

Extended Create New Year

Extended Create New Year extends the functionality of Sage 300 by creating a new year in multiple companies in one step.

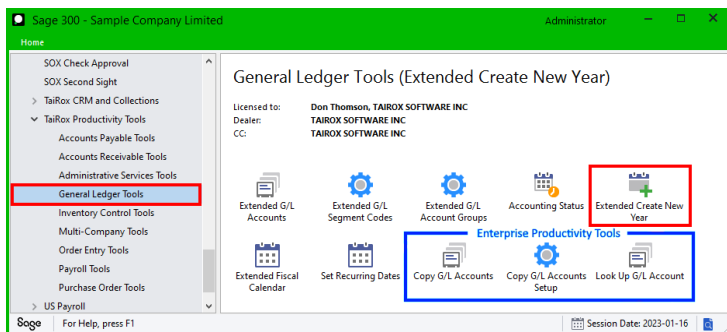
In controlled environments, this will shorten the work for a senior accounting resource.

Important Note: You must create a fiscal calendar for the new year for all selected companies prior to running Extended Create New Year.

Extended Create New Year is an “all or nothing” operation. Before processing any of the companies, they are all checked for the existence of a fiscal calendar for the specified year. ***If any of the companies does not have its fiscal calendar set up***, no companies will be processed.

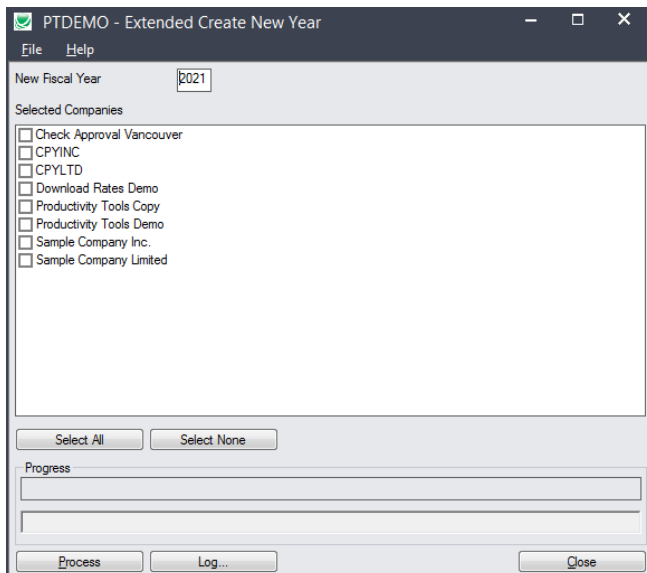
Using Extended Create New Year

The Extended Create New Year icon appears under **TaiRox Productivity Tools > General Ledger Tools** on the Sage 300 desktop and can be copied to other menu locations.

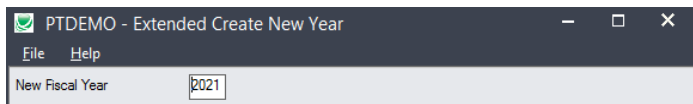


Enterprise Productivity Tools appear if you have an Enterprise license from TaiRox Software.

The Extended Create New Year window appears as follows:

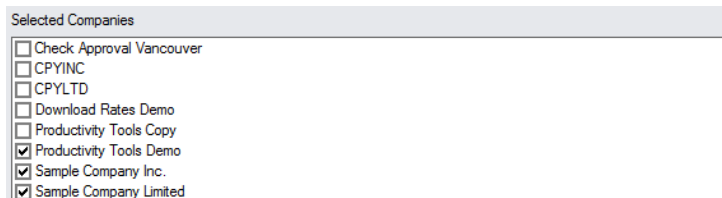


Specify the New Fiscal Year:



- The year defaults to the next fiscal year. Confirm that it is correct before proceeding.

Select Sage companies:

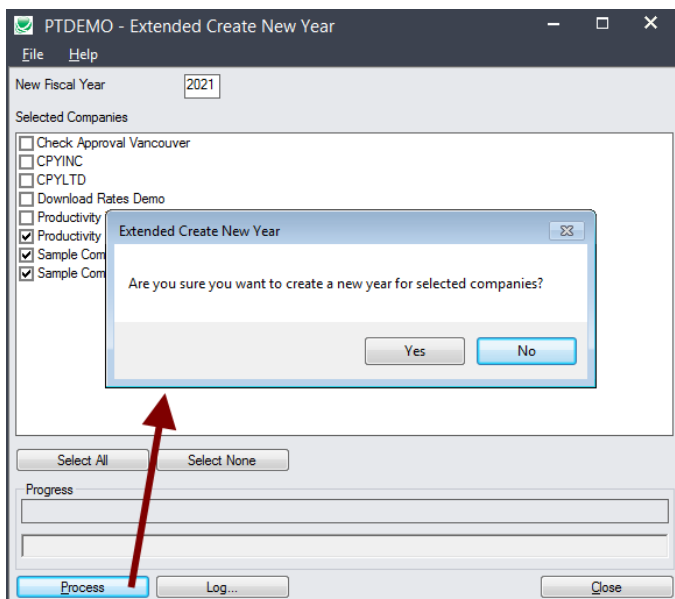


- Click the Select All and Select None buttons at the bottom of the form to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

