TaiRox Productivity Tools FAQ

Read the user guides for your TaiRox products in addition to reviewing this FAQ. Productivity Tools user guides provide general information on using standard TaiRox product features, as well as specific guidelines for each TaiRox Productivity Tool.

What Resources are Available to Answer Sage 300 Questions?

TaiRox programs will display error messages produced by Sage 300, VB, SQL Server, C/C++ Runtime, .NET Framework and Windows.

In many cases, issues with TaiRox Productivity Tools are actually Sage 300 issues – such as database connectivity issues or issues where Sage 300 cannot create a control, and many of these issues have been encountered by other Sage 300 users.

Q: Where can you get fast answers to Sage 300 issues?

A: *Google the error message and check the results.*

Sage 300 error messages are often self-explanatory or can be Googled for an explanation. These messages may indicate fairly simple issues that users can resolve, or environmental issues that consultants can resolve.

In many cases, you may find your answer on an existing Sage 300 support forum, posted by partners who have already encountered your issues.

For example:

https://support.na.sage.com/selfservice/
www.pluscommunity.com/ubbthreads/
https://www.sagecity.com/support_communities/sage300_erp
https://www.acutedata.com/sage-300-kb/

Productivity Tools Installation and Upgrade Issues

Q: Where can I get Productivity Tools release notes, and what will they tell me?

A: *Click the Release Notes link in the upper left-hand corner of the TaiRox Productivity Tools 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 2021-07-05
 - Update Purchase Orders shows additional columns in the display grid after the Load operation:
   Amount Originally Authorized, Amount Remaining, Currency and Last Receipt Number.

Build 2021-06-21
 - Extended Inventory Items will now update item descriptions in some or all of the following
   tables in one step:
   Inventory Control Item Pricing
   Inventory Control Customer Item Number
   Inventory Control Bills of Materials Items
```

```
   Purchase Order Vendor Contact Costs
   AutoSimply Bills of Material Item
   AutoSimply Bills of Material BOM
   AutoSimply Bills of Material Component ITem

