TaiRox™

Productivity Tools

Product Installation and Web Screens Customization Guide

Important Notice

Installing Productivity Tools

TaiRox Productivity Tools conforms to standard Windows installation and removal protocols.

You must install Sage 300 before you install Productivity Tools.

> **Important Note:** *When upgrading, uninstall the previously installed version* of Productivity Tools using the Windows Control Panel *before* installing the new version.

The Distribution Files

TaiRox Productivity Tools for the **Sage 300 <u>Desktop</u>** is distributed as 2 files, "Setup-2018-2025.msi" and "Setup-2012-2017.msi".

- **Setup-2018-2025.msi –** installs Productivity Tools on the Sage 300 Desktop – for <u>Sage 300 version 2018 or later</u>.

- **Setup-2012-2017.msi –** installs Productivity Tools on the Sage 300 Desktop – for <u>Sage 300 version 2017 or earlier</u>.

If you use Sage 300 Web screens, you can also install **<u>Productivity Tools Web screens</u>** for Sage 300. The Web screens are launched from Sage 300cloud running in a Web browser.

Sage 300cloud web screens are version-specific. You must install web screens that match your version of Sage 300.

- Sage 300 version 2024_0   *for the original release of Sage 300 2024*
  - TPTWeb_2024_0_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2024_0.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2024_0.zip   -- customizes Shipment Entry screen

- Sage 300 version 2023_3   *for Sage 300 2023.3 (PU3)*
  - TPTWeb_2023_3_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2023_3.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2023_3.zip   -- customizes Shipment Entry screen

- Sage 300 version 2023_1   *for Sage 300 2023.1 (PU1)*
  - TPTWeb_2023_1_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2023_1.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2023_1.zip   -- customizes Shipment Entry screen

- Sage 300 version 2023_0   *for the original release of Sage 300 2023*
  - TPTWeb_2023_0_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2023_0.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2023_0.zip   -- customizes Shipment Entry screen

- Sage 300 version 2022_2   *for Sage 300 2022.2 and higher (e.g. PU2, PU3)*
  - TPTWeb_2022_2_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2022_2.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2022_2.zip   -- customizes Shipment Entry screen

- Sage 300 version 2021_2   *for Sage 300 2021.2 and higher (e.g.* PU5, PU6*)*
  - TPTWeb_2021_2_setup.msi   -- installs Web Screens
  - TaiRoxXLOrderEntry_2021_2.zip   -- customizes Order Entry screen
  - TaiRoxXLShipmentEntry_2021_2.zip   -- customizes Shipment Entry screen

You import the Order Entry and Shipment Entry customization using the [Sage 300 Web Admin Configuration application](#)

When installing Productivity Tools, keep the following points in mind.

- You must install the Productivity Tools using "Setup-2018-2025.msi" or "Setup-2012-2017.msi" on each computer where Sage 300 is physically installed.

  If you have one or more RDP servers and use workstation setup, make sure that you install Productivity Tools on all RDP servers – *and run RegAcc.exe on each workstation that runs Sage 300 from a server* (or run Workstation Setup with "repair").

- You must activate Productivity Tools using the Sage 300 Activation program for each company that uses Productivity Tools.

- To use TaiRox Productivity Tools <u>Web Screens</u> features, you must:
  o Install Productivity Tools Web Screens where Sage 300 Web Screens are installed.
  o Import all Productivity Tools customizations for Sage 300 Web screens using the Sage 300 Web Admin Configuration application.

New Features in Productivity Tools

TaiRox continually adds new features to Productivity Tools. For example, the following features were added to TaiRox Productivity Tools from December 2021 to August 2022.

See the [Release Notes](#) on the Productivity Tools product page on the TaiRox Website for up-to-date changes.

- Apply Documents now has a Document Order drop-down so payments can be applied by Invoice Date, by Due Date, or by Document.

- Ship Orders includes the FOB Point field in the drop-down list for range filtering.

- Update Orders, Substitute Items, now provides an option to retain the original item, zeroing its quantity on an order. Update Orders also has a new option: Update Ship Via.

- Invoice Shipments now displays the tracking number in the shipments grid.

- Extended PO Invoice Entry lets you select receipts from multiple vendors.

- The Extended Order Entry "Ship" pop-up now lets you edit Quantity on Order.

- A new program, Copy G/L Accounts, was added for Productivity Tools Enterprise licenses.

- Two new programs, Create A/R Credit Notes and Create O/E Credit Notes, allow you to create credit notes for multiple A/R invoices and O/E invoices in one step.

- Extended Order Entry, Create Purchase Orders, lets you set the expected arrival date.

- Productivity Tools supports the Advanced Complex Passwords feature added in Sage 300 2022 PU2.

- Extended Customers and Extended Vendors copies customers and vendors to other company databases regardless of whether the source and target company's functional currency match, or they are multicurrency or not.

- A new program, Email Packing Slips, will send emails to customers reporting which items on an order were shipped.

Preparation & Planning, Prior to Software Installation

Read this document and create an upgrade plan. The plan should include the following items.

1. ***Prepare a list of all servers and workstations that will require software upgrades:***
   - o   All computers where Productivity Tools is installed.
   - o   All computers that run Sage 300 applications, including the server for Sage 300 Web Screens.

