



# Automate Recurring Entries

## User Guide

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**Important Notice**

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# Automate Recurring Entries

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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. You set up recurring entries using the standard Sage 300 application.

Automate Recurring Entries can be run from its user interface or it can run as a Windows Scheduled Task, with an XML file name given as a command line parameter.

You can set up any number of Windows Scheduled Tasks to run at different times.

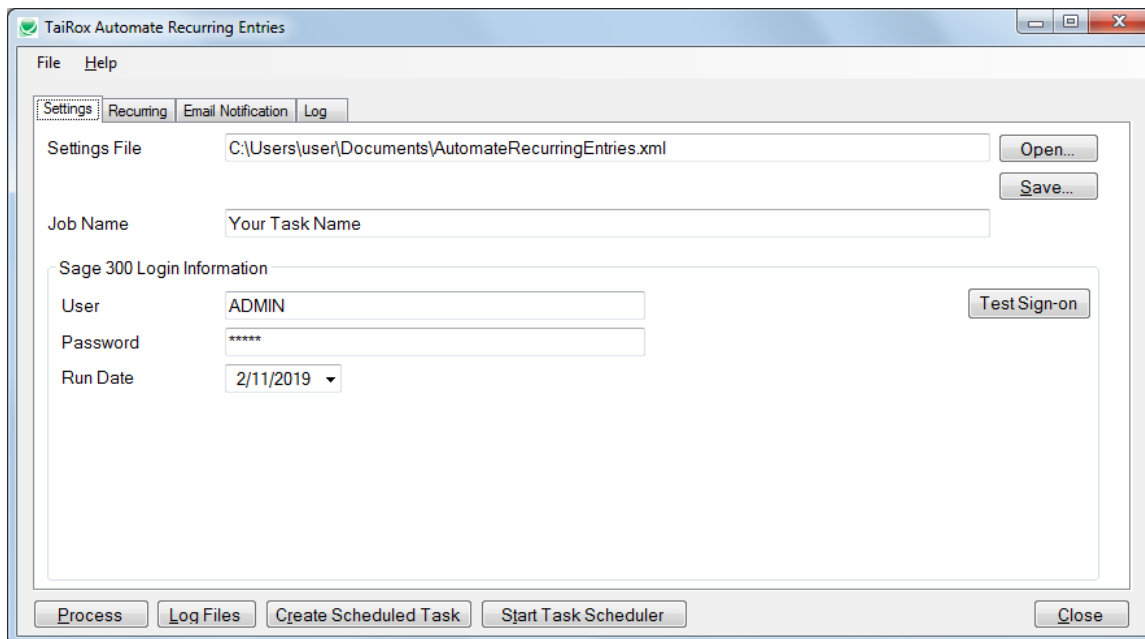
Automate Recurring Entries uses Sage 300 core business logic, insuring proper multi-user operation.

## Running Automate Recurring Entries

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### The Settings Tab

The Settings tab includes the company, authentication, settings file name, and job name for the recurring entries job, which would typically be run once a week or once a month.



Click the Process button to run the recurring entries job immediately using the displayed settings.

### Complete the fields on the Settings tab as follows:

**Settings File** – All the settings from all tabs on the form are stored here. All password information is encrypted in the XML file. Any number of tasks can be set up, stored in different XML files and run as separate Windows Scheduled Tasks.

