

Updating TaiRox Licenses and Products

This guide provides instructions for:

- [Renewing TaiRox software licenses.](#)

TaiRox software licenses must be renewed annually for continued use of products.

- [Updating from prior versions to new versions of TaiRox products.](#)

TaiRox continually updates software products to add new features, maintain compatibility with new versions of Sage 300, and to address any issues that our users face using TaiRox products with Sage 300 or other 3rd party products.

Most TaiRox software updates simply involve uninstalling the previous version and installing the new one – no matter what version of Sage 300 you are using. In many cases, a single TaiRox program works with Sage 300 2014 to 2024.

Before you update TaiRox products:

- Read the new TaiRox User Guide and other product documentation for updated TaiRox products to understand new product features or program settings and any special update procedures or considerations.
- Test the software update procedure on a copy of your Sage 300 database *before* you install updates in your production system – especially, if you are also updating your version of Sage 300 or other 3rd party software products.
- Note that this document does not fully cover updating the following TaiRox products:
 - TaiRox Productivity Tools
 - Productivity Tools Web Screens
 - SOX Backup (update to Fast Database Management)
 - SOX Check Approval
 - SOX Check Approval Web Screens
 - TaiRox CRM and Collections
 - TaiRox Collections

See the User Guide and update instructions that come with these TaiRox products for information on installing and updating.

Renewing TaiRox Software Licenses

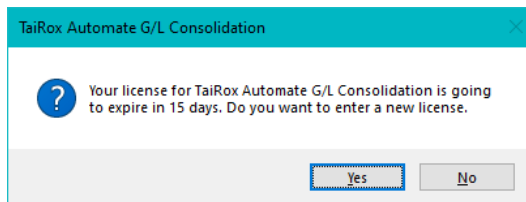
TaiRox software licenses must be renewed annually for continued use of our products.

To update the license, the TaiRox software client purchases a new license through their Sage 300 business partner and pastes the new license into the TaiRox license screen.

License Renewal Process

The TaiRox license renewal process goes something like this:

- We send a renewal notice to the client's Sage 300 business partner about 6 weeks prior to the license expiry date. We presume partners then send a renewal notice to their clients.
- 30 days prior to the expiry date a message pops up when an expiring program is run that shows the number of days to expiry.



This should prompt the client to contact their business partner to renew the software license.

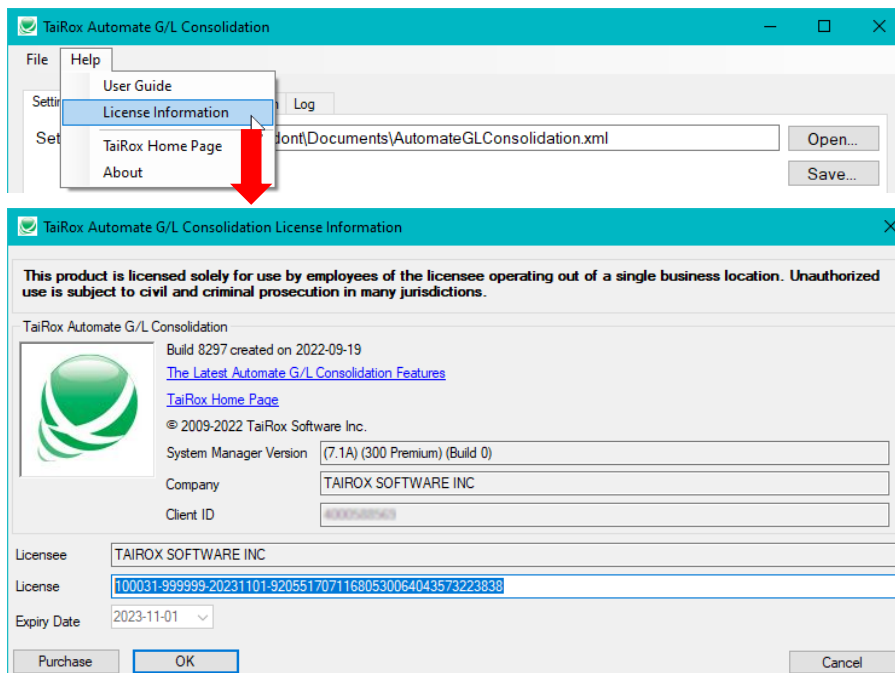
- The business partner requests a new license key from TaiRox Software, and provides us with the company name and client ID exactly as they appear in the Sage 300 License Manager.

