

Sage 300 ERP

# Sage 300 ERP 2014

What's New

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**sage**

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# What's New in Sage 300 ERP 2014

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Sage 300 ERP 2014 includes new features and improvements, including:

- **A new Current Users screen helps you optimize use of your LanPak license.** You can now get information about who is currently signed in to Sage 300 ERP, even if the maximum number of users for your LanPak license are signed in.
- **Fresh, modern look and feel.** We've redesigned the desktop and some frequently used screens to make it easier to find information and complete tasks.
- **Enhanced visual process flows.** You can now use process flows to manage more sophisticated workflows, by linking to programs, reports, macros, and other process flows.
- **Enhanced integration between Sage 300 ERP and Sage Inventory Advisor.** New fields in Inventory Control and Purchase Orders help you manage your inventory.

This article contains a summary of the new features and changes in Sage 300 ERP.

## In Product Update 3

### Changes and New Features in System Manager

- When exporting a report to an Excel file or a Rich Text Format (RTF) file, you can now specify options for the exported file.
- A new **Business Reg. No.** field on the Company Profile screen allows you to enter the business registration number for your company. This number is required for tax purposes in some jurisdictions (such as Malaysia and Singapore).

### Changes and New Features in Accounts Receivable

A new **Business Reg. No.** field on the Customers screen allows you to enter business registration numbers for customers. This number is required for tax purposes in some jurisdictions (such as Malaysia and Singapore).

## Changes and New Features in Accounts Payable

New fields allow you to enter numbers that are required for tax purposes in some jurisdictions (such as Malaysia and Singapore):

- On the Invoice Entry screen, an **Import Declaration Number** field allows you to enter import declaration numbers for imported goods.
- On the Vendors screen, a **Business Reg. No.** field allows you to enter business registration numbers for vendors.

## Changes and New Features in Purchase Orders

A new **Import Declaration Number** field on the Invoice Entry screen allows you to enter import declaration numbers for imported goods. This number is required for tax purposes in some jurisdictions (such as Malaysia and Singapore).

## Changes and New Features in Inventory Control

A new **Optimize Inventory** screen helps you optimize your inventory:

- Calculate optimal inventory quantities based on your sales data and a just-in-time inventory management model.
- Automatically update item reorder quantities to the optimal minimum and maximum.

Also, new options related to the Optimize Inventory screen have been added to other screens:

- A new **Optimizer** tab on the Options screen provides several options for the Optimize Inventory screen.
- On the Items screen, a new **Seasonal** option allows you to specify whether or not an item is seasonal.

## In Product Update 2

### Fresh, Modern Look and Feel

We've updated a selection of frequently used screens in Inventory Control to make it easier to find information and complete tasks:

- Redesigned buttons (such as the Zoom button and the Finder) are clearer and more meaningful.
- Required fields are now clearly indicated with an asterisk.

### Improved Help and Documentation

We've revised Bank Services and Tax Services help to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions.

We've also added the following new user's guides, available in Docs\62A\ENG:

- *Bank Services User's Guide*
- *Tax Services User's Guide*

This product update also includes French-language versions of:

- Accounts Payable help and the *Accounts Payable User's Guide*.
- Bank Services help and the *Bank Services User's Guide*.
- Tax Services help and the *Tax Services User's Guide*.
- G/L Consolidations help and the *G/L Consolidations User's Guide*.

### Changes and New Features in System Manager

- On the **Current Users** screen, the Administrator user can now forcibly sign out users.
- When printing to e-mail, you can now select recipients from your Microsoft Outlook address book.

## Changes and New Features in Accounts Payable

On both the Vendors screen and the Vendor Groups screen, the Statistics tab has been redesigned to provide more information. On these screens, the Statistics tab now displays the following:

- Detailed statistics for all periods in one year, which you select.
- Statistics for each year for which you have kept statistics.

## Changes and New Features in Inventory Control

- The Sales Statistics screen and the Transaction Statistics screen have been redesigned to provide more information. Both of these screens now display the following:

- Detailed statistics for all periods in one year, which you select.
- Statistics for each year for which you have kept statistics.
- Transaction entry screens (Adjustments, Assemblies/Disassemblies, Internal Usage, Receipts, Shipments, and Transfers) now include an **Entered By** field that indicates who entered the transaction.

## In Product Update 1

### Importing and Exporting

Sage 300 ERP now supports the xlsx file format that was introduced in Microsoft Excel 2007.

**Note:** If **Excel 2007** is not available as a file type when importing or exporting, you must install Microsoft Access Database Engine 2007. For more information, see Knowledgebase article 35473.

## Changes and New Features in Accounts Receivable

Transaction entry screens (Adjustment Entry, Invoice Entry, Receipt Entry, and Refund Entry) now include an **Entered By** field that indicates who entered