

Sage 300 2024

Upgrade Guide

May 2024



acutedata

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Last updated: May 23, 2024

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Overview

This Upgrade Guide provides instructions for upgrading earlier versions of System Manager and applications to Sage 300 2024. Review the following sections carefully to ensure that the upgrade proceeds smoothly:

- Minimum System Requirements
- Version Compatibility
- Upgrading from Version 5.5 or Earlier
- Applying for Activation Codes
- Before Upgrading to Sage 300 2024
- Upgrade Steps
- After Activating
- Configuring Sage 300 Web Screens

Refer to the Sage 300 2024 Release Notes for information about changes and new features in this version, and for supplementary information and information that was not available when this *Upgrade Guide* was published.

If you will be using Sage CRM with Sage 300, refer to the *Sage CRM Integration Guide* for system requirements and instructions on integrating Sage CRM with Sage 300.

Note: Depending on your purchase agreement, some features described in this guide may not be available in your product.

System Requirements

The information in this section was current when we released Sage 300 2024. If you do not find the information you need, see the [Compatibility Guide](#)

Server and Workstation Requirements

For a complete and up-to-date list of hardware and operating system requirements for workstations and servers, see the [Compatibility Guide](#)

- You must upgrade all programs that you use with Sage 300 to compatible versions.
- If you are using Sage CRM with Sage 300, see the *Sage CRM Integration Guide* for important information about version compatibility.
- The latest version of Payroll is 8.0. It must be installed separately.

Note: Sage Payroll requires Bank Services, Tax Services, and G/L Subledger Services.

Upgrading from Older Versions

You can upgrade your data directly to Sage 300 2024 from version 5.6 or any subsequent version. However, if you are using Sage ERP Accpac version 5.5 or earlier, you must update your data to version 5.6 before you can upgrade to version 2024.

Warning! You cannot use the 2024 version of System Manager to upgrade Sage ERP programs from version 5.5, or earlier.

Also, you cannot use version 5.6 of System Manager to upgrade Sage ERP Accpac programs from version 5.2, or earlier.

Attempting to do so will cause your system to crash, and will corrupt your data.

If you are using Sage ERP Accpac version 5.5, 5.4, or 5.3, you must update your data to version 5.6 before you install the 2024 version of System Manager. See the [Upgrade Guide](#) for version 5.6 for information about upgrading to that version.

If you are using Sage ERP Accpac version 5.2, or earlier versions, you must upgrade your database to an intermediate version (version 5.3, 5.4, or 5.5) *before you install System Manager version 5.6*. See the *Upgrade Guide* for the intermediate version for information about upgrading to that version.

Alerts and Warnings

Alert when Running Help

If you run Windows with your browser security set to High, you may receive the following message about Web page security when you try to open Sage 300 help:



To accept Sage 300 help as a trusted site, click the **Add** button.

Alert when Upgrading Sage 300 Intelligence Reporting

If you were using Sage Accpac Intelligence (SAI) with a previous version of Sage ERP Accpac, do not change the company database ID.

If you change the database ID, and then upgrade to Sage 300 2024 Intelligence Reporting, you may lose all the security roles set up for Intelligence Reporting in the previous version.

Alert when Migrating from Pervasive to Microsoft SQL

If you are migrating your database from Pervasive to Microsoft SQL, and your database contains Inventory Control items that use units of measure with the same name but with mixed cases (for example, both "EACH" and "Each," or another combination), we recommend that you choose a binary collation method for your SQL database. If you try to load data with mixed cases and you use a non-binary collation method, Database Load will fail.

Alternatively, you can repair your data, standardizing on one unit of measure, before using Database Load.

Applying for Activation Codes

You need activation codes to use Sage 300 products.

Note:

- You can run Sage 300 for up to **30 days** while you await your activation codes.
- You can obtain activation codes from the Sage Customer or Partner Portal.

If you are a Sage customer:

1. [Log in](#) to your account.

Note: If you don't have an account, use the self-registration tool on the Customer Portal login page to create one.

2. On the Support menu, click **Self Service**.
3. Click the **My Products** tab.
4. Follow the instructions that will appear, to display and print the Details Sheet.

If you need assistance with the Customer Portal, email Customer.Portal@sage.com, or call 1-877-828-6372.