**Job Name** – This name can appear in the subject line of 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.

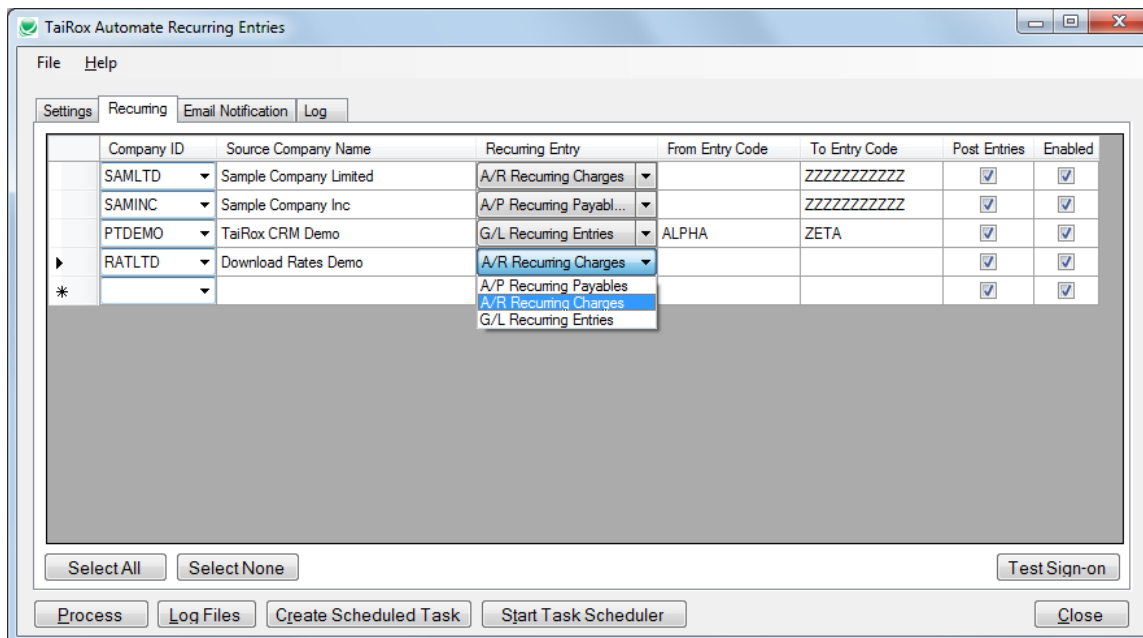
**Password** – This will be encrypted in the XML file.

**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

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



Choose the company ID, the application, the range of recurring entry codes, and whether you want to post transactions.

The Enabled checkbox lets you set up the entry without running it.

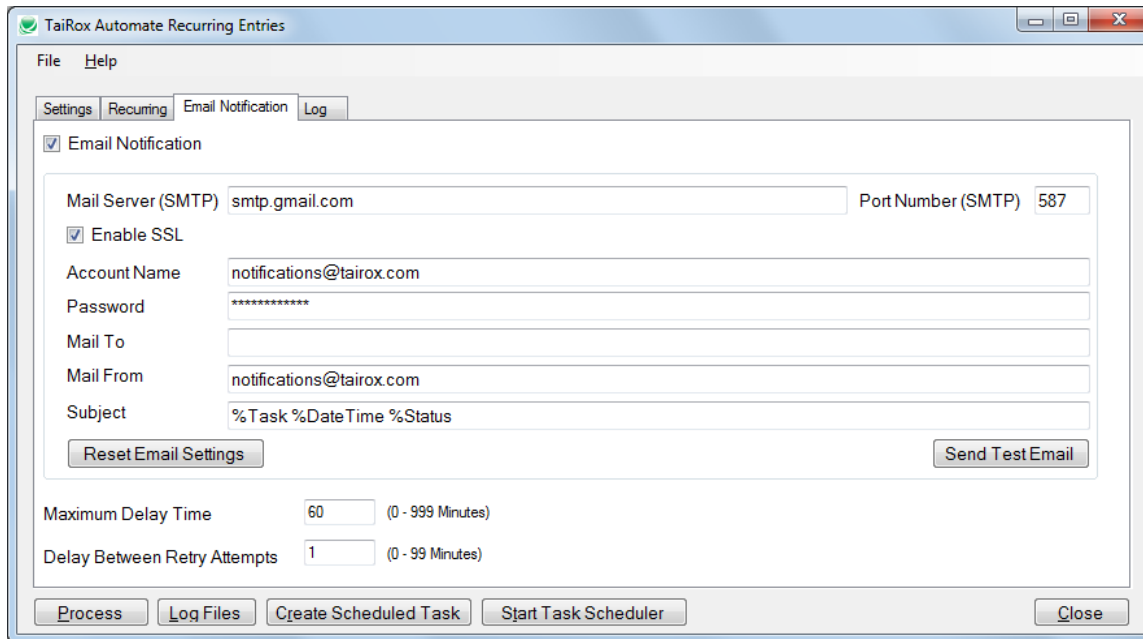
## The Email Notification Tab

The Email Notification tab contains the settings for email notification. You can turn email notifications on or off.

Select the Email Notification checkbox, enter your server settings and email account ID, and click the Send Test Email button to check that the settings work.