Click the Process button to proceed:

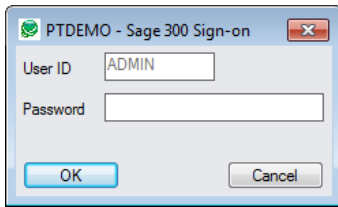


- Click the Process button to start the procedure. The program asks you to confirm that you want to continue.

Important Note: Extended Create New Year is an “all or nothing” operation. Before processing any of the companies, they are all checked for the existence of a fiscal calendar for the specified year. If any of the companies does not have its fiscal calendar set up, then no companies will be processed.

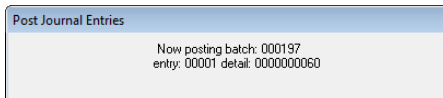
Enter the password for the Admin account User ID:

- Enter the password for the Admin User ID in the Sage 300 Sign-On window and click OK.

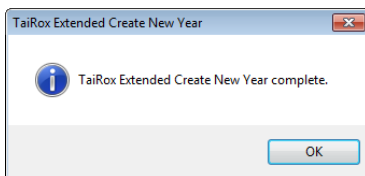


Note: The ADMIN password is used to ensure that you have sufficient permissions to create a new year in all of the target companies.

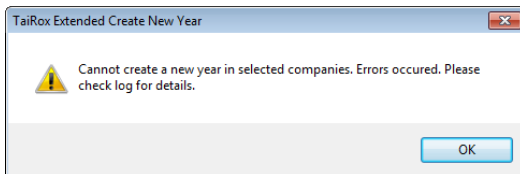
- A progress dialog will be displayed during the operation:



- A dialog signals the completion of the operation:



- If the fiscal calendar for the new year does not exist in some of the selected companies, the following error message will appear:



Click the Log button to confirm that the process was successful for all companies:

The following example shows errors because the new fiscal years have not been created in the target companies. The procedure could not be completed.

```

7/31/2020 12:12:55 PM Extended Create New Year started.
7/31/2020 12:12:55 PM
7/31/2020 12:12:55 PM Performed by user: ADMIN
7/31/2020 12:12:55 PM
7/31/2020 12:12:55 PM New Fiscal Year: 2021
7/31/2020 12:12:55 PM Selected Companies:
7/31/2020 12:12:55 PM     Productivity Tools Demo
7/31/2020 12:12:55 PM     Sample Company Inc.
7/31/2020 12:12:55 PM     Sample Company Limited
7/31/2020 12:12:55 PM
7/31/2020 12:12:55 PM Verifying new year can be created in selected companies started.
7/31/2020 12:12:55 PM Verifying create a new year for Productivity Tools Demo started
7/31/2020 12:12:55 PM     Logging in to Productivity Tools Demo...
7/31/2020 12:12:55 PM     Incorrect procedure. Fiscal year 2021 does not exist in Common
Services Fiscal Calendar.
7/31/2020 12:12:55 PM     Use TaiRox Productivity Tools Extended Fiscal Calendar to
create a new Fiscal Calendar for 2021.
7/31/2020 12:12:55 PM     Logging off of Productivity Tools Demo...
7/31/2020 12:12:55 PM Verifying create a new year for Productivity Tools Demo complete.
7/31/2020 12:12:55 PM Verifying create a new year for Sample Company Inc. started
7/31/2020 12:12:55 PM     Logging in to Sample Company Inc....
7/31/2020 12:12:55 PM     Logging off of Sample Company Inc....
7/31/2020 12:12:55 PM Verifying create a new year for Sample Company Inc. complete.
7/31/2020 12:12:55 PM Verifying create a new year for Sample Company Limited started

```

```
7/31/2020 12:12:55 PM      Logging in to Sample Company Limited...
7/31/2020 12:12:55 PM      Incorrect procedure. Fiscal year 2021 does not exist in Common
Services Fiscal Calendar.
7/31/2020 12:12:55 PM      Use TaiRox Productivity Tools Extended Fiscal Calendar to
create a new Fiscal Calendar for 2021.
7/31/2020 12:12:55 PM      Logging off of Sample Company Limited...
7/31/2020 12:12:55 PM      Verifying create a new year for Sample Company Limited complete.
7/31/2020 12:12:55 PM      Verifying new year can be created in selected companies complete.
7/31/2020 12:12:55 PM
7/31/2020 12:12:55 PM      Cannot create a new year in selected companies.
```

The Log lists:

- The user, the type of operation performed, and the range of accounts.
- Each company that was processed and whether the procedure was successful.