Important: To generate a valid license key, you must provide the client company name and client ID exactly as they appear in the Sage 300 License Manager.

Most licensing issues arise from company name discrepancies – such as different capitalization or punctuation from the name in the Sage 300 License Manager.

Note: *If you change your company name, make sure to send TaiRox the new name. This is a common reason for the name discrepancies that we encounter!*

- You can enter the new license key for a TaiRox product by choosing **Help > License Information** from the TaiRox product's Help menu – as below.



This license screen also appears if you click the “Yes” button on the expiry message box in answer to the question: “Do you want to enter a new license now?”

You can paste the new TaiRox license key into the license screen, and click OK to finish.

- If a license expires before the license is renewed, the program will go straight to the license screen on startup, and won't run until a new license is pasted in.

Updating from Prior Products to New Versions

Refer to the User Guides and Update documentation to update the following products.

- Most of these products update the Sage 300 desktop, and therefore require an outage where all users log out of Sage 300.
- You should test these product updates on a copy of your production database. In many cases, they also require additional installation procedures described in the User Guides.
 - TaiRox Productivity Tools
 - Productivity Tools Web Screens
 - SOX Backup Enterprise & Express*
 - SOX Check Approval
 - SOX Check Approval Web Screens
 - TaiRox CRM and Collections
 - TaiRox Collections

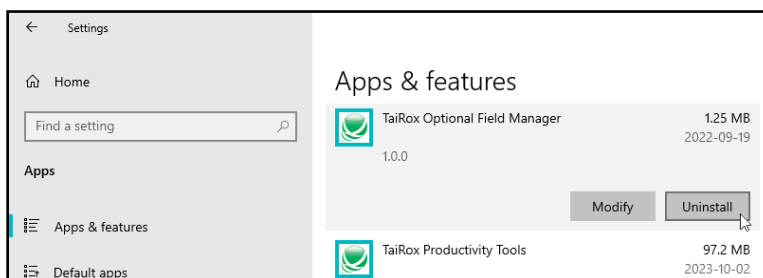
*SOX Backup Enterprise & Express has been replaced with Fast Database Management. See the User Guide for Fast Database Management for update instructions.

The following TaiRox products are “stand alone” products that can be safely updated using the following simple procedure:

- Automate G/L Consolidation
- Automate Recurring Entries
- Download Rates
- SOX User Management
- Copy Company
- Create Company
- Fast Clear History
- Fast Data Integrity
- Fast Database Management (unless updating from SOX Backup)
- Fast DB Tools
- Fast Duplicates Check
- Fast Units of Measure Tool
- Optional Field Manager

To update the above stand-alone TaiRox products:

1. Read the documentation that comes with your updated TaiRox software.
 - The new software may provide additional features that you want to use, or it may have new settings, special update considerations or update procedures.
 - We suggest that you test the software update procedure on a copy of your Sage 300 database before you install updates in your production environment – especially, if you are also updating Sage 300 or other 3rd party software products.
2. List all servers and workstations where the TaiRox products being updated are currently installed. In most cases, the software will be installed on a single computer.
3. Uninstall all instances of the TaiRox software products using the MS Windows Settings > Apps and Features program.



Ensure that you remove all copies of the TaiRox products that you are updating – from all servers and workstations where they are installed.

4. Install the new versions of TaiRox products on all servers and workstations where they were previously installed.
5. Check that the newly installed updates work as expected.

Update Notes:

- Some TaiRox products, such as Download Rates and Fast Database Management can be run interactively or as Windows Scheduled Tasks.

If you run these programs as Windows Scheduled Tasks, and want to change program settings after updating, *make sure that you load and update the XML settings files used by the scheduled tasks.* Users often update the wrong XML files and wonder why the scheduled tasks runs improperly.

- Fast Data Integrity includes two separate programs: Fast Data Integrity and Fast Data Integrity Console. Make sure that you uninstall both programs from all servers and workstations where they are installed.
- The Fast Database Management suite includes three separate programs: Fast Database Management, Fast Database Copy, and Fast DBTools. Make sure that you uninstall all three programs from all servers and workstations where they are installed.

Also note that Fast Database Management is the replacement product for SOX Backup Enterprise and SOX Backup Express.

If you are currently using with SOX Backup product, follow the update instructions in the Fast Database Management User Guide. It provides instructions for copying the SOX Backup license and updating a Windows Scheduled task if you previously used one.