The settings shown below use notifications@tairox.com, a Gmail account for sending out notifications. (Note that this is not a publicly available email account.)

You will need proper credentials that work from the computer running Automate Recurring Entries.



If using the default settings, you just have to add a “Mail To” address.

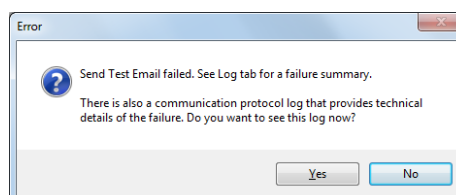
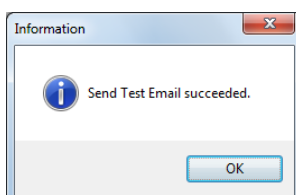
**Mail To:** You can include any number of email addresses, separated by commas or semi-colons.

**Subject:** Use any subject line you want.

The codes %Task, %DateTime and %Status will be replaced respectively by the Task Name on the Server Tab, the Date and Time that the job completes and the Status of the job (SUCCESS or FAILURE). For compatibility reasons %Job will be treated the same as %Task.

The Reset Email Settings button will return the settings shown here, with the appropriate password for notifications@tairox.com.

**Send Test email:** Click this button to test email settings. One of the following dialogs can appear depending on whether the test was successful. If the test fails, check the log file by clicking the Yes button in the error message.



**Note regarding “Enable SSL” if unsupported by the SMTP server**

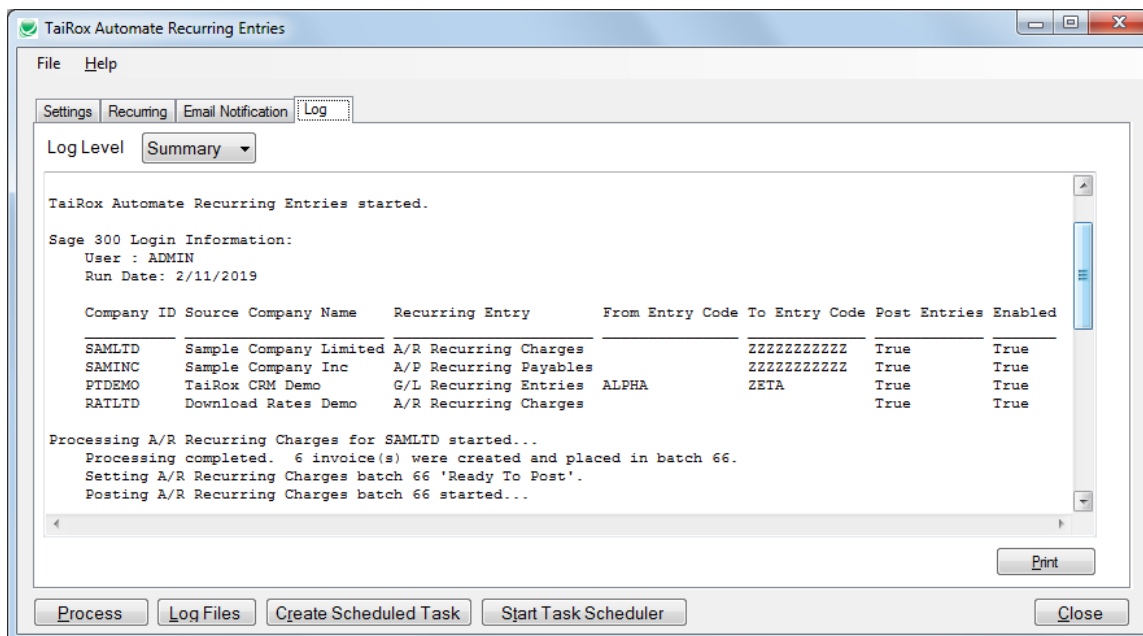
If you select the “Enable SSL” checkbox, the program will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. The program will display an error message if the secure test fails, but the insecure test is successful.

If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The "Enable SSL" checkbox has different meanings for different email sending mechanisms, particularly older ones.)
- You should uncheck “Enable SSL” to send emails without SSL protection.

## The Log Tab

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.



# Creating and Automating a 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 provide this feature to ensure that the Task Scheduler's Action tab will have the correct path to the Automate Recurring Entries program and have the correct XML path and name. These are the most common errors made by Sage 300 consultants not familiar with the Task Scheduler.

