



Sage 300 2022 Release Notes

Thank you for choosing a Sage business management solution.

These release notes contain important information about Sage 300, including information about product changes that are not in the documentation.

Depending on your purchase agreement, some features described here may not be available in your product.

What's new in Sage 300 2022

This section contains a summary of new features and changes in the 2022 release.

Integration Access Pack (IAP) licenses are no longer supported

For applications that previously used IAP licenses to access Sage 300 programs, a LanPak license is now used instead of the IAP License.

General improvements

This release includes the following new features and improvements in both Sage 300cloud web screens and Sage 300 desktop screens:

- **Enter negative additional costs on P/O credit notes.**
When entering a credit note on the P/O Credit/Debit Note Entry screen, you can now enter negative amounts for costs on the Additional Costs tab (for example, for shipping or restocking fees you paid as a result of returning an item). Such negative additional costs are recorded as debits when you run day-end processing.
- **Easily set the expected arrival date and location for all details on a purchase order.** Two new buttons are available on the Order tab of the P/O Purchase Order Entry screen:
 - **Set Arrival Date.** Clicking this button sets the expected arrival date for all details on a purchase order to be the same as the arrival date for the purchase order.
 - **Set Location.** Clicking this button sets the location for all details on a purchase order to be the same as the ship-to location for the purchase order.
- **Easily set the expected ship date and location for all details on an order.** Two new buttons are available on the Order tab of the O/E Order Entry screen:

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- **Set Ship Date.** Clicking this button sets the expected ship date for all details on an order to be the same as the expected ship date for the order.
- **Set Location.** Clicking this button sets the location for all details on an order to be the same as the default location for the order.
- **Reserve LanPak licenses for specific users.** A new **Reserve a LanPak License** option on the Users screen allows you to reserve one LanPak license exclusively for a user.

Information about reserved licenses (how many licenses are reserved, and how many reserved licenses are in use) is available on the Current Users screen.

Reserving LanPak licenses reduces the total number of licenses that can be used by other users, because a reserved license can be used only by the user for whom it is reserved.

- **Improvements to bank feeds.** On the Reconcile E-Statements screen:
 - When automatically reconciling transactions from a bank feed, the system now tries to match transactions in more ways than it did previously. Transactions will now match if certain information in Sage 300 is in the **Comment 2** field in the e-statement, even if the Comment 2 field includes additional information (for example, if the payment description in Sage 300 is **Check 900** and the Comment 2 field in the e-statement is **Invoice 2286 Goods - Check 900**).
 - Transactions downloaded using a bank feed have a Bank Cleared Date based on your local time.

Note: In web screens, the "local" time comes from the system where Sage 300 is running, which may be different from the time on your system.

- **Sage Data & Analytics.** If you use Sage Data & Analytics you can now start it from within Sage 300, in the following ways:
 - In desktop screens, click **Sage Data & Analytics** on the desktop ribbon.
 - In web screens, open it from **Business Intelligence Reporting** on the navigation menu.

To start Sage Data & Analytics as described above, you must enter your Sage Data & Analytics web address subdomain on the Company Profile screen (in a new **Web Address Subdomain** field). For more information, see [Company Profile Screen](#).

Sage 300cloud web screens improvements

This release includes the option to install Sage 300cloud web screens: modernized versions of Sage 300 screens that you can use in a web browser.

Web screens run in parallel with Sage 300 desktop screens, so there's no need to choose between desktop or web. Everyone in your organization can use the interface that best suits their needs, while working seamlessly with a single shared set of company data.

Here's a quick overview of what's new in Sage 300cloud web screens:

- **New Reminder List web screen.** This release includes a new Reminder List web screen that you can use to remind users to process scheduled tasks.
- **New G/L Chart of Accounts web screen.** This release includes a new Chart of Accounts web screen for General Ledger, which you can use to list accounts in the general ledger and view specific information for each account.
- **New A/R Customer List web screen.** This release includes a new Customer List web screen for Accounts Receivable, which you can use to extract customer information from your database.
- **Project and Job Costing web screens.** This release includes select Project and Job Costing web screens:

- **Cost Types.** Use this screen to define classifications for cost reporting that are not available by default.
- **Opening Balances.** Use this screen to enter opening balances so that you can transfer contracts to Sage 300.
- **Costs.** Use this screen to post miscellaneous cost transactions without affecting Accounts Payable.
- **Material Returns.** Use this screen to return unused materials (items) to Inventory Control.
- **Material Usage.** Use this screen to record costs of materials (items) used on a project. The costs of the materials are transferred from Inventory Control to the project.
- **Material Allocation.** Use this screen to reduce the amount of material stored for a project as the material is used.
- **Post Transactions.** Use this screen to post transactions to contracts.
- **Transaction Listing Report.** Use this screen to produce a record of your Project and Job Costing transactions.
- **Improved Finder.** The improved Finder that we introduced on some screens in Sage 300cloud 2021.2 is now available on all web screens. The redesigned Finder improves filtering and makes it easier to navigate through large sets of results. Improvements include:
 - When you open the Finder, initial selection criteria are set as follows:
 - If you have previously used the Finder in the particular context (say, for a specific field), it has the same selection criteria that you last used for the Finder in this context.
 - If you have never used the Finder in this context, selection criteria show all available records.
 - You can change the size of the Finder to make finding records easier. For example, making the Finder bigger lets you see more results at a time.
 - Keyboard shortcuts can be used to navigate through results and select records. For more information, see [Sage 300 Web Screens Keyboard Shortcuts](#).

To learn more about new web screens and features available in this release, see the following documentation and resources:

- [Sage 300cloud web screens online help](#)
- [Sage 300cloud web screens getting started guide](#)

Important! When using Sage 300cloud web screens over an external network or the internet, data must be protected with security measures such as Secure Socket Layer (SSL) or a Virtual Private Network (VPN). To determine appropriate security measures, consult with your information technology (IT) professional or Sage Business Partner.

Web screens are available in English, French, Spanish, and Chinese (Simplified and Traditional). Help and documentation for web screens is available in English and French.

Sage 300 desktop screens improvements

This product update includes the following new features and improvements in Sage 300 classic desktop screens:

- **Financial Reporter now supports Microsoft Excel 64-bit.**

Microsoft 365 integration with Sage 300

The Sage Contact app (for viewing and managing Sage 300 customer information within Microsoft Outlook) is no longer supported.

Technical information

This section provides information about program fixes, product contents and requirements, recommendations, and other technical information.

Sage 300 2022 program fixes

Sage 300 2022 includes program fixes for some problems that exist in the most recent previous version (Sage 300 2021 Product Update 2). The following sections describe these program fixes.

Signing in to Web Screens

Fixed a problem that could occur when signing in to Sage 300cloud web screens, which required you to sign in twice.

Accounts Receivable

- Fixed a problem on the Create Interest Batches screen that occurred if you have optional fields that are set up as required. Regardless of whether or not you entered information in these fields, an “optional field is missing” message appeared and prevented you from creating interest batches. (Reference #8008709438)
- Fixed a problem on the Receipt Entry screen in Sage 300cloud web screens, which could prevent you from viewing or modifying optional fields. (Reference #8008699063)

Accounts Payable

- Fixed a problem on the Clear History screen that prevented you from clearing history for fully paid documents. (Reference #8008608203)
- Fixed a problem in Sage 300cloud web screens that could occur on the Invoicing tab of the Vendors screen, which prevented you from entering information in the **Distribution Code**, **Distribution Set**, or **G/L Account** field (if one of these methods is specified in the **Distribute By** field). This problem occurred for vendors who are part of a vendor group that has no default method specified (on the Invoicing tab of the Vendor Groups screen) for distributing invoice amounts to general ledger accounts. (Reference #8008607790)

General Ledger

- Fixed a problem on the Create Allocation Batch screen in Sage 300cloud web screens, which could prevent you from making a selection in the **Create Batch For** field. (Reference #8008256472)
- Fixed a problem that occurred if you use multicurrency accounting, which caused incorrect exchange rates to be entered in G/L transactions for bank entries. (Reference #8008689707)
- In Sage 300cloud web screens, when you export the Transactions Listing report in Excel format, information on the report is aligned correctly. (Reference #8008805145)

Inventory Control

- If you select the **Allow Fractional Quantities** option on the I/C Options screen, when you save your changes you are asked to confirm that you want to allow fractional quantities. (Reference #8008728369)
- On the Lot Numbers Inquiry screen, the Lot Number Finder displays correct information in the **Quantity Shippable** and **Quantity On Order** fields. Previously, these fields displayed incorrect information if the **Use the Qty Ordered field in OE for the Allocation of Lot Numbers** option is selected on the Lots tab of the I/C Options screen, which also caused related data integrity check errors. (Reference #8008757900)

Order Entry

Fixed a problem that could prevent an item's unit price (specified in Inventory Control) from being automatically entered in the **Unit Price** field for details in O/E transaction entry screens. This problem occurred only if:

- On the Processing tab of the O/E Options screen, the **Default Order UOM** field is set to **Pricing Unit**.
- On the I/C Item Pricing screen, the item is set up as follows:
 - On the Prices tab, the **Base Price Type** field is set to **Base Price Calculated Using a Cost**.
 - On the Discounts tab, the **Selling Price Based On** field is set to anything other than **Discount** or **Markup on Markup Cost**.

