

TaiRox Productivity Tools User Guide

Summary - Set Recurring Dates

Set Recurring Dates provides a means of changing the Last Run Date for G/L Recurring Entries, something not possible using Sage 300. In the event that the Last Run Date is inadvertently set (e.g. 2021 is typed when 2012 is intended), the only way to set the Last Run Date correctly has been to edit database tables directly.

Overview - Set Recurring Dates

Set Recurring Dates selects G/L Recurring Entries from a range of Recurring Entry Codes and a range of Last Run Dates. The Last Run Date criteria may be useful to track down values that are incorrect. Once the selected items are displayed, their Last Run Dates can be edited in a grid. Pressing the Process button will update the recurring entry data for the selected records.

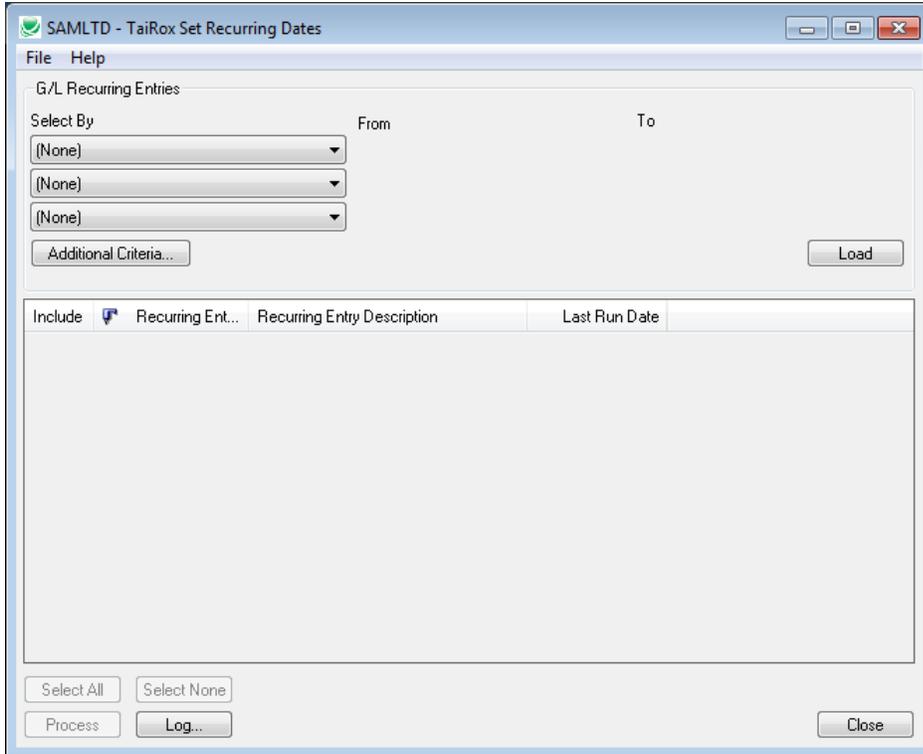
Running Set Recurring Dates

Once the TaiRox Productivity Tools are installed and activated, the Set Recurring Dates icon will be shown from the TaiRox Productivity Tools menu on the Sage 300 Desktop (and can be copied to other menu locations).

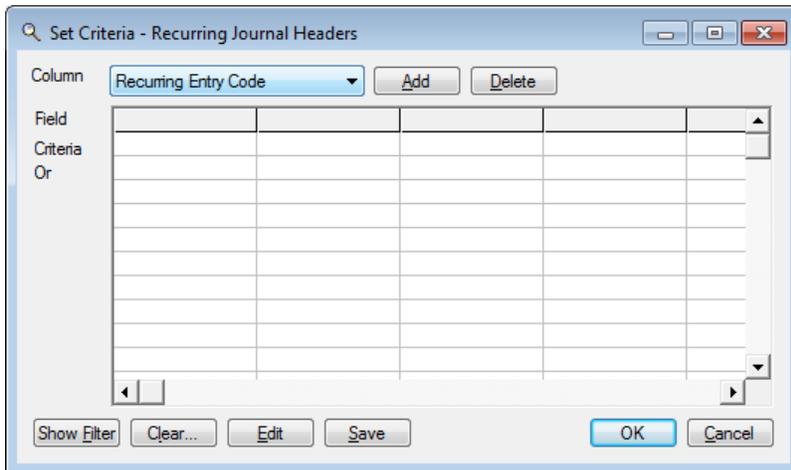
TaiRox Productivity Tools User Guide

Running Set Recurring Dates (continued)

Launching the program will present a screen that allows you to the G/L Recurring Entries to be updated using various ranges, in a style identical to that used by core modules:



Additional criteria can be used, again in the core-module style:



TaiRox Productivity Tools User Guide

Running Set Recurring Dates (continued)

When the Load button is pressed Recurring Entries that match the selection criteria will be displayed, with full drill-down support:

The screenshot shows a window titled "SAMLTD - TaiRox Set Recurring Dates". It has a menu bar with "File" and "Help". Below the menu bar is a section for search criteria:

- "G/L Recurring Entries" label.
- "Select By" dropdown menu with options: "Recurring Entry Code", "Last Run Date", and "(None)".
- "From" text input field with a search icon.
- "To" text input field with a search icon, containing the date "12/31/9999".
- "Additional Criteria..." button.
- "Load" button.

Below the search criteria is a table with the following columns: "Include", "Recurring Ent...", "Recurring Entry Description", and "Last Run Date".

Include	Recurring Ent...	Recurring Entry Description	Last Run Date
Yes	BANKCHARGE	Monthly Bank Charge	
Yes	BANKCHARGE2	Month bank charge - CCB	
Yes	PHONE-JACK	Phone-Jack	
Yes	RENT-WS	Rent - Warehouse	

At the bottom of the dialog, there are buttons for "Select All", "Select None", "Process", "Log...", and "Close". A status bar indicates "4 Recurring Journal Headers selected."

The records can be selected / de-selected on an individual basis (“cherry-picked”).

Edit the Last Run Date column, entering the date you want to set for that entry.

When the Process button is clicked, the Last Run Date will be updated for the selected records.