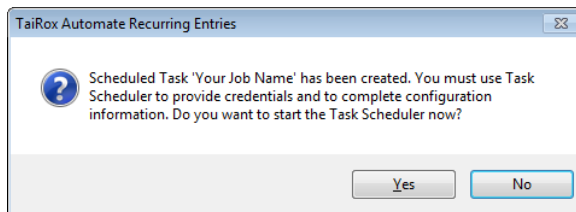
**Important:** You MUST edit the task created by Automate Recurring Entries in the Windows Task Scheduler to provide credentials for the task. Otherwise, it will not run. Other important options also need to be set up properly.

Consult the Windows Task Scheduler documentation for important details beyond the scope of this document.

## Using the Create Scheduled Task button

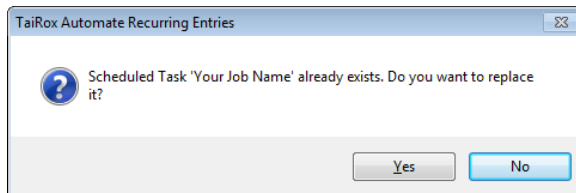
Fill in the fields for Automate Recurring Entries and run it manually before creating the scheduled task to ensure that the XML file is properly set up.

- **Click the Create Scheduled Task button to create the task.** The following message will appear:



- Click Yes to start the Windows Task Scheduler.

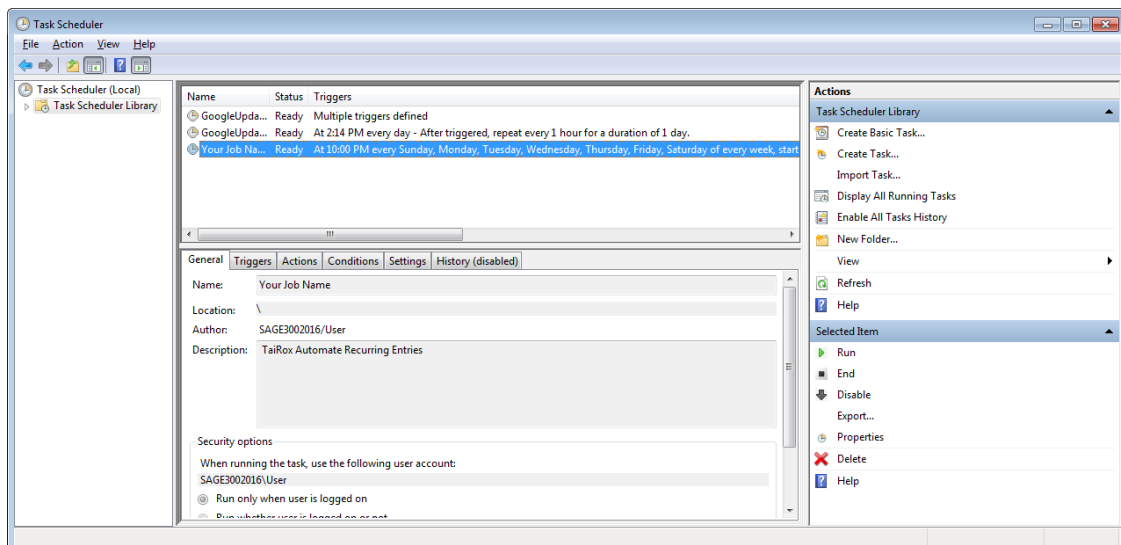
If a task with the same name already exists, the program will warn you that the task exists.



**Note:** If you replace the task, you will lose the existing (i.e. previous) task settings.

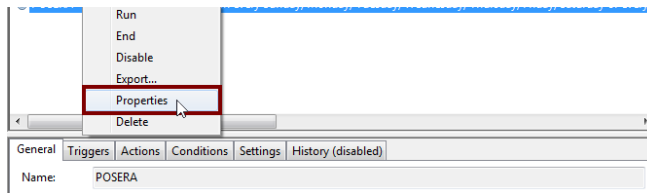
- **Click the Start Task Scheduler button to open the Task Scheduler window.**

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



- Click the “Task Scheduler Library” folder in the left panel, and then select the task you just created in the middle panel.
  - Right-click the task entry and select **Properties** to edit the task settings.