   <u>The Productivity Tools installation packages include the following installation files for Productivity Tools 2018-2025:</u>

   - o   **Setup-2018-2025.msi**
   - o   **TPTWeb_2024_0_setup.msi**
   - o   **TPTWeb_2023_3_setup.msi**
   - o   **TPTWeb_2023_1_setup.msi**
   - o   **TPTWeb_2023_0_setup.msi**
   - o   **TPTWeb_2022_2_setup.msi** – for Sage 300 2022 (PU2 and higher)
   - o   **TPTWeb_2021_2_setup.msi** – for Sage 300 2021 (PU2 and higher)
   - o   **Customization Zip Files** – for Sage 2021.2, 2022.2, 2023.0, 2023.1, 2023.3 & 2024.0
     - −   TaiRoxXLOrderEntry_*202n_n*.zip, TaiRoxXLShipmentEntry_*202n_n*.zip

   Note: The installation package also contains **"**Setup-2012-2017.msi" to install Productivity Tools for Sage 300 2012-2017 or lower.

2. ***Schedule an outage with enough time to complete all installation/update steps.***
   Note that all users must log out of Sage 300 as the first step of an outage. Consider whether or not you wish TaiRox resources to be available during the outage.

> **Note:** TaiRox will review any outage plan at no charge prior to the outage if received several days prior to the outage.

Steps for Updating to Productivity Tools 2018-2025

Productivity Tools includes Sage Desktop and Web Screens installation programs as well as customization zip files for Sage 300 Web Screens.

- ***Setup-2018-2025.msi*** – installs the Productivity Tools programs on the Sage Desktop.

- ***TPTWeb_202n_n_setup.msi*** – installs web screens for TaiRox Productivity Tools.

  Productivity Tools Web Screens are launched from Sage 300cloud running in a Web browser. You must install them on the server where Sage 300 Web Screens are installed.

  Sage 300cloud Web Screens are version-specific. You must install TaiRox Web Screens that match your version of Sage 300.

- ***TaiRoxXLOrderEntry_202n_n.zip*** and ***TaiRoxXLShipmentEntry_202n_n.zip*** -- installs customizations to Sage 300 web screens – such as the SmartFinder for looking up customers on the Order Entry screen and the optional fields that appear on the Order Entry customer tab.

  You import TaiRox Productivity Tools customizations for Sage 300 Web Screens using the Sage 300 Web Screen Admin Configuration application.

Copy customization files for your version of Sage 300 to the server desktop so you can find them during installation.

To install / update Productivity Tools:

1. Have all users log out of Sage 300 – Web screens and Sage 300 Desktop.

2. *Uninstall prior versions of "TaiRox Productivity Tools" from all computers running Sage 300 applications.*

   For instructions on uninstalling applications, see Uninstalling Productivity Tools.

3. *If you previously installed the Web Screens, uninstall "TaiRox Productivity Tools Web Screens" from all computers running Sage 300 applications.*

   Run "iisreset" after uninstalling a prior version of Productivity Tools Web Screens, and clear your browser's cache of temporary Internet files.

4. Install the new version of Productivity Tools software on all computers running Sage 300 applications using the following installation file.

   ***Setup-2018-2025**.msi*

   This program installs the new version of TaiRox Productivity Tools for the Sage 300 Desktop. For installation screen details, see Screens: Installing Productivity Tools.

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

5. If this is a new installation, sign in to Sage 300 as an administrator and set up the program:

   - Activate the new version of Productivity Tools. For details, see Activating TaiRox Productivity Tools.

   - On the Sage 300 Desktop, go to the Productivity Tools folder, open the License Information program, and enter the TaiRox license information.
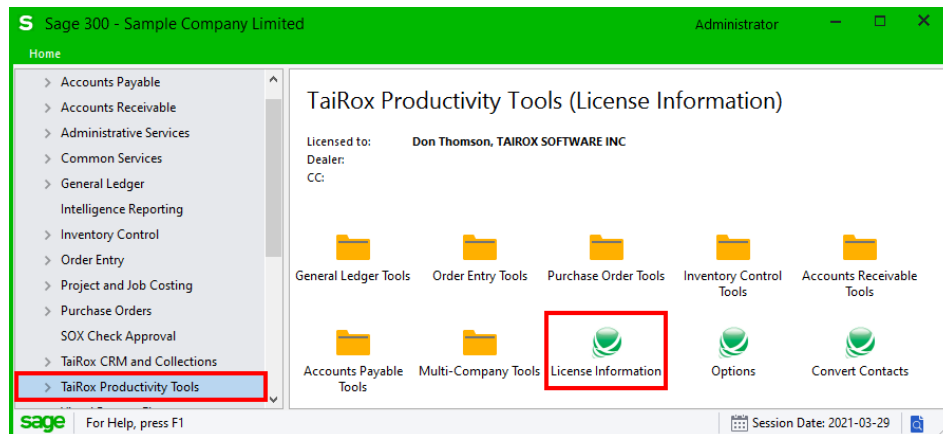
   Note: The Company Name for the TaiRox license ***must exactly match*** the name of the company in the Sage 300 License Manager – including capitalization, punctuation and spacing.

   - Open the Options program to specify which Productivity Tools you want to display on the Sage 300 Desktop.

     Note that these settings do not affect the menus for Web Screens.