If you are a Sage partner:

1. [Log in](#) to your account.
 - If you don't have an account, contact your company's portal administrator, or contact Sage.
2. Click **Customers > Details Sheet**.
3. Click **Show Advanced Search**.
4. Enter an account ID, and then click **Go**.
5. On the Details Sheet, click the **Products Details** tab to view the customer's activation codes.

If you need assistance with the Partner Portal, email Partner.Portal@sage.com, or call 1-877-828-6372

Before Upgrading to Sage 300 2024

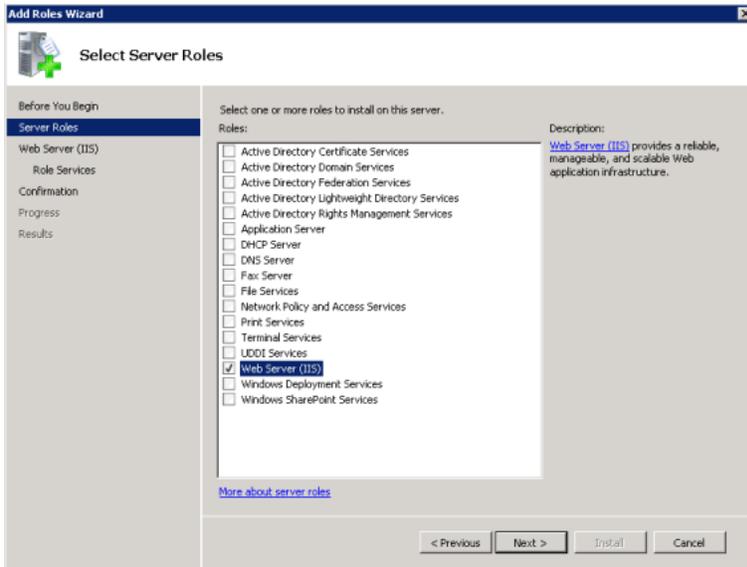
Perform the following steps, in order, before upgrading to Sage 300 2024. If you don't take these steps, you will not be able to activate your software.

For instructions on steps to take after upgrading, see "After Activating Applications" in this guide.

1. Make sure you have 2024 versions of all programs.
 - Make sure you have version 2024, or compatible versions, of all Sage 300 programs and other programs you use with Sage 300.
 - You must upgrade all Sage 300 programs at the same time.
2. Run Day End Processing (Optional).
 - Run Day End Processing in Inventory Control or, if you have a standalone Purchase Orders system, run Day End Processing in Purchase Orders.
3. Post Batches in Accounts Receivable and Accounts Payable (Optional).
 - Post all open batches in Accounts Receivable and in Accounts Payable.
4. Save Customized Reports, Macros, and Other Customizations.
 - Move customized reports to another folder, or they will be overwritten during the installation process.
 - For example, if you created customized financial reports in General Ledger, copy them from their current location (for example, **GL66A\ENG** to another location, and then copy them to **GL71A\ENG** after installing the upgrade.
 - Also, save macros and any other customizations to a new folder.
5. Install and Configure Internet Information Services
 - The Sage 300 web screens require Microsoft Internet Information Services (IIS). If you plan to use the web screens, ensure that IIS is installed before you install Sage 300.
 - If you need to install IIS, follow the instructions below.