Build 2021-06-09
 - Extended Inventory Items will now copy an item to a new item and include all the fields,
including optional fields, in the copy.
```

Q: How do you install TaiRox Productivity Tools?

A: *TaiRox Productivity Tools is a Windows program that uses standard installation and removal protocols.*

Productivity Tools is distributed as 2 files, Setup- Setup-2018-2024.msi and Setup-2012-2017.msi. The files are described in the Platform Requirements section at the bottom of the [Productivity Tools product page](#) on TaiRox.com.

- Use Setup-2018-2024.msi if the Sage 300 version is 2018 or later.

- Use Setup-2012-2017.msi if the Sage 300 version is 2017 or earlier.

Productivity Tools also includes Web Screens for Order Entry and Purchase Orders. These programs are described on [Productivity Tools Web Screens page](#) on TaiRox.com.

Important:

- *Sage 300 must already be installed* on the machine before you install Productivity Tools.

- *Activate Sage's M/T Contacts module* if you are using Sage 2020 PU1 or later. Productivity Tools includes a program to convert TaiRox contact records and add them to Sage's Multiple Contacts module.

- When upgrading, *uninstall the previously installed version of TaiRox Productivity Tools* using the Windows Control Panel/Windows Settings before installing the new version.

- After installing, run RegAcc.exe on each workstation that runs Sage 300 from a server (or run Workstation Setup with "repair").

Q: What is the upgrade procedure for TaiRox Productivity Tools?

A: *When upgrading, uninstall the previously installed version of TaiRox Productivity Tools using the Windows Control Panel/Windows Settings before installing the new version.*

Q: I installed a new version of TaiRox Productivity Tools, but I cannot see the new features. What is the problem?

A: *Check that new features are selected in the Productivity Tools Options program, and check that the new features are included in users' security groups if you use security in Sage 300.*

- Open the Productivity Tools Options program, and look on the Menu tab. Programs must be checked in order to appear in menus and on screens.

- If you use security in Sage 300, you must ensure that the new features are included in security groups for all users that are going to use the features.

Q: How do I convert TaiRox Productivity Tools contacts to Sage 300 contacts?

A: *Sage's M/T Contacts module was added in Sage 2020 Product Upgrade 1. To use Sage contacts, you must install Sage 2020 PU1 or higher, and upgrade TaiRox Productivity tools to the most recent version.*

Step 1: Activate Sage 300 Multiple Contacts using the Data Activation program in Administrative Services.

Step 2: Run Convert Contacts, in the TaiRox Productivity Tools folder on the Sage Desktop.

Step 3: Fill in the Convert Contacts screen and convert your existing contacts to Sage 300 M/T contacts.

The conversion process assigns new contact codes to each of your existing TaiRox Productivity Tools contacts. You cannot convert contacts until you specify how the new codes will be constructed.

All TaiRox contacts will be added to Sage's M/T Contacts module, and all of your existing contacts will be assigned to the customers/vendors to which they are currently assigned. After activating M/C Contacts, A/P and A/R will use the standard Sage 300 multiple contact features.

Q: I have issues running Sage 300 and Productivity Tools after completing a Sage 300 upgrade. What can I do? And how can I diagnose installation issues?

A: *Always upgrade your TaiRox products to the most recent versions when you upgrade Sage 300 products.*

The latest version of a TaiRox product replaces all previous versions of that product and will generally support all versions of Sage 300 from 5.6 through to 2024. In other words, TaiRox product distributions are *not* Sage 300 version specific. If you have recently upgraded Sage 300, make sure that you also upgrade TaiRox products.

A: *Run TaiRox Install Check (available here on the TaiRox website -- http://tairox.com/install-check-for-sage-300-erp-accpac.html)*

Install Check checks the environment on a computer running Sage 300. If the environment is not correct, some or all functions in Sage 300 and third-party applications may not operate correctly.

Install Check leaves no footprint – it does not install, does not change the Windows registry, and does not require a license.

Install collects basic environmental information and checks that certain Sage 300 related operations can be performed. The download is a zipped-up EXE file. Run the EXE, click the Installation Check & System Information buttons, copy the results to the clipboard, save in a Word document and analyze: paying particular attention to any red message.

If you are running a TaiRox program that provides a log file that shows a problem, review the log file as well.

If you can re-create a problem in a known environment (all O/S, Sage 300 and third-party software freshly installed in a recorded order), we can check what might be happening in a matching environment using our developer tools.

Note that SDK applications publish a list of files that are part of their application. Install Check checks this list against files that are actually installed. This helps diagnose situations, for example, when an anti-virus program has incorrectly quarantined a legitimate file.

Q: Why did the Sage Desktop stop working?

We just upgraded a client to a new version of Sage 300. All the workstations but one are working fine. One workstation gets a "DESKTOP has stopped working" message when the user attempts to log on to their live company database; however, it works fine when they log in to SAMINC or SAMSYS.

A: *This error is usually indicative of a Product Update mismatch.*

For example -- We had this error when setting up a test environment. The live data was from Sage 300 2018 PU6 and we restored it into the test environment where the application files were Sage 300 2018 Rev 0. The error went away when we installed PU6 in the test environment.

Q: Where can I find TaiRox Productivity Tools log files?

A: *Open the program whose files you want to view, and click the Log button.*
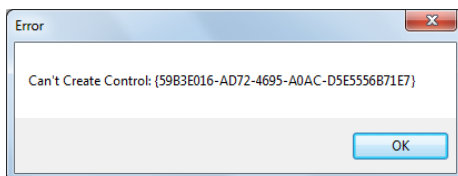
The log files are located in the folder where the program was installed and can be viewed or edited using any program capable of reading a text file (Notepad or Microsoft Word, for example).

Q: How can I deactivate a product that is installed with Sage 300?