**You MUST edit the properties to add the task user account password.** When you save the properties, the program will ask you to provide the password for the task user.



If the task does not run properly after set up, the problem is usually that some authentication has failed.

#### Some hints:

- The scheduler requires a user and password. Create Scheduled Task created the task with a task user, but it did not add the task user’s password.

You must edit the task properties to specify the password (when you click Save).

You can also change the task user when you edit the task properties.
- An experienced Windows IT person should be able to solve any problems.
- Your error has occurred before – do an internet search specifying the error message.

# Troubleshooting Scheduled Task Issues

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## Check the following settings for the scheduled windows task:

- If the path to the XML file has blanks and there are no quotes (") around the path+file name.
- That the user account for the task has logged onto the machine running the task and has a user profile.
- That you selected "Run whether user is logged on or not".
- That other task settings – e.g. run with highest privileges – have been properly set up.  
**Note:** Make sure that your user account can run Automate Recurring Entries interactively and can run a scheduled task. Even if using an Admin account, you may have to change Active Directory security settings to run the Automate Recurring Entries scheduled task with your account.
- Whether another task for Automate Recurring Entries – created during testing – is already running. (Delete with Task Manager.)

## Diagnosing Issues with Scheduled Tasks

If you are setting up as a Windows Scheduled Task, a good strategy is to set up a task and run it on a small test database first – such as SAMLTD. If that works, then set up your production database.

- Set up Automate Recurring Entries for the small test database (e.g. SAMLTD).
- ***Make sure that Automate Recurring Entries works interactively before you set up the scheduled task.***
- Create a task using the Create Scheduled Task button in Automate Recurring Entries to make sure that the paths are correct for the program and for the settings XML file. Incorrect path names are often the issue for tasks.
- Run the task from the Task Scheduler and see if it runs properly. This will prove that you have correct file names (with quotes if blanks are in paths).
- Set up the task to run in 5 minutes, then exit the Task Scheduler and log off. Check to see what happened in 6 minutes.
- Look at the Automate Recurring Entries logs.
- Check the history of the task in the Task Scheduler. If tasks are still running, delete them.

Now set up the real databases and schedule tasks to run overnight. Come back and check the next day.

- If the notification emails didn't arrive, you'll have to see where they are being blocked.

## Example of Settings and Permissions Required to Run a Batch File from a Scheduled Task

See [Fix Scheduled Task -- from Help Desk Geek](#) for an example of the permissions and settings to check to fix a scheduled task that runs a batch file (\*.bat). If you can't run a batch file with your account, you cannot run Automate Recurring Entries.



# Automate Recurring Entries FAQ

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Read the user guide carefully in addition to reviewing this FAQ. The user guide provides specific guidelines for configuring Automate Recurring Entries.

## Issues with Running Automate Recurring Entries from a Task

See [Troubleshooting Scheduled Task Issues](#) for more information on diagnosing task issues.

## Installation and Upgrade Issues

**Q: Where can I get release notes for Automate Recurring Entries, and what will they tell me?**

*A: Click the [Release Notes](#) link in the upper left-hand corner of the Automate Recurring Entries product page on the TaiRox web site.*

*Among other things, the Release Notes will tell you about recent fixes and provide program compatibility information. For example:*

Build 2020-09-21

- Support is added for Sage 300 2021.

Build 2020-05-14 (7439)

- Displays a message when a user who is not an administrator tries to create a scheduled task.

Build 2020-04-14 (7408)

- Sets the path variable to the proper folder when it is incorrectly set.

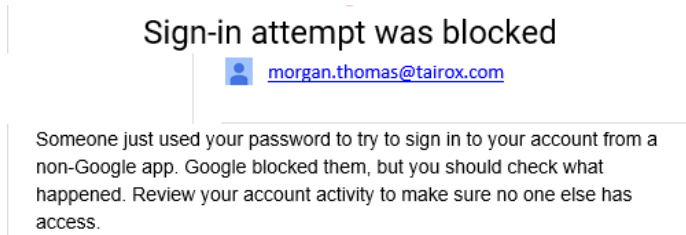
## Email Notification Issues

### **Note regarding “Enable SSL” if unsupported by the SMTP server**

If you select the “Enable SSL” checkbox, the program will first try to send a test email securely. If it does not succeed, it will try to send a test email insecurely. The program will display an error message if the secure test fails, but the insecure test is successful.

If this message appears, it means that:

- Your SMTP server does not support current email communication styles on the port provided. (The “Enable SSL” checkbox has different meanings for different email sending mechanisms, particularly older ones.)
- You should uncheck “Enable SSL” to send emails without SSL protection.

**Q: Why did Gmail reject my login credentials from Automate Recurring Entries.**

*A: The server login was rejected because it didn't come from a "Google" application.*

If you are using a Gmail server for email notifications, your server administrator can change the access restrictions to let Automate G/L Consolidation send notifications. Refer to Google support for details.

See Google support – for example,  
<https://support.google.com/cloudidentity/answer/6260879?hl=en>

**Q: What port number should I use for the SMTP server?**

*A: A "typical" setting would be port 465 with SSL enabled. See the note, above, regarding "Enable SSL".*

The default SMTP server ports are as follows:

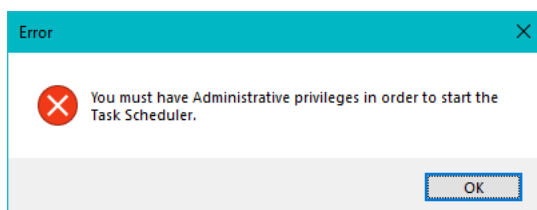
Default Ports:	Server:	Port:
SMTP Server (Outgoing Messages)	Non-Encrypted	25 (or 587)
	Secure (TLS)	587
	Secure (SSL)	465

Ports 465 and 587 are intended for email client to email server communication – sending out email using SMTP protocol.

Port 25 is generally used for communication between mail servers.

## Scheduled Task Issues

**Q: I'm running Windows 10. I get this message when I click "Start Task Scheduler", and a similar message when I try to create a scheduled task. I am an administrator on the server, and I can start the Task Scheduler from the Windows Search field. What's wrong?**



A: Try running Automate Recurring Entries as an administrator. Go to Program Files (x86), right-click AutomateRecurringEntries.exe, and select Run As Administrator.

**Q: Why does Automate Recurring Entries hang when run as a scheduled task?**

A: Check [Troubleshooting Scheduled Task Issues](#) in this guide.

When the program is executed, it uses a command-line parameter (an XML file name) to provide all configuration information for running.

If the XML filename parameter is missing from the command-line, the program starts and waits for you to provide further input – however, the Download Rates screen is hidden. If you open the Task Manager, you can see and end the task.

If the parameter is there but invalid, the program will generate an error and close (if running from the Task Scheduler).

**Q: Why did the scheduled task for Automate Recurring Entries suddenly stop working?**

A: Check the errors logged for the Windows task and try to run Automate Recurring Entries interactively to confirm that it still works. For example, one common reason for a sudden failure is that the license has expired.

Also check [Troubleshooting Scheduled Task Issues](#) in this guide.

**Q: FAIL: System Error. Exception occurred at Automate Recurring Entries. Error='The requested security protocol is not supported.'. Please ensure to install all the latest Windows Updates to enhance your computer's security and performance.**

A: This error message originates from the .NET framework. You can Google the message to see suggestions from other users.

Check the versions of .NET Frameworks on your system and check that TLS 1.2 protocol is enabled on your server.

Note that although Automate Recurring Entries uses .NET Framework 4, you also require .NET Framework 4.5 be installed if you are using some of the newer security protocols (TLS 1.2 specifically). Many websites now require that TLS 1.2 or later be used in order to communicate with them.

Install all Windows updates for your platform. For example, Googling shows that early versions of Windows Server 2012 SR2 and Windows 8 had TLS1.2 issues with other applications, typical support / update article:

<https://support.microsoft.com/en-ca/help/3140245/update-to-enable-tls-1-1-and-tls-1-2-as-default-secure-protocols-in-wi>

**Q: I changed several settings in Automate Recurring Entries, then resaved the XML file under a new name. The name is correct in the UI, but the task continues to run as it did before the changes. What's going on?**

*A: The scheduled task is still using the previous XLM file. You have to edit the scheduled task in the Task Scheduler and specify a new file name on the Actions tab for the task properties.*