   - Review the Productivity Tools documentation for information on other settings that affect individual Productivity Tools.

- Set up Security Groups and User Authorizations for Productivity Tools if you use security with Sage 300.

    If you do not use Sage 300 Web Screens, you have completed the installation and setup steps for TaiRox Productivity Tools.

    For more information, select the User Guide from the Productivity Tool's Help menu.
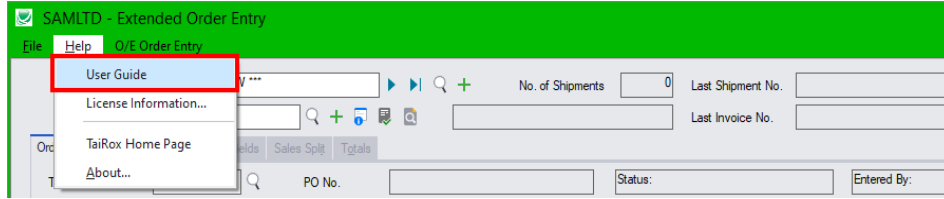
6. Install Productivity Tools Web Screens using one of the following installation files:

    Sage 300cloud web screens are version-specific. You must install web screens that match your version of Sage 300 – such as 2022.2 or 2024.0.

    TPTWeb_2024_0_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2024.0</u> (original release).

    TPTWeb_2023_3_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2023.3</u> (with PU3).

    TPTWeb_2023_1_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2023.1</u> (with PU1).

    TPTWeb_2023_0_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2023.0</u> (original release).

    TPTWeb_2022_2_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2022.2</u> (with PU2 or higher).

    TPTWeb_2021_2_setup.msi

    Installs the Web Screens for Productivity Tools for <u>Sage 300 version 2021.2</u> (with PU2 or higher).

7. Delete any existing Productivity Tools customizations from prior versions.

    - Login to the Sage 300 Web Screen Admin Configuration application.
        <web server>/Sage 300/Admin

    - *Delete prior versions of Productivity Tools Web Screen customization. (Select it from the Package ID dropdown and click the Delete button.)*

8. Import new customization packages for Productivity Tools. See the next section, [Installing Sage 300 Web Screen Customizations](), for details on importing customization packages.

    *For example –to import customizations for Sage 300 version **2024.0**, use zip files TaiRoxXLOrderEntry_**2024_0**.zip and TaiRoxXLShipmentEntry_**2024_0**.zip*

    - Login to the Sage 300 Web Screen Admin Configuration application.
        <web server>/Sage 300/Admin

    - *Delete any previous versions of Productivity Tools Customization Packages by selecting them from the dropdown, and clicking the Delete button.*

- *Use the Browse button to find new customization package zip files.*
- *Use the Import button to import them.*
- *Use the Assign button to assign them to Sage 300 company databases.*

Run "iisreset" after installing the Productivity Tools Web Screen customizations and clear your browser's cache of temporary Internet files.

See [Clearing Your Browser Cache After Installing Customizations](#).

Import all customization packages *for your version of Sage 300* that are included with the Productivity Tools installation package.

Appendix A: Installing Web Screen Customizations

Follow these instructions to import the Web Screen customization packages for Productivity Tools. Customization packages add features to the standard Sage 300 Web screens – such as the Customer SmartFinder and Optional Fields added to the Sage 300 Order Entry program.

To install Web Screen customization packages for Sage 300cloud:

- Install the latest version of Productivity Tools and Productivity Tools Web Screens.

- Copy the customization zip files for Productivity Tools (for example, TaiRoxXLOrderEntry_*2024_0*.zip) to a convenient location on a Sage 300 Web Server. You will need to find them easily to import them.

  Make sure that you copy the customization files that match your version of Sage 300.

- Open your browser and browse to ***<Sageserver\instance>*/Sage300/admin** to open the Sage 300 admin portal.
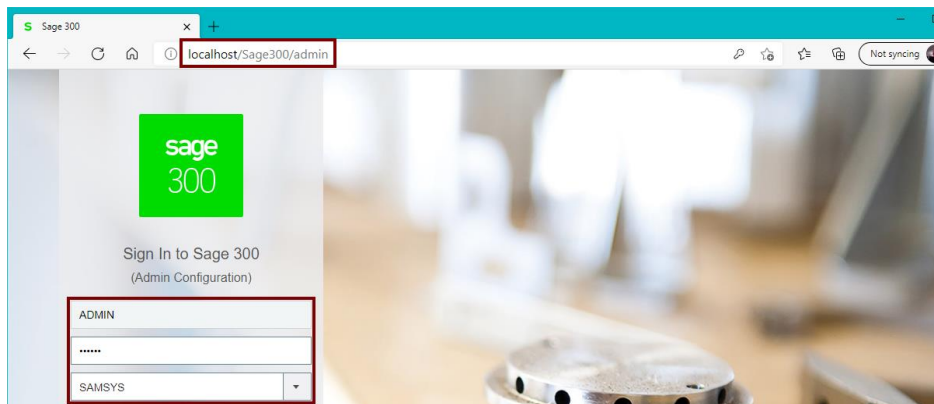
- Select the System database, and sign in with an Admin password.

