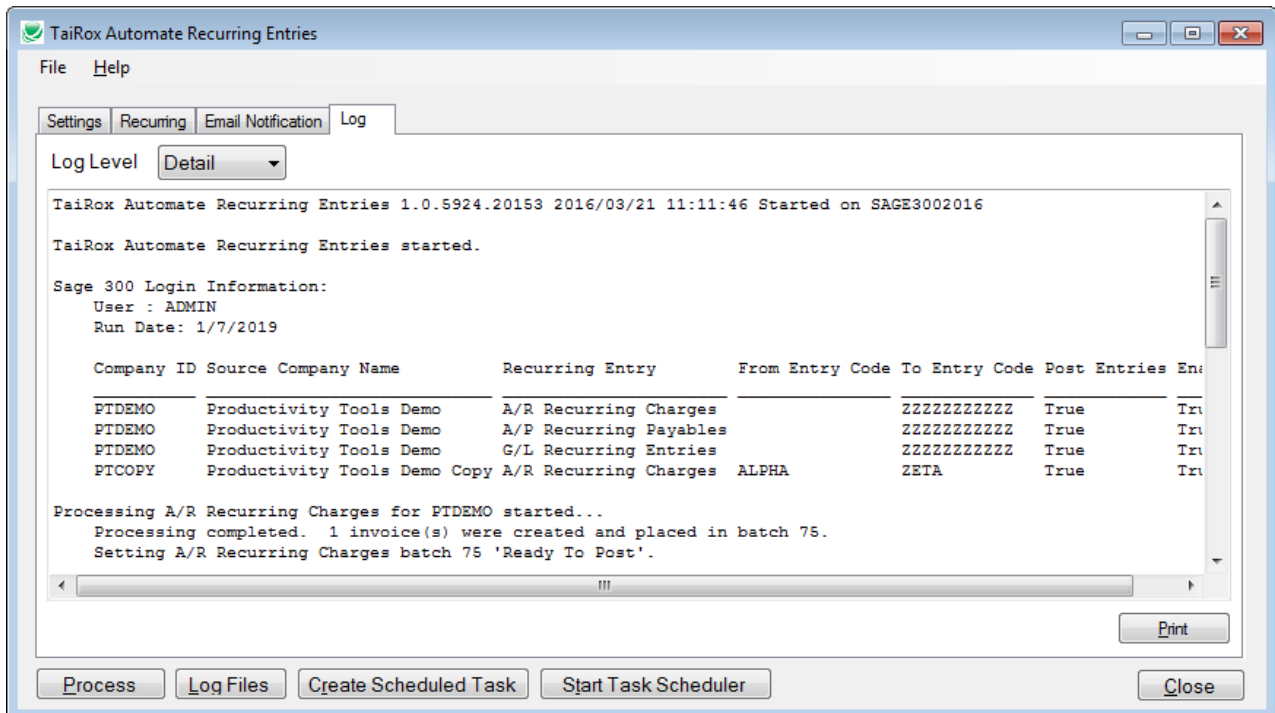
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Running Automate Recurring Entries (continued)

The Email Notification tab has the default values shown below with a TaiRox Gmail account that can be used. You may also use email settings that work in an email client on your machine.



The Log tab provides a display window that will be active once the Process button is pressed. Previous log files can be viewed by clicking on the Log Files button, which will launch Windows Explorer with the log file directory expanded.



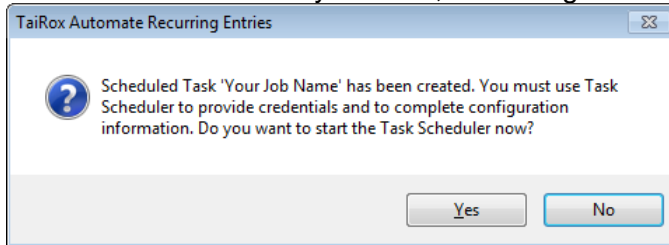
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Automate Recurring Entries - Create Scheduled Task

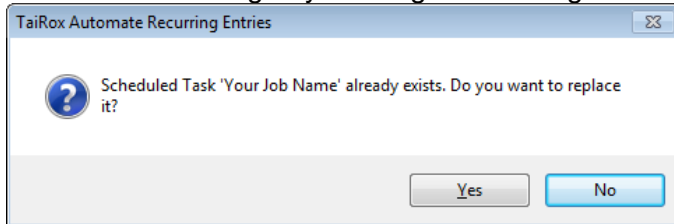
Automate Recurring Entries will create a basic task with that can be managed with the Task Scheduler. The task will have the Task Name on the Automate Recurring Entries Setting tab. We are providing this feature so that the Task Scheduler's Action tab will be populated with path to the Automate Recurring Entries program and also populated with the current XML path and name. These are the most common errors made by Sage 300 consultants not familiar with the Task Scheduler.

Important Notes: The task created by Automate Recurring Entries will not run on a regular basis until credentials have been provided. Other important options will need to be set up properly. Consult Task Scheduler documentation for important details beyond the scope of this document

If the task is successfully created, a message will appear:



If a task with the same name already exists, you will be warned. **Note** that replacing the task means not retaining any existing task settings:



The Task Scheduler varies in appearance from one version of Windows to another. Typically:

