

# Extended Fiscal Calendar

Extended Fiscal Calendar is an enhanced replacement for the Sage Fiscal Calendar screen that lets you maintain a fiscal calendar across multiple Sage 300 companies.

The program operates from within an existing "source" company, and lets you copy the fiscal calendar from the source company to any number of target companies.

Applications and companies can be filtered and "cherry-picked", and the program includes sophisticated error-checking to protect against inconsistencies while copying.

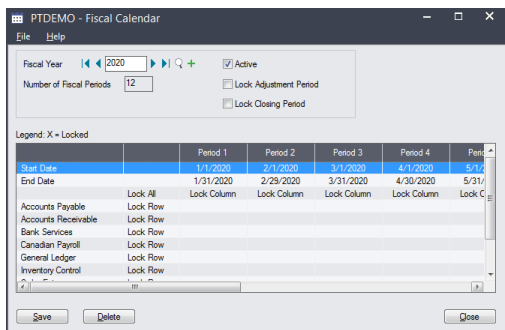
When the copy operation is complete, you can view and print a full log of changes.

## Extended Fiscal Calendar lets you:

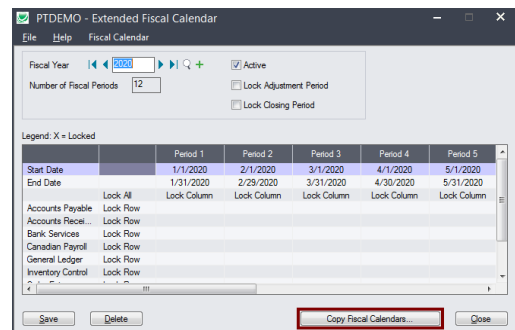
- Maintain fiscal calendars across multiple Sage 300 companies using the Copy Fiscal Calendars functionality.
  - Specify the Sage 300 companies and applications for copying fiscal calendars.
  - Select or de-select companies on an individual basis.
  - Select or de-select applications to lock or unlock fiscal periods by application.
  - If updating calendars only, choose whether to update locked or unlocked fiscal periods only.
  - Display a full log of updated fiscal calendars.

The following screens show the additional Copy Fiscal Calendars button on the Extended Fiscal Calendar screen:

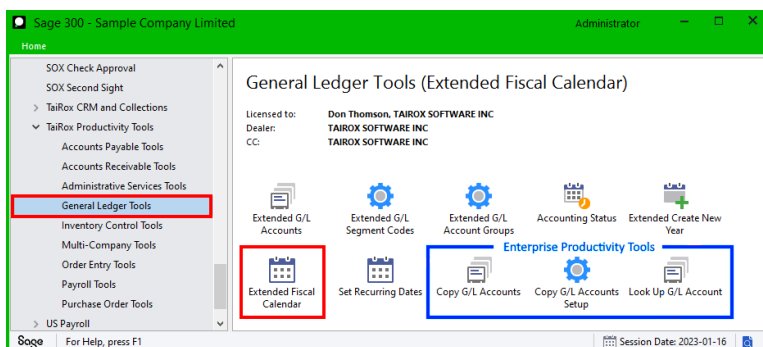
Sage Fiscal Calendar screen



TaiRox Extended Fiscal Calendar screen



The Extended Fiscal Calendar 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.*

## Copy Fiscal Calendar to other Sage 300 companies

Extended Fiscal Calendar copies fiscal calendars from within an existing "source" company to multiple target Sage 300 companies.

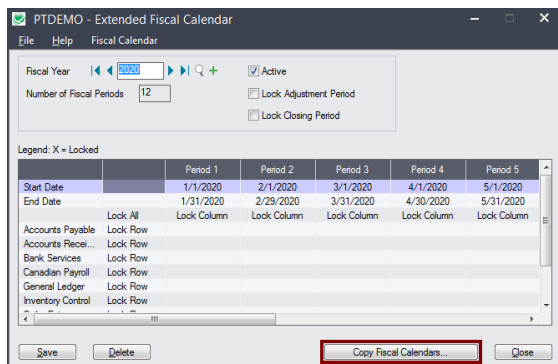
### IMPORTANT:

You must enter a User ID and Password to copy G/L fiscal calendar information. Make sure the User ID has sufficient rights to complete the operation in the target companies.

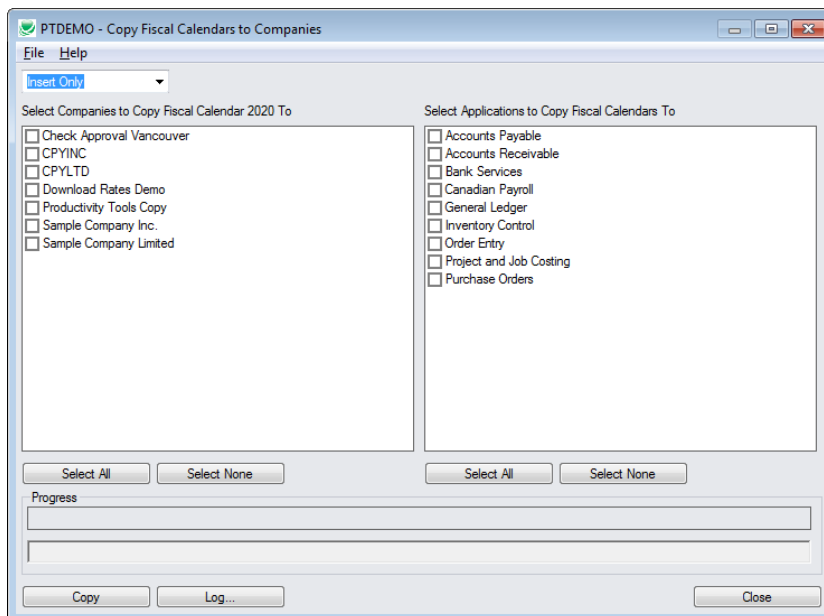
If you are inserting new fiscal calendars into other companies, check that a current backup exists for the databases being affected.

### To proceed:

- Open the Sage 300 company with the fiscal calendar that you want to copy and open Extended Fiscal Calendar.



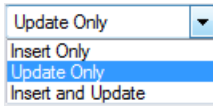
- Select the Fiscal Year on the Extended Fiscal Calendar screen.
- Click the Copy Fiscal Calendars button.



**Select whether to insert new codes or update existing ones in target companies:**

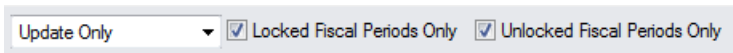
**Important:** Before proceeding, decide which operation is to be performed – insert or update calendars in the target companies. This is controlled by the drop-down at the top of the window.

For example, choose Update Only to update fiscal calendars.



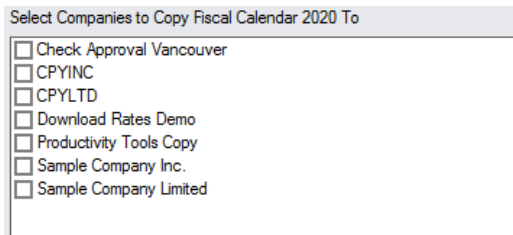
- Choose whether to insert, insert and update, or just update fiscal calendars.
  - Insert Only will add calendars if the calendar does not already exist in target companies. It will not change existing calendars.
  - Update Only will only update calendars in target companies that already exist – but will not add new ones.
    - If updating codes only, you can also choose whether to update locked or unlocked fiscal periods only.
  - Insert and Update will perform both of these operations.

**Specify which fiscal periods to update:**



- If you choose Update Only, you can choose to update locked or unlocked fiscal periods.

**Select target Sage companies:**



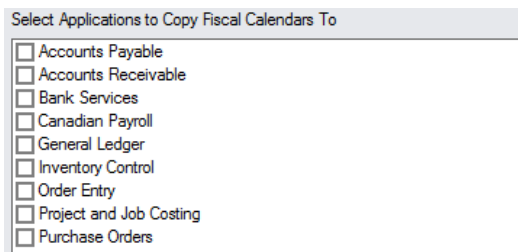
- Click the Select All and Select None buttons at the bottom of the form to include all or none of the target companies.



- Click the checkboxes to complete your company selections.

**Select applications to copy the fiscal periods to:**

These selections let you individually lock or unlock fiscal periods for each sage 300 application.

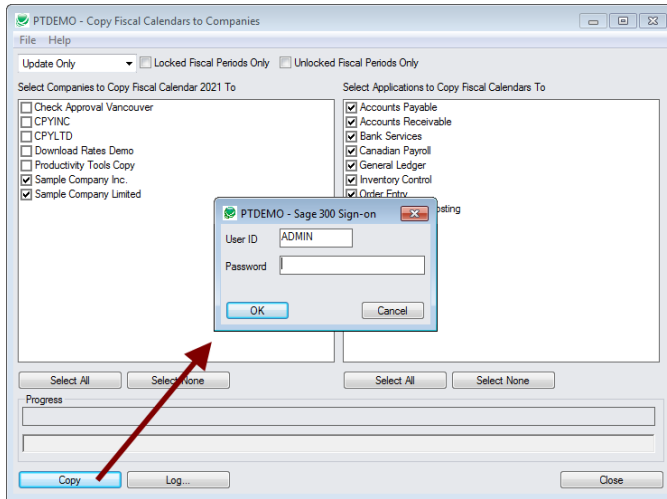


- Click the Select All and Select None buttons at the bottom of the form to include/exclude fiscal period settings for individual applications.



- Click the checkboxes to complete your applications selections.

**Click the Copy button to copy fiscal calendars:**



- Click the Copy button to start the copy procedure.
- Enter your User ID and password in the Sage 300 Sign-On window and click OK.
 

**Note:** You MUST have sufficient permissions to update fiscal calendars in the target companies for copying to proceed.
- The program will copy the G/L fiscal calendar information to the target companies.
- If no changes are required for a selected fiscal calendar, no update will be performed – so the audit stamp will be preserved.
- If you cancel the operation during the copying process, you must check the log to see which procedures were completed and assess how you want to continue.

**Click the Log button to confirm which Fiscal Calendar were processed:**

```

7/31/2020 3:20:59 PM Copy Fiscal Calendars to Companies started.
7/31/2020 3:20:59 PM
7/31/2020 3:20:59 PM Logged in user: ADMIN
7/31/2020 3:20:59 PM Performed by user: MORGAN
7/31/2020 3:20:59 PM
7/31/2020 3:20:59 PM Update Only
7/31/2020 3:20:59 PM Fiscal Year: 2021
7/31/2020 3:20:59 PM Locked Fiscal Periods Only: No
7/31/2020 3:20:59 PM Unlocked Fiscal Periods Only: No
7/31/2020 3:20:59 PM Copy Fiscal Calendars to Companies: Sample Company Inc.
7/31/2020 3:20:59 PM                                     Sample Company Limited
7/31/2020 3:20:59 PM
7/31/2020 3:20:59 PM Copy Fiscal Calendars to Applications: Accounts Payable
7/31/2020 3:20:59 PM                                                         Accounts Receivable
7/31/2020 3:20:59 PM                                                         Bank Services
7/31/2020 3:20:59 PM                                                         Canadian Payroll
7/31/2020 3:20:59 PM                                                         General Ledger
7/31/2020 3:20:59 PM                                                         Inventory Control
7/31/2020 3:20:59 PM                                                         Order Entry
7/31/2020 3:20:59 PM                                                         Project and Job Costing
7/31/2020 3:20:59 PM                                                         Purchase Orders
7/31/2020 3:20:59 PM
    
```

```

7/31/2020 3:20:59 PM Copying fiscal calendars from Productivity Tools Demo to Sample Company
Inc. started.
7/31/2020 3:20:59 PM      Logging in to Sample Company Inc....
7/31/2020 3:20:59 PM      Updating fiscal calendar 2021...
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Accounts Payable
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Accounts Receivable
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Bank Services
7/31/2020 3:20:59 PM      Fiscal period information for Canadian Payroll not copied
because it is not active in Sample Company Inc.
7/31/2020 3:20:59 PM      Copying fiscal calendar information for General Ledger
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Inventory Control
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Order Entry
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Project and Job
Costing
7/31/2020 3:20:59 PM      Copying fiscal calendar information for Purchase Orders
7/31/2020 3:20:59 PM      Fiscal calendar updated.
7/31/2020 3:20:59 PM      Logging off of Sample Company Inc....
7/31/2020 3:20:59 PM
7/31/2020 3:20:59 PM      There was 1 fiscal calendar updated.
7/31/2020 3:20:59 PM Copying fiscal calendars from Productivity Tools Demo to Sample Company
Inc. complete.
7/31/2020 3:20:59 PM
7/31/2020 3:20:59 PM Copying fiscal calendars from Productivity Tools Demo to Sample Company
Limited started.
7/31/2020 3:20:59 PM      Logging in to Sample Company Limited...
7/31/2020 3:21:00 PM      Updating fiscal calendar 2021...
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Accounts Payable
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Accounts Receivable
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Bank Services
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Canadian Payroll
7/31/2020 3:21:00 PM      Copying fiscal calendar information for General Ledger
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Inventory Control
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Order Entry
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Project and Job
Costing
7/31/2020 3:21:00 PM      Copying fiscal calendar information for Purchase Orders
7/31/2020 3:21:00 PM      Fiscal calendar updated.
7/31/2020 3:21:00 PM      Logging off of Sample Company Limited...
7/31/2020 3:21:00 PM
7/31/2020 3:21:00 PM      There was 1 fiscal calendar updated.
7/31/2020 3:21:00 PM Copying fiscal calendars from Productivity Tools Demo to Sample Company
Limited complete.
7/31/2020 3:21:00 PM
7/31/2020 3:21:00 PM
7/31/2020 3:21:00 PM Copy Fiscal Calendars to Companies complete.
7/31/2020 3:21:00 PM
=====
    
```

The Log lists:

- The user, the type of operation performed, and the companies and applications for copying fiscal calendars.
- Each fiscal calendar that was processed, whether the fiscal calendars were updated or inserted, which applications were updated, and whether any errors were encountered.