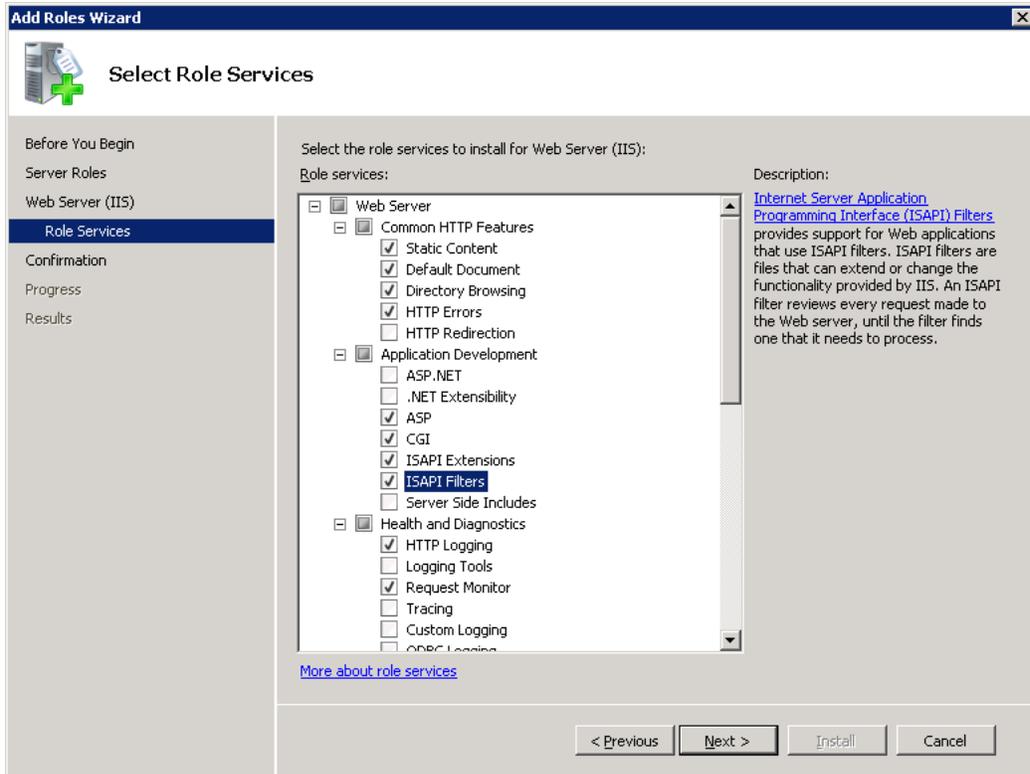
To install and configure IIS for Windows Server 2012 and 2016:

1. From Windows' Control Panel, click **Administrative Tools > Server Manager**.
2. In the Server Manager, under **Roles**, click **Add Roles**.
3. On the Select Server Roles page, click **Web Server (IIS)**, as shown in the following screen:



4. Click **Next**, and then select the following Role Services:
 - ASP
 - CGI
 - ISAPI Extensions
 - ISAPI Filters.

The Select Role Services page should appear as follows:

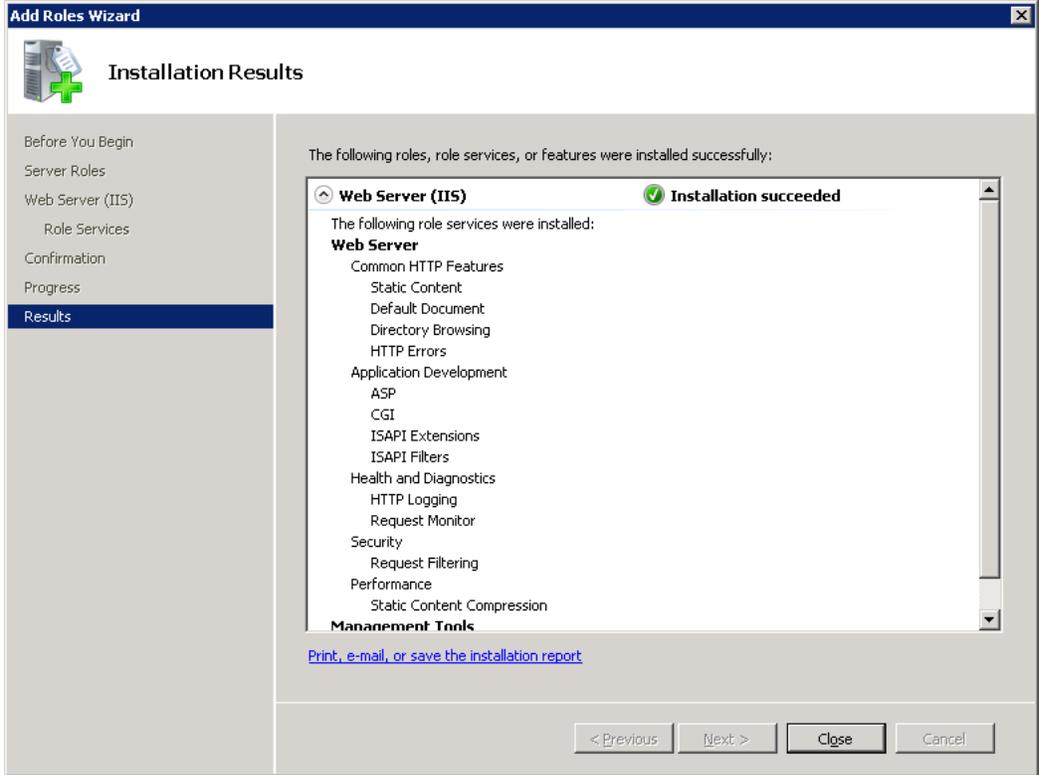


5. Click **Next**.

6. If the following prompt to install required services appears, click **Add Required Role Services**.



The Results page should appear, as follows:



Upgrading to Sage 300 2024

Before you proceed with the steps in this section, we strongly recommend that you:

- Check data integrity in your previous version, and correct any errors.
- Back up your data.

Important! If you are activating a new Sage 300 and/or Sage Payroll subscription, back up all existing Sage 300 program files and data, including all installed Payroll and other modules, before installing new programs and entering license information.

If your subscription is terminated, expires, or ends for any reason, you can restore your Sage 300 program files from the backup and continue to use that version of the software.

- Uninstall System Manager before installing the latest version to ensure a clean installation of the new version.

Install Sage 300 Programs

After you have performed the steps described in the previous section, you can install Sage 300 System Manager, System Manager Components, Sage 300 applications, the Sage 300 web screens, and any desired language packs.

You install Sage 300 components in one continuous process, consisting of two phases:

1. Installing Sage 300.
2. Entering license information.

Installing the Programs

1. Download Sage 300, and then double-click the ISO file.

If the installation screen does not appear automatically, go to the root directory (for example, d:\), and run AUTORUN.EXE.

2. On the installation screen, click **Sage 300**.

3. On the Sage 300 installation screen, click **Sage 300**.
4. On the Welcome screen, click **Next**.
5. Click the option to accept the license agreement, and then click **Next**.
6. Select the geographical region where you are installing the software, and then click **Next**.
7. For the client information, enter your 7-digit or 10-digit client ID and the company name to use for registration, and then click **Next**.
8. To provide additional information for registration, enter the names of the company contact, software dealer, and certified consultant, and then click **Next**.
9. Select the edition of Sage 300 you require, and then click **Next**.
10. Specify the names and locations of your program and data folders, and then click **Next**.

Note: To use web screens, you must specify the full path for the shared data folder (do not specify a mapped drive) and a local path for the programs folder (do not specify a mapped drive or a UNC path).

11. On the Select Features screen, select features and applications to install, and then click **Next**.

When installing the web screens, note that:

- Installing the web screens installs components required to support these screens.
- Before installing the web screens, you must have installed IIS, as described in “Step 5: Install and Configure Internet Information Services,” in the previous section.

Keep in mind that most of the applications require you to install others. All of the applications require core System Manager files.

The following list shows any additional requirements in parentheses for each application:

- Bank Services (Tax Services, G/L Subledger Services)
- General Ledger (Sage 300 Intelligence Reporting)
- Accounts Payable (Bank Services, Tax Services, G/L Subledger Services)
- Accounts Receivable (Bank Services, Tax Services, G/L Subledger Services)
- Inventory Control (G/L Subledger Services)

- Order Entry (Accounts Receivable, Inventory Control, Bank Services, Tax Services, G/L Subledger Services)
 - Payment Processing (Accounts Receivable, G/L Subledger Services, Bank Services, Tax Services, Order Entry, Sage Exchange)
 - Purchase Orders (Accounts Payable, Bank Services, Tax Services, G/L Subledger Services)
 - Project and Job Costing (Accounts Payable, Accounts Receivable, Bank Services, Tax Services, G/L Subledger Services)
12. On the next screen, in the **Program Folder** field, type the location on the Start menu where you want Sage 300 to appear, and then click **Next**.
 13. Click **Install**.

Once installation has finished, the License Manager appears. Follow the instructions in the next section to enter license information.

Entering License Information

After installation has finished, the Sage 300 License Manager appears if you have not already installed licenses for this version. Follow the instructions in the next section to enter license information.

In the Sage 300 License Manager, the License Information tab shows information entered during installation:

Note: If you use perpetual on-premise licenses then do not change the company name unless you need to change the business entity to which the programs are registered.

If you change the company name, the licenses will appear Unauthorized, until you apply for and enter new activation codes.

The process for entering Sage 300 license information differs depending on whether you have a subscription license or a perpetual license.

To enter Sage 300 subscription license information:

1. On the License Information tab, enter your serial number.
2. Click Refresh.
 - Required license information such as module name and expiry date is automatically entered and updated on the Licenses and Users tabs in the License Manager
3. Click Close.
4. Click Finish to close the Installation wizard.

To enter Sage 300 perpetual license information:

1. If you have activation codes for your Sage 300 programs, click the Licenses tab, then, for each Sage 300 program:
 - Double-click in the Serial Number column, and then enter the serial number.
 - Double-click in the Activation Code column, and then enter the activation code.
 - If you don't yet have activation codes, you can use the 30-day temporary licenses created during installation, and enter the permanent codes later.
2. If you installed Connector or Report Designer modules for Sage 300 Intelligence Reporting, enter their activation codes on the Licenses tab.

Note: The Report Manager, Report Viewer, and Connector programs are not available with a 30-day license. You must have a permanent license to use them. (Sage 300 comes with one free Report Manager license.)

3. Click the Users tab.
 - Right-click the grid, and then select Insert from the menu that appears. The new entry shows your current Sage 300 version and edition. If you already have a temporary LanPak license for the current version, select it so that you can enter activation information as described below.
 - In the new line, double-click the License Type column, and then select LanPak from the list.
 - Double-click in the Count column, and then type the total number of users who require Sage 300 access for this installation. (The count is the sum of existing users plus the new users for whom you're adding LanPak licenses.)

- If you have a permanent license for this version, and you are asked if you want to overwrite the existing license, click Yes.
- The system immediately deletes any existing LanPak licenses.
- Double-click in the Serial Number column, and then type the LanPak serial number that Sage provided.
- Double-click in the Activation Code column, and then type the activation code that Sage provided.
 - If you don't yet have an activation code, you can create a temporary license by leaving the activation code blank.
- Press Tab, or click elsewhere on the grid, to leave the field.
 - The system changes the Count to the purchased amount (if necessary) and enters Activated in the Activation Code field.

Important! You must record at least one LanPak license to use Sage 300.

4. For Sage 300 Intelligence Reporting, one Report Manager license for one user is free with Sage 300. If you have additional licenses for Report Manager and Report Viewer, enter their activation codes in the Activation Code column.
5. Click Close.
6. Click Finish to close the Installation wizard.
7. Restart the computer if asked at the end of the Installation wizard.

Install Product Updates

Before activating, check for available product updates for version 2024, and install any product updates you have not already installed.

Important! To avoid possible data corruption issues, you must install all released product updates for version 2024 before activating your Sage 300 applications.

Note: After installing a product update, if you use web screens, you must configure the Portal database again. For detailed instructions, see “Configuring the Sage 300 Web Screens.”

Upgrading from Sage 300 2023 Product Update 1(or earlier)

Starting with Sage 300 2023 Product Update 2, Sage 300 uses enhanced security features.

These features require two new databases, Vault and Store. These databases handle user security and authentication.

If you are upgrading from 2023 Product Update 1 or earlier, you must configure the Vault and Store databases in Sage 300 2024 before signing in to your companies.

Prerequisites:

Before you proceed with the Store and Vault creation wizard, please review the following prerequisites:

- Before proceeding, back up your Site folder within the Shared Data folder.
- Understand that the wizard will create two new MS SQL databases (Vault and Store).
- Be aware that Sage 300 security will always be on; unlike in previous versions of Sage 300, there is no option to turn off Sage 300 security. Users must always enter a password when they log in to Sage 300 (unless the user is using Windows Authentication).
- A minimum password length of 8 characters, and complex passwords with 1 lowercase character, 1 uppercase character, 1 numeric character and 1 special character are required.

Important! Before proceeding with the wizard, on the SQL Server computer, set the Minimum Password age to 0 (Refer to the How to set the Minimum Password Age section).

Configuring Vault and Store databases

To begin the Vault and Store Configuration, first open Database Setup:

1. On the Sage 300 server, On Windows' Start menu select All Programs > Sage 300 Admin Utilities > Database Setup.

The Sign-on form appears:

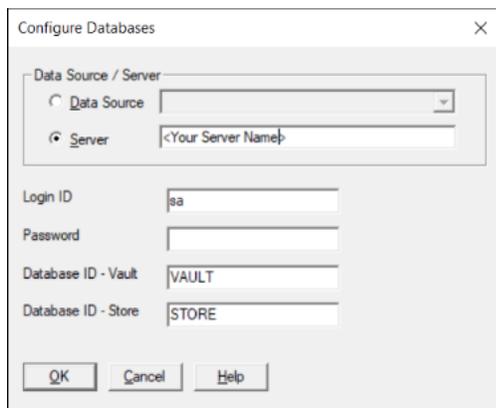


2. Sign in using the administrator (ADMIN) password.

Note: If Sage 300 is run before running the Database Setup screen, a dialog stating “No supported databases are set up.” is shown.

After logging into the Database Setup, the Configure Databases screen will be displayed.

This is the screen where the information about the Vault and Store databases is entered:



1. Enter the MS SQL Server name in the Server field or select an available Data Source
2. Enter the password for the MS SQL Server sa user
3. Select OK when complete

Alternatively, you can overwrite any of these values

1. Login ID: Ensure that the MS SQL login used has been assigned the “sysadmin” server role.
2. Database ID - Vault: Enter a database name for the Vault database. It must start with a letter and can contain letters, numbers or the ‘_’ character.
3. Database ID - Store: Enter a database name for the Store database. It must start with a letter and can contain letters, numbers or the ‘_’ character.

After creating the Store and Vault databases, you will be asked to change the ADMIN user's password if it is not already the minimum password length and a complex password.

Once the ADMIN user's password is sufficiently long\complex, login to Database Setup with this user and proceed to create your system and companies in Database Setup, following the next section.

Note: If you use web screens you will need to setup the Portal Database (see "Configuring Sage 300 Web Screens" (page 55 of the Administration and Installation Guide)).

Please see the guide [Enhanced Security for Sage 300 Release 2024](#) for more information about Enhanced Security in Sage 300 2024.

Upgrading from Sage 300 2023 Product Update 2 (or later)

Sign in to Database Setup and rerun the Portal Setup. (Refer to the Administration and Install Guide page 61.)

Activate Your Data for Version 2024 Applications

You must use the desktop program to activate Sage 300 applications, as follows:

1. In the Administrative Services folder, double-click **Data Activation**.
2. When asked whether you are ready to proceed with activation, click **Yes**.
3. In the Data Activation form that appears, select the check box for each application for which you want to activate data.

Note: If you use Sage 300 Payroll, the latest version of Sage 300 Payroll is 8.0.

The activation program automatically selects any applications that must be activated first, and then checks your data to ensure that it can activate them.

Most Sage 300 applications are interdependent. If you clear the selection for an application that others require, the activation program also clears the selection for the dependent applications. For example, if you clear the selection for Accounts Payable, but Purchase Orders and Project and Job Costing are selected, the program also clears

the selections for Purchase Orders and Project and Job Costing. (See “Step 1: Install Sage 300 Programs” for information about dependencies.)

Note: Sage 300 Options products are not part of the multi application data activation. If you select Sales Analysis, Ops Inquiry, or a number change program, you are prompted to activate that program immediately.

4. If you receive a message saying that you cannot activate an application at this time:
 - Close the Data Activation form.
 - Correct the problems described in the error message.
 - Reopen the Data Activation form, and continue the process.
5. Once you have finished selecting applications and entering required information, click the **Activate** button.

After Activating Applications

After activating applications, you should check data integrity for each application to ensure that the upgraded data contains no errors and perform the tasks described in the next sections.

Bank Services Update Notes

If the data integrity check found errors for Bank Services, you must refresh transactions for the affected banks, as follows:

1. Open the Reconcile Statements form.
2. For each affected bank:
 - In the **Bank Code** field, type the bank code, or use the Finder or the navigation buttons to display it.
 - Click **Calculate**.
3. Check data integrity for Bank Services again.

General Ledger Update Notes

If you have used account groups in version 5.6, note that in version 6.0, we modified the standard account groups that come with Sage 300. Therefore, you may need to reassign some of your existing accounts to new account groups, and assign the groups to the new group categories.

If you have not used account groups previously, note that the Account Groups form appears only if the **Use Account Groups** option is selected in the G/L Options form.

System Manager Update Notes

To let users open Sage 300 using their Windows signon ID, change the authentication method for each user in the Users form.

See the System Manager help for instructions on adding users and setting up security.

Sage 300 Intelligence Reporting Update Notes

Running Intelligence Reporting for the First Time

The first time you run Sage 300 Intelligence Reporting, you must log in as the Windows administrator.

A user with Windows administrator privileges must register the ActiveX component, **BICore.exe**, that Intelligence Reporting requires. To register this component, open any Sage 300 Intelligence Reporting form. Once the component is registered, other types of users can open these forms.

If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in **BX67A\WSSSetup**) on every workstation where you will view and use Intelligence Reporting screens.

Restoring Customized Reports and Settings from Your Previous Version

If you used Intelligence Reporting (formerly known as Sage Accpac Intelligence) with Sage ERP Accpac 5.6 or 6.0, restore your customized reports and settings by copying the **BXDATA** folder (backed up before activation) to the Sage 300 program folder.

Then, use the Bulk Import feature to import new reports from newer versions of Sage 300 Intelligence Reporting or from existing reports. Importing the new reports in this way ensures that your existing reports and settings are not deleted.

To import new reports:

1. Open Report Manager.
2. Enter the required connection information for your database, and then click **OK**.
3. In the Object window, do one of the following:
 - Click the **Home** icon. Then, on the Tools menu, click **Bulk Import/Update Reports**.
 - Right-click the **Home** icon, then click **Import/Update Reports** on the menu that appears.

4. On the Bulk Import/Update Reports form that appears, click **Yes** to import the new reports.
5. When the new reports are imported, they will co-exist with the backed-up (**BXDATA**) reports from the previous version

Configuring Sage 300 Web Screens

Before you can use the Sage 300 web screens, you must create a portal database using Microsoft SQL software. The portal database stores files used by the Sage 300 web screens.

Note: You must use Microsoft SQL Server (full or Express edition) to create your portal database.

If you are upgrading from Sage ERP Accpac 6.0:

- If you used Pervasive PSQL to create your portal database, you must recreate your portal database in Microsoft SQL Server. To create your portal database, follow the instructions in the *Sage 300 Installation and Administration Guide*.
- If you used Microsoft SQL Server to create your portal database, your database will be upgraded automatically for use with Sage 300 2023, and all existing settings will be preserved.

Normally, you create the portal database on the same server as your Sage 300 data. The portal database is shared by all companies in a Sage 300 installation, so you configure only one portal database.

Note: If you use SQL Server Express, you must configure a TCP/IP connection manually as described in the section “Configuring a Microsoft SQL Server Express Database.”

To configure the portal database:

1. From Windows’ Start menu, select **All Programs > Sage 300 > Database Setup**.
2. Click the **Portal** button to open the Configure Portal form.
3. Enter the following information on the Configure Portal form:
 - **Server Machine.** The default portal server that appears is the name of the machine on which you installed Sage 300. If you created your portal database on a different machine, enter the name of that machine instead.

- **Server Port.** Enter the TCP/IP port number specified in your database software for your portal database. The server port must be the HTTP port for SQL Server. (The default port number is 1433.)
- **Database Name.** Enter the name specified for the portal database in your database software.
- **User Name and Password.** Enter the user name and password specified for your database administrator in your database software. (They are not the credentials for the Sage 300 ADMIN User.)

Note: For a Microsoft SQL Database, you must supply credentials for SQL authentication. The portal database does not support Windows authentication.

4. Click **OK**.

Configuring a Microsoft SQL Server Express Database

The following instructions apply only to a Microsoft SQL Server Express portal database.

TCP/IP connections are not enabled automatically in SQL Server Express. Because the portal database requires a TCP/IP connection, you must set one up manually, as follows:

1. Open the SQL Server Configuration Manager.
2. Under the SQL Server Network Configuration tree, click **Protocols For SQLEXPRESS**.
3. For the TCP/IP protocol, select **Enabled**. (The default setting is **Disabled**.)
4. Right-click the TCP/IP protocol, click **Properties**, and then select the **IP Addresses tab**.
5. On the TCP/IP Properties screen, in the IPAll Section:
 - Clear the **TCP Dynamic Ports** field.
 - Set the **TCP Port** to 1433.
6. Restart the SQL Server.

Starting the Sage 300 Web Screens

Once you have activated the company data for version 2023 programs and configured the Sage 300 web screens as described in this guide, the web screens are ready to use.

To open web screens in a browser:

1. Visit <http://servername/sage300>, where `servername` is the server name or IP address of the server where Sage 300 is installed. If using https, then type <https://servername/Sage300>.
2. Enter your username and password.
3. Select a company.
4. Click **Sign In**.

What's New in Sage 300 2024

For detailed information about changes and new features in this version, see the *Sage 300 2024 Release Notes*, available on the Sage 300 Product Documents page:

<http://cdn.na.sage.com/docs/en/customer/300erp/Documentation.htm>



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