(Reference #8008665468)

Sage CRM Integration

- In Sage CRM, you can enter and change information on the Customer Bill-To Address screen. (Reference #8008598406)
- In Sage CRM, the **Company A/R Promote** and **Company A/P Promote** security authorizations control which features users see for promoting customers and vendors to Sage 300:
 - Users with neither security authorization do not see the **Promote to Sage 300** tab.
 - Users with at least one of the security authorizations see the **Promote to Sage 300** tab where they can open the **Promote to Sage 300** screen, and on that screen they see the features they are authorized to use (for example, a user with **Company A/R Promote** security authorization sees features for promoting customers to Sage 300 but does not see features for promoting vendors).
- Fixed a problem that occurred if you changed the address for a company while promoting that company from Sage CRM to Sage 300, which prevented the address change from appearing in most Sage CRM screens (though the address change did appear in Sage 300).

General information

- Sage 300 2022 supports upgrades *only* from version 5.6 or later.
- If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in BX66A\WSSetup) on every workstation where you will view and use Intelligence Reporting screens.
- You require version 2022 (internally versioned as 6.9A) of all core programs that you plan to use.

If you use Canadian Payroll or US Payroll, you require version 7.3 of these programs with the most current tax updates.

Note: You must install Sage 300 before installing payroll programs.

- If you are upgrading from an earlier version, you must upgrade all Sage 300 programs to 2022 at the same time. Sage 300 2022 programs do not work with programs from earlier versions.
- If you have a subscription license, you don't need to enter serial numbers and activation keys for individual Sage 300 applications. When the License Manager appears during installation, the only license information you need to enter is your Client ID, Company Name, and Serial Number. Once you've entered this information, ensure that you have internet access, and then click **Refresh** to verify your subscription.
- If you do not have the following programs, which are required to use Sage 300, they are installed with Sage 300:
 - MSXML (Microsoft XML Core Services) 6.0
 - Microsoft SQL Server Native Client 11.0
 - Microsoft .NET Framework 4.6.2

- If you need to use the Sage 300 .NET Remoting Service, you must run the Web Deployment Wizard that is available on Sage Knowledgebase article [104304](#).
- Sage 300 2022 includes SP30 for SAP Crystal Reports® runtime engine.

If you use Sage HRMS or Sage Fixed Assets integrated with Sage 300, refer to the *Sage 300 2022 Compatibility Guide* for updated information on compatibility with Sage HRMS and Sage Fixed Assets. The *Sage 300 2022 Compatibility Guide* is available from Sage Knowledgebase article [26777](#).

- For the most current technical information about database and report changes, and about parameters for customizing printed forms, see *Sage 300 Database and Report Changes*, *Sage 300 Parameters for Customizing Printed Forms*, or Sage Knowledgebase article [68834](#).
- Product documentation for Sage 300 is available from the [Sage 300 Product Documents](#) website.

Compatibility with other programs

For a complete list of compatible programs, database platforms, and operating systems, see the *Sage 300 2022 Compatibility Guide*, available from Sage Knowledgebase article [26777](#).

Known issues

- When using the Notes screen on the Sage 300 classic desktop:
 - When adding or editing a note, the text editing area and toolbar appear only if you have enabled active scripting and scripting of Java applets in Internet Explorer security settings. For more information, see Sage Knowledgebase article [76898](#).
 - The Notes screen does not appear correctly if you use the **Medium - 125%** display size (specified in Windows control panel). For more information, see Sage Knowledgebase article [76926](#).
- When previewing reports in web screens, information in some reports is not aligned correctly. To work around this issue, export the report to PDF format. For more information, see Sage Knowledgebase article [76337](#).
- In some fields, Chinese language characters cannot be entered.

Installing Sage 300

For detailed instructions on installing Sage 300, see the *Sage 300 Installation and Administration Guide*.

Important!

- To avoid possible data corruption issues, if you upgrade to a later version of Sage 300 or Sage 300cloud, you must install all released product updates for that version **before** activating your data.