On the Import Customization Packages screen:

- Click the Browse button and find a Customization zip file (for example, TaiRoxXLOrderEntry_2024_0.zip).
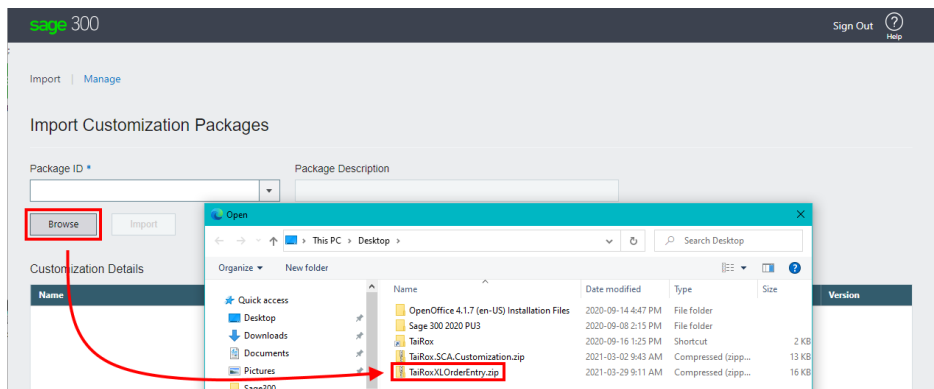
  To Delete a prior customization first, *select the prior customization from the Package ID dropdown, and click the Delete button.*

- Double-click the zip file to select it, and click the Import button.)

- Click the Assign button at the bottom of the Import screen, select the companies that use TaiRox Productivity Tools, and click OK.
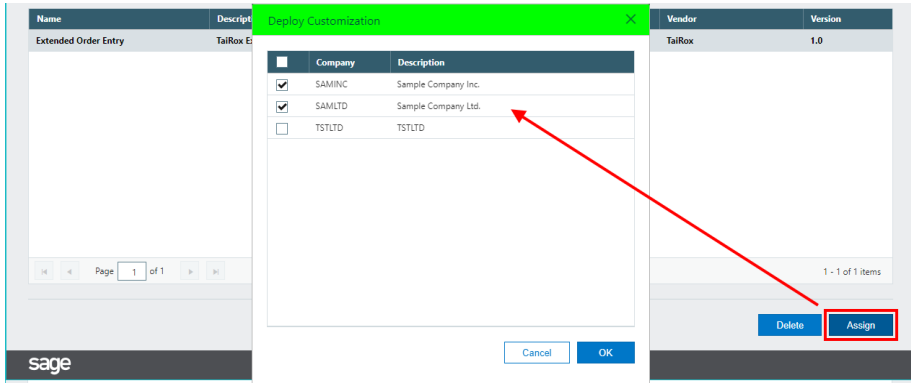

- Import the next customization package – e.g., TaiRoxXLShipmentEntry_*2024_0*.zip.
  - Follow the instructions above until you have imported and assigned all Productivity Tools customization packages.

After you have imported and assigned all customization packages:

- Sign out of Sage 300 and exit the browser.

- Open a command prompt and enter **iisreset** to restart iis. You may have to run the command prompt "As Administrator" to have sufficient permissions.
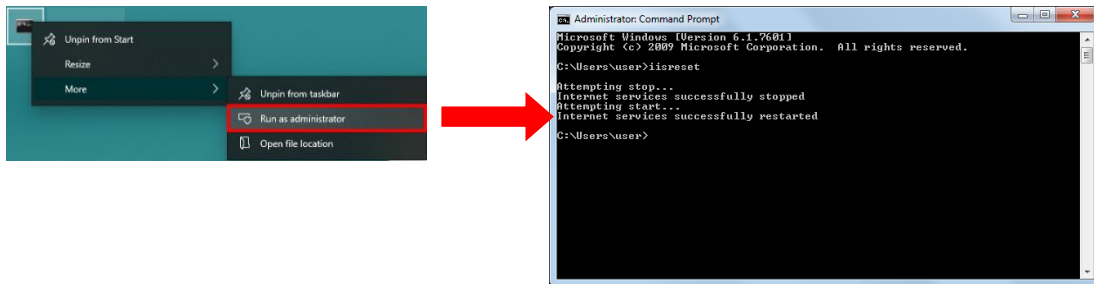
- Verify the installation by signing in to the Sage 300 portal and opening the Order Entry program.
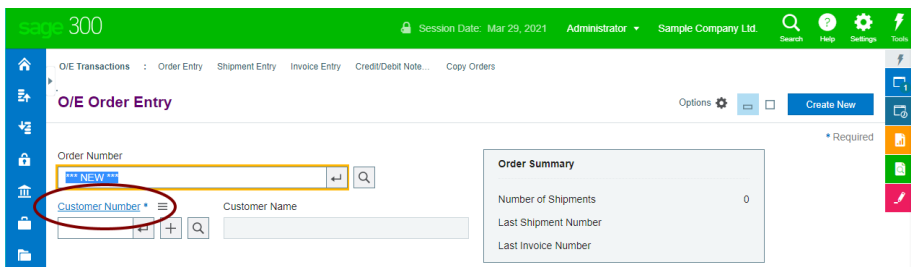
In this case, you can see and test the link for the Customer SmartFinder on the Sage 300 Order Entry Web screen.