A: *Fast DBTools has a deactivation function that correctly deactivates products by deleting all tables with the prefix and the rows in Common Services tables that refer to the prefix. For example, Productivity Tools uses data prefix "XL".*

Q: Why does message "Can't Create Control" appear when running a TaiRox Extended program? (The problem is only occurring for a specific user.)

A Productivity Tools user gets the following message when opening an "Extended" Sage program:

Other users logging in from the same workstation have no problems – for example as either ADMIN or with their own ID.

This user was previously able to run this program successfully, but had an issue and hasn't been able to use the program since.

A: *There are many possible reasons for this message to appear. For example, some Sage 300 containers have had issues.*

First thing to try: Restore Defaults on the Sage screen where there were issues and on the TaiRox Extended version of the screen.

- Right-click the icon on the Sage desktop, and choose Restore Defaults from the pop-up menu.

A: *You should also check that all Sage and TaiRox updates and have been installed.*

A: *Another possibility – if using a remote desktop to run Sage, check if the program's screen size is too large relative to the display resolution of your remote desktop window when you get the Can't Create Control error.*

- If you log onto the server (via remote desktop) and change the resolution does the problem go away?

The problem can arise when one user runs the program successfully and resizes the form – which then causes problems when another user runs the program as a published application.

A: *Google the error message for more troubleshooting leads, and look at the forums listed at the top of this FAQ.*

Using SmartFinder Search

Q: Why don't I have any search results?

I entered part of a name and address for the customer or vendor, but get no results.

A: *All of the word fragments must be present in <u>one</u> of the fields being searched.*

For example, if you searched for "Ross Blvd", you will not see a vendor where "Ross" is in the Vendor Name field and "Blvd" is in the Address 1 field.

Address fields (e.g. the vendor street address, city, state, and country) are treated as a single field, so you can search for "Los Al CA" to find "Los Alamos Dr, California".

Q: Why does the bottom grid for Ship-to and Remit to Locations have locations that do not match the customer or vendor?

A: *The bottom grid displays the locations that match the search criteria.*

Note that the ship-to and remit-to locations *may not* be related to the customer or vendor records displayed in the top part of the screen.

Copying accounts and items to other Sage 300 databases

Q: What entities does Productivity Tools copy across companies?

A: *Productivity tools copies:*

- G/L accounts, segment codes, account groups, and fiscal calendars across multiple companies with the same – or different – functional currencies.
- Customers and vendors across multiple single-currency or multicurrency companies.
- Inventory items, segment codes and locations.

Q: What's in the Results grid for customer / vendor / account / item copy functions before I click the Load button?

A: By default, the grid at the bottom of the form will display any new records that were added in this session.

This feature allows you to bypass the selection process and copy these new records directly to other Sage company databases.

A/S Productivity Tools

User Management

Q: Why can't I add new users or update user permissions?

A: You must be a Sage 300 ADMIN user to run User Management.

Q: Can I update users in more than one company database?

A: The User Management program lets you efficiently manage user setup and permissions within a single Sage 300 company database.

TaiRox also has a more extensive product, SOX User Management, that lets you perform additional user management functions across multiple Sage 300 companies.

A/P and A/R Productivity Tools

Q: Why don't I see all of the tabs in vendor / customer inquiry?

A: Note that some tabs and features shown below may not be available in your company, depending on which Sage 300 modules you use.

For example: the data available in Vendor Inquiry depends on:

- Whether or not PO is installed

- Whether PO is using IC items or is stand-alone

- The permissions of the user

- Whether or not specific TaiRox Productivity Tools are enabled

Q: How do you delete a vendor or customer contact from a company? Does it delete the contact from Sage 300?

To delete a contact from a vendor or customer record, go to the Contact tab, highlight the contact record in the grid, and use the Delete key.

If you do not use Sage's M/T Contacts module (added in Sage 2020 PU1), the contact will be removed completely because the contact is stored only in the contacts list on the Contact tab in the vendor or customer record.

If you activated the M/T Contacts module, the contact list is part of the standard Sage A/P and A/R functionality and is not part of TaiRox Productivity Tools.

Notes concerning <u>M/T Contacts</u> in Sage 300 A/R and A/P:

- If you delete the contacts from A/P or A/R, the contacts will be removed only from the vendor or customer record. The contact record will still exist in the list maintained by Sage's M/T Contacts module.

- To delete the contact from Sage 300, use the M/T Contacts program in Common Services. Note, however, that in the Sage 2020 versions of A/P and A/R, the code for the contact will still appear on the vendor or customer contact tabs until you delete it.

Q: Why can't I copy vendors and customers between companies?

A: There are several possibilities:

- In older versions of Productivity Tools, you cannot copy vendors or customers between single-currency and multicurrency companies. Upgrade to a new version of Productivity Tools if this is your issue.

- You must enter a User ID and Password to copy vendors. Make sure the User ID has sufficient rights to complete the operation in the target companies. You MUST have sufficient permissions to update vendors in the target companies for copying to proceed.

Q: What happened to the Register and Clear Buttons in Extended AP Payment Batch?

A: Extended A/P Create Payment Batch does not have Sage's Register or Clear buttons because Register/Clear requires a System Batch to be created.

With Sage 300, you can only create one unposted System payment batch (as shown in the following Sage 300 error message). However, with TaiRox Extended A/P Create Payment Batch, you can have multiple open payment batches.

When you click the Generate button to create a batch:

- Extended A/P Create Payment Batch uses Sage 300 functionality to create a system generated payment batch.

- It immediately changes the batch type from System to Entered so you can generate another payment batch.

General Ledger Productivity Tools

Q: Why can't I create a new year with Extended Create New Year?

A: You must have sufficient permissions to create a new year in all of the target companies.

A: 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.

Q: Why can't I copy fiscal calendars, account groups, segment codes, or accounts to another Sage 300 company?

A: *You must have sufficient permissions to copy in <u>all</u> of the target companies.*

Also, if no changes are required for a selected item, no update will be performed and the audit stamp will be preserved.

A: *When substituting segments, a copy accounts operation will only be performed on those companies that have the target segment code.*

Inventory Control Productivity Tools

Q: Why can't I see all of the Sage 300 and Productivity Tools buttons on the Extended Inventory Items screen?

A: *You have to increase the width of the Extended Inventory Items screen to see all Sage 300 and TaiRox Productivity Tools buttons.*

Just click the Maximize button in the top bar of the screen to ensure that you can see all Extended Inventory Items features.

Q: Are Delete Items and Delete Bills of Material safe?

A: *TaiRox Delete BOMs uses Sage 300 business objects to delete bills of material, so the resulting database will have at least as much integrity as if a Sage 300 UI was used to delete BOMs.*

TaiRox is not responsible for any damaged or lost data as a result of using Delete BOMs.

Delete BOMs is driven by XML files that identify Sage 300 and third-party products with the tables and columns of the products that contain inventory BOMs. TaiRox does not guarantee that these XML files are accurate, complete or up-to-date, and that all references will be detected by Delete BOM's search.

If a BOM has references undetected by Delete BOMs, in many cases data can be repaired by simply adding the BOM back to the database. Delete BOMs creates a log of all BOMs that it deletes.

A Sage 300 Certified Consultant should be involved in any extensive deletion process so that integrity checks and other tests can be performed after deletion.

Note that if other users are using Sage 300 when Delete BOMs is being run, the results of the search may be out-of-date as displayed.

Q: Why can't I delete a BOM?

A: *You cannot delete a bill of material that is a component item (or subassembly) of a multilevel BOM.*

There can also be data-integrity errors that prevent some deletions, in which case an error message will appear.

Q: Why can't I copy item segment codes or inventory items to another Sage 300 company

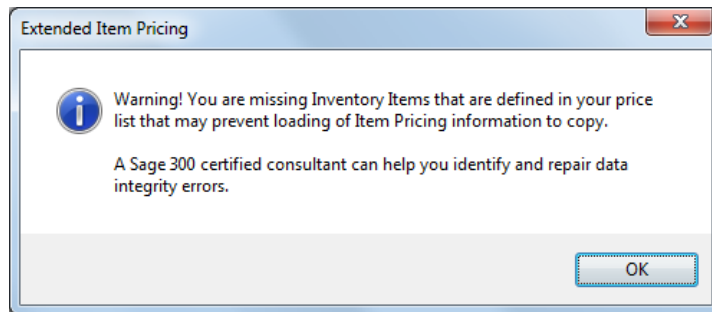A: *You must have sufficient permissions to copy in all of the target companies.*

Also, if no changes are required for a selected item, no update will be performed and the audit stamp will be preserved.

Q: Why does the program copy different pricing information to target companies?

A: *Certain pricing fields, for example "Markup Cost" are in the functional currency of a company. Extended Item Pricing will only copy these fields if the functional currencies of the source and target companies match.*

- When copying to a multicurrency target, all non-cost price information is copied.

- When copying to a single-currency target, only prices whose currency matches the functional currency of the target company are copied.

Q: I got the following error when copy item pricing. What does it mean?

A: *Copy Item Pricing runs a short integrity check to ensure that items exist for all prices in the database. Missing items can prevent the program from copying pricing information.*

This error usually occurs when an inventory item was incorrectly deleted from the Sage database – for example, using SQL Management Studio. Running. Use Sage's Integrity Check or TaiRox Fast Data Integrity to identify the problem.

Order Entry Productivity Tools

Q: Why does Extended Order Entry crash? I have Sage Payment Solutions activated for the database.

A: *We know that Sage Order Entry crashes when you run OE on a database that has SPS activated but not installed. This typically happens when a consultant has copied a client database to their own environment. And if Sage Order Entry crashes so will Extended Processing.*

Check whether Order Entry and SPS work with the live company database.

Run Install Check to see which modules and version numbers are installed.

Q: Why can't I delete an order?

A: Delete Orders uses Sage 300 objects to delete orders safely. If Sage 300 Order Entry will not delete an order, neither will Delete Orders.

- You cannot delete a partially shipped order.

- You must uncheck the "Keep Transaction History" checkbox in O/E Options before running Delete Orders to delete completed orders.

Many users follow these steps for deleting orders:

1. Run Day End in Inventory Control.

2. Uncheck "Keep History" in OE Options.

3. Use Delete Orders.

4. Select the "Keep History" option again *so the next Day End doesn't delete ALL order history!*

For more information on running Day End Processing with Order Entry, see Stephen Smith's Day End Processing blog post. (Stephen was Chief Software Architect for Sage 300 from 2004 to 2016.)

A: There may be data-integrity errors that prevent some deletions, in which case an error message will appear.

Q: I used Update Orders to change kit detail lines from Kit 1 to Kit 2. However, it didn't work for several orders, which still show Kit 1 on order lines. What happened, and how can I change the kit details on these orders?

A: To change kit details, Update Orders deletes the kit detail line from the posted order and then adds a new kit line with the appropriate changes – because you cannot change the details on a posted kit line.

*However, **if an order has been partially shipped**, the kit order lines cannot be deleted – this is a restriction imposed by the Sage 300 Order Entry business logic. If you are using Update Order in Extended Order Entry, the program will display an error message. If you are using Update Orders, the program will display an error in the log file, like this:*

```
11/05/2023 2:56:54 PM
11/05/2023 2:56:54 PM Updating kits for Order Number ORD025035...
11/05/2023 2:56:54 PM      Cannot delete detail lines from this order because you have already shipped some items.
11/05/2023 2:56:54 PM Updating kits for Order Number ORD025070...
11/05/2023 2:56:54 PM      Cannot delete detail lines from this order because you have already shipped some items.
11/05/2023 2:56:54 PM Updating kits for Order Number ORD025083...
11/05/2023 2:56:54 PM      Cannot delete detail lines from this order because you have already shipped some items.
11/05/2023 2:56:54 PM
11/05/2023 2:56:54 PM Update Orders complete.
```

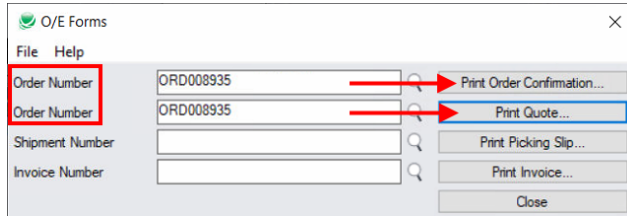*A: To change kit details on a partially shipped order:*

1. Change the Qty. Ordered for the kit item line to 0.

2. Insert a new order line, and specify the new kit number.

Note that you can change quantities on an item line and then repost.

Q: Why can't I create a purchase order using the Create Purchase Order button in Extended Order Entry?

A: The button is greyed out unless the OE order or quote is Posted, Active, and not On Hold.

Q: Why are there two fields with the same order number when I open O/E Forms?

A: The fields are associated with the buttons on the right side, so you can print the order confirmation for the order or print the quote.

Q: Why can't I see all of the Sage 300 and Productivity Tools buttons on the Extended Order Entry screen?

A: You have to increase the width of the Extended Order Entry screen to see all Sage 300 and TaiRox Productivity Tools buttons.

Just click the Maximize button in the top bar of the screen to ensure that you can see all Extended Order Entry features.

Purchase Orders Productivity Tools

Q: Why can't I delete a purchase order?

A: Delete Purchase Orders uses Sage 300 objects to delete POs safely. If Sage 300 Purchase Orders will not delete a PO, neither will Delete Purchase Orders.

Once PO items have been received, you cannot delete the PO.

A: There may be data-integrity errors that prevent some deletions, in which case an error message will appear.

Q: Why can't I see all of the Sage 300 and Productivity Tools buttons on the Extended PO Entry screen?

A: You have to increase the width of the Extended PO Entry screen to see all Sage 300 and TaiRox Productivity Tools buttons.

Just click the Maximize button in the top bar of the screen to ensure that you can see all Extended PO Entry features.