If you use Sage 300cloud web screens, you must also:

1. Activate data for all company databases that use the same system database before signing in to web screens.
 2. Run **IISRESET** as the Windows administrator user.
- Sage 300 Payroll 7.3 is compatible with Sage 300 2022. However, it must be installed separately.

Removing Sage 300

Before removing Sage 300, you must:

- Close all instances of the Sage 300 Desktop.
- Close all applications that integrate with Sage 300.
- Stop all Sage 300 services that are running, such as Sage 300 .Net Remoting Service.

To remove Sage 300 2022 programs:

1. In Windows' Control Panel, click **Programs And Features**.
2. Open Uninstall Or Change A Program, and then:
 - To remove all Sage 300 programs, double-click **Sage 300 2022**.
 - To remove individual Sage 300 programs:
 - a. Click **Sage 300 2022**, and then click **Change**. (Do not double-click Sage 300 2022.)
 - b. Click **Modify**, and then use the Select Features screen to select the programs you want to install and clear the selections for programs you want to remove.

Sage 300 Payroll

Sage 300 2022 includes Canadian and US Payroll. For more information, see the related release notes, which you can find on the [Sage 300 Product Documents](#) website.

Note: Canadian and US Payroll may not be available in all regions.

Sage 300 Intelligence Reporting

Sage 300 2022 includes Sage 300 Intelligence Reporting. For more information and help with getting started, see [Sage Intelligence Learning](#).

Known issues

- If you have multiple versions of Microsoft Excel installed, you may need to manually load the Report Designer Task Pane Excel Add-in.
- If you use exclusions in account and row set rules, exclusion accounts may appear when you drill down to balance.
- If Sage 300 Intelligence Reporting was installed by a user other than you (for example, an administrator), you must open Microsoft Excel before running reports in Report Viewer or Report Manager.
- In Report Viewer, an "Open File - Security Warning" message appears for every report you view. (This message should only appear once, when you first open Report Viewer.)
- If you use Microsoft Excel 2013, and you save a report template in Report Manager using **Save Excel Template**:
 - When you run the report in Excel, an "External Data" message may appear. You can proceed by clicking **Yes**.
 - If the report template has a timeline, the timeline does not retain its filters.

Sage Intelligence Reporting Cloud

Sage Intelligence Reporting Cloud is a financial reporting tool integrated with Sage 300cloud.

To use Sage Intelligence Reporting Cloud:

- You must customize some Sage 300 program files, and then you must reset IIS. For more information, see Sage Knowledgebase article [84722](#).
- Each user who will use Sage Intelligence Reporting Cloud must be assigned to a security group with **Financial Reporter** security authorization for Sage 300 General Ledger and **Sage 300 Web API** security authorization for Sage 300 Common Services.

We recommend that you configure Sage 300cloud web screens to run in a secured environment using digital certificates. If you do not, warnings will appear in your browser each time you start Sage Intelligence Reporting Cloud. For more information, see Sage Knowledgebase article [84797](#).

Sage 300 Software Development Kit

This section lists improvements and fixes for the Sage 300 Software Development Kit (for desktop screens) and the Sage 300 Web Software Development Kit (for web screens).

Sage 300 2022 improvements and fixes

- **Sage 300 Software Development Kit:**
 - Improvements to the view entry point **BrowseWithOffset**:
 - This entry point is now extendable, like all the other entry points.
 - On the base view, this entry point now works when it's subclassed.
 - In **fileFirstBase**, the template checks for the incorrect return code under JOIN_SUBCLASS.
- **Sage 300 Web Software Development Kit:**
 - Kendo is upgraded to 2021.1.224. The upgrade addresses a low security vulnerability issue and supports JQuery upgrade.
 - JQuery is upgraded to 3.6.0. The upgrade makes Sage 300cloud web screens more secure and includes fixes.
 - Simplified grid finder definition. Removed **FinderDefinition.CustomFinder** and **ColumnDefinition.HasFinder**. You can define a grid finder in a JSON configuration file by specifying **ColumnDefinition.Finder**, either inline or using **FinderDefinition.CustomFinderProperties** set to an object or function defined in another file.
 - Improved grid performance when loading large numbers of records. Added **GridDefinition.PageByKey** and **GridDefinition.ColumnsFromConfig** optional settings. If PageByKey is true, grid paging performance is improved at the cost of removing the following:
 - Total number of records count.
 - Page input from the grid pager.
 - The grid now supports multi-column headers by specifying column groups that incorporate inner column structures.
 - When retrieving information from the Sage 300 Web API, you can:
 - Use enum filtering to refine which records are found as results.
 - Specify what information is retrieved from the records that are found as results.

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