Appendix B: Clearing Your Browser Cache

**Note that all users should clear their browser caches when
you update to a new version of Sage 300 or TaiRox Web screens.**

Follow these instructions to clear the cache on different browsers:

Microsoft Edge
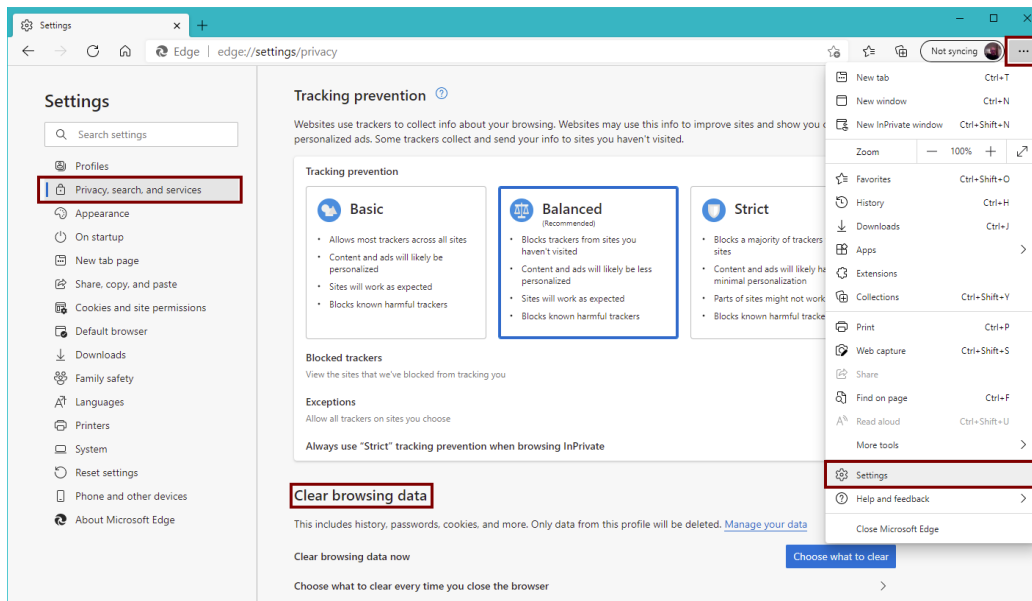
1. Click the **Settings and More** button in the upper-right corner to display the menu.

2. Select **Settings** from the Menu.

3. Select **Privacy, Search, and Services** from the Settings Menu.

4. Scroll down to **Clear Browsing Data**.

5. Click the **Choose What To Clear** button.

6. Select a Time Range of **All Time**.

7. Check **Cached Images and Files**. You can uncheck the other data if you want to keep it.

8. Click the **"Clear Now"** button.

9. Close ALL Edge browser windows

10. Restart Edge and sign on to Sage 300 again.

Internet Explorer
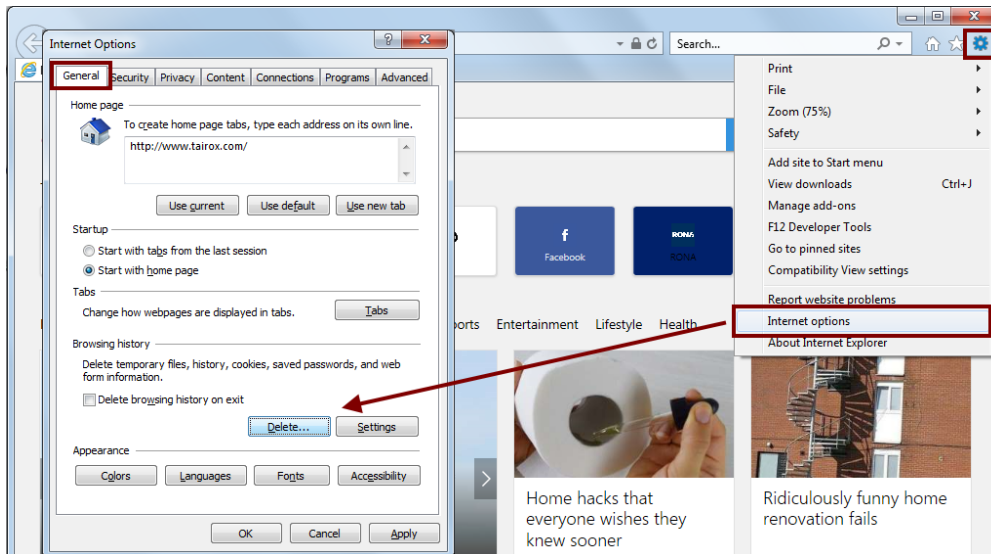
1. Go to the **Tools** menu (click button in the upper-right corner to display the menu).

2. Select "**Internet Options"** from the menu.

3. Under the **General** tab, **Browsing History** section, click on the **Delete** button

4. Check/select only the following items on the list:

   o   Preserve Favorites Website data
   o   Temporary Internet Files and Website files

5. Uncheck/deselect the rest of the items on the list, especially the **Passwords** item.

6. Click **Delete**.

7. Wait for the message **Internet Explorer has finished deleting the selected browsing history** to appear at the bottom of the page.

8. Click **Apply.**

9. Click **OK.**

10. Close ALL Internet Explorer browser windows.

11. Restart Internet Explorer and sign on to Sage 300 again.

Google Chrome
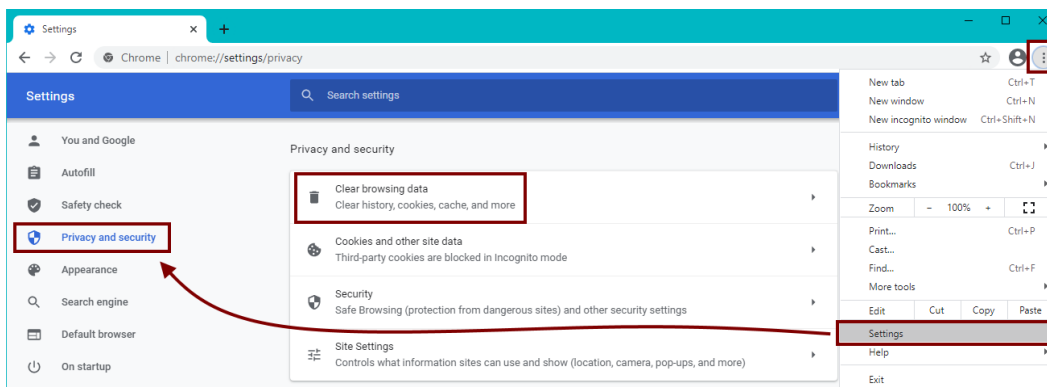
1. Click the **Settings** button (in the upper-right corner of the browser window).
2. Select **Settings**.
3. Select **Privacy and Security** on the Settings menu.
4. Click **Clear browsing data**.
5. Select **All Time** on the dropdown menu.
6. Check/select the following item on the list:
   o Cached images and files
7. Uncheck/deselect the rest of the items on the list, especially the **Passwords** item.
8. Click the **Clear data** button.
9. Close ALL Google Chrome browser windows
10. Restart Google Chrome and sign on to Sage 300 again.

Mozilla Firefox
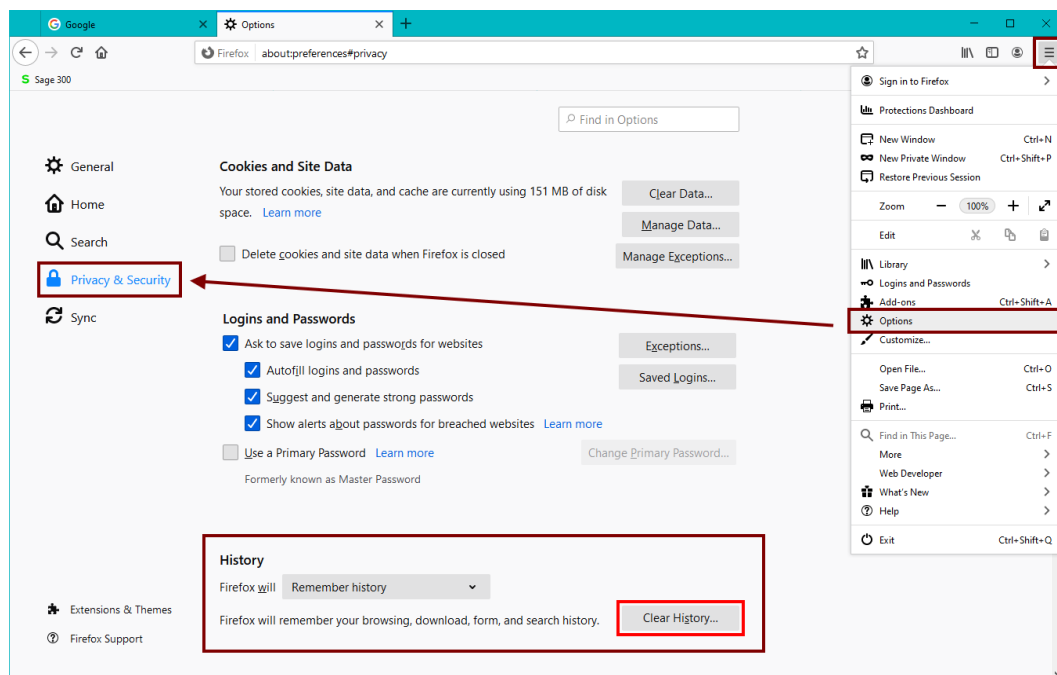
1. Click on the menu button (three bars in the upper-right corner of the browser window).
2. Select **Options**.
3. Select **Privacy and Security** from the Options menu.
4. Scroll down to the **History** section and click the **Clear History** button.
5. For "Time Range to Clear", select **Everything**.
6. Check/select only the following item on the list
   o Cache
7. Uncheck/deselect the rest of the items on the list, especially the **Active Logins** item.
8. Click the **OK** button.

9. Close ALL Mozilla Firefox browser windows

10. Restart Mozilla Firefox and sign on to Sage 300 again.

Apple Safari
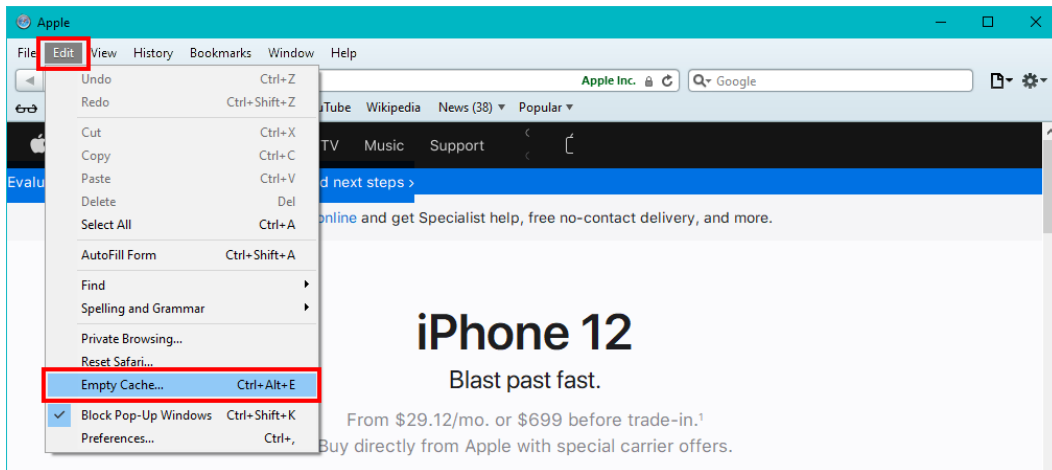
1. Select **Edit** on the menu bar.

2. Select **Empty Cache**.

3. Click **Empty**.
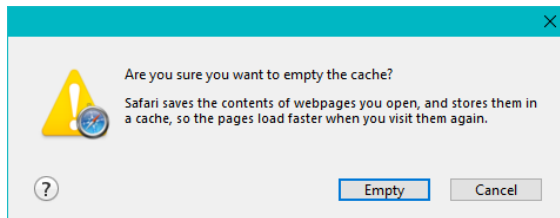
4. Close ALL Apple Safari browser windows

5. Restart Apple Safari and sign on to Sage 300 again.

Appendix C: Desktop Installation Program Details

Uninstalling Productivity Tools
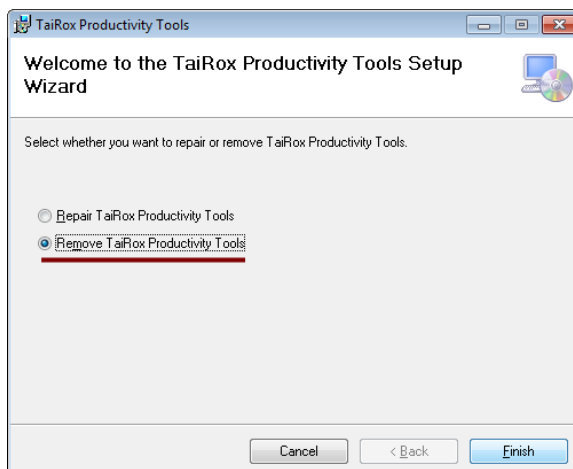
To uninstall Productivity Tools:

- Navigate to the Windows Control Panel, click on the Programs and Features link and select TaiRox Productivity Tools from the list of installed programs.
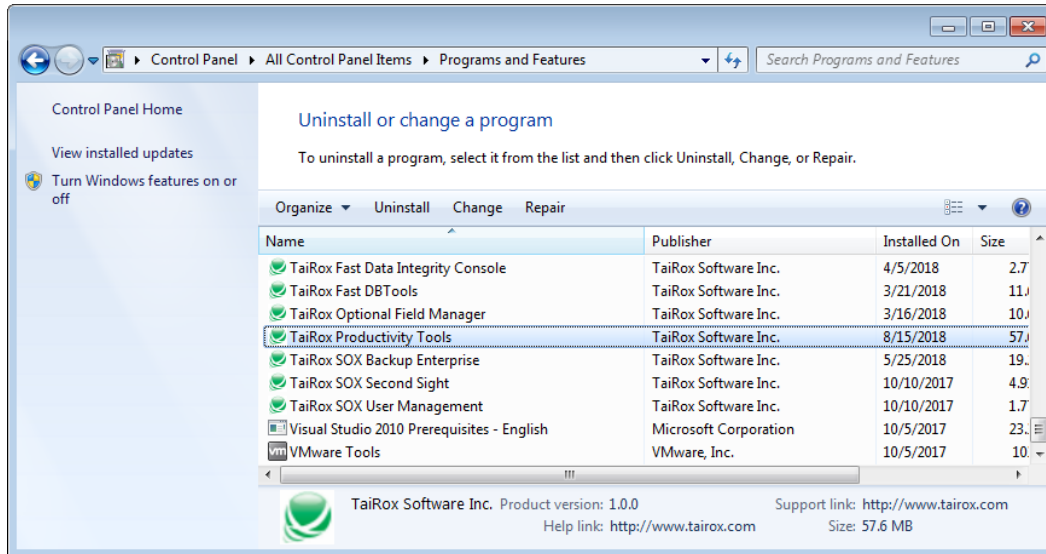
- Double-click the entry for TaiRox Productivity Tools.

  OR

- If available, double-click the distribution file that you used to install Productivity Tools (either Setup-2018-2025.msi or Setup-2012-2017.msi, depending on your version of Sage 300).

- Select "Remove TaiRox Productivity Tools" on the screen that appears, and click the Finish button.

Screens: Installing Productivity Tools

Productivity Tools use standard Windows installation programs.

If you are running Sage 300 2020, 2021, 2022 or 2023, you can also install the Web Screens after installing Productivity Tools for the Sage 300 Desktop.

Step 1: Welcome

- Double-click "Setup-2018-2025.msi" or "Setup-2012-2017.msi", depending on your version of Sage 300.
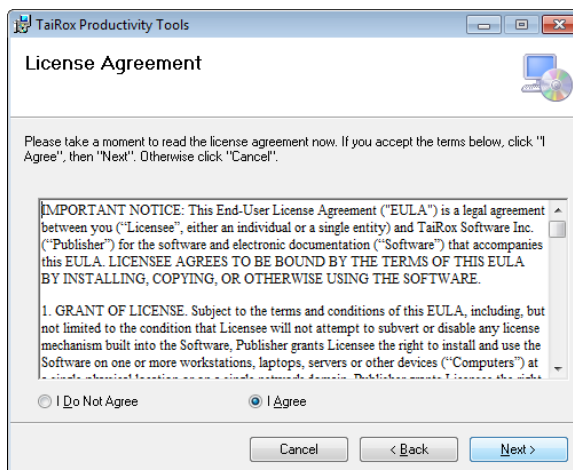
  A welcome screen will appear.
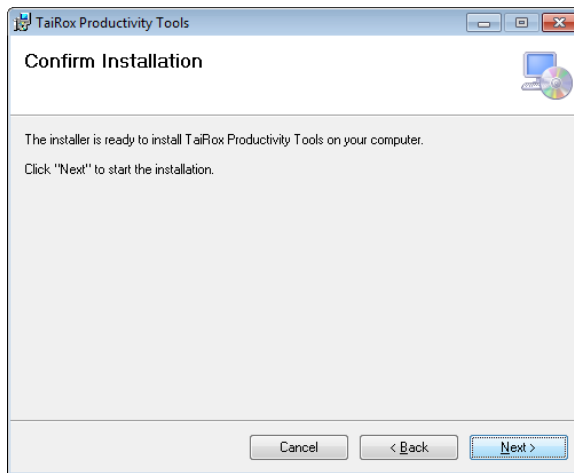
- Click the Next button.
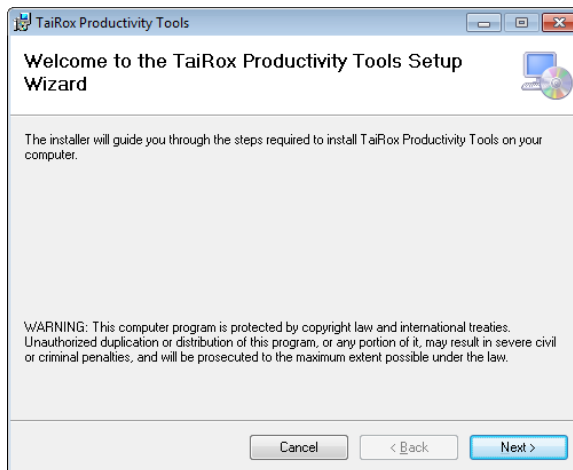
Step 2: License Agreement

- On the second screen, you must accept the license agreement terms before proceeding.

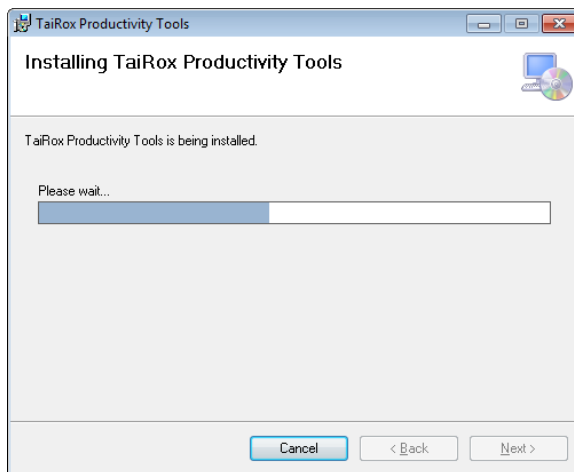- Select the "I Agree" radio button and click the Next button.

Step 3: Confirm Installation

- Click the Next button to start the installation.
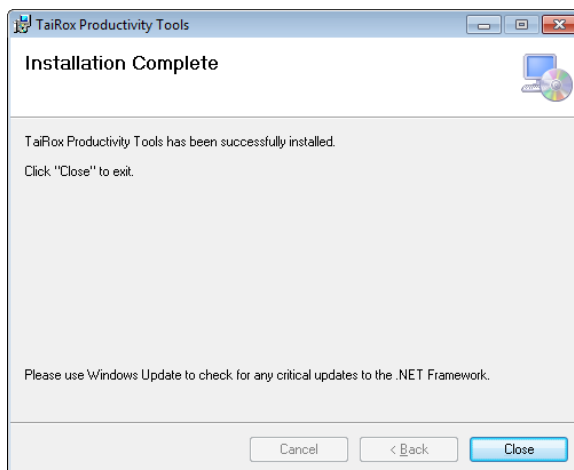
Step 4: During Installation

A screen with a progress bar will appear for a few seconds.

Step 5: Installation Complete

When installation is complete, the following screen will appear.

- Click the Close button to exit.

Activating Productivity Tools

Once you install Productivity Tools, you must activate it just like any core Sage 300 application.

You must activate it in all companies for which you want to use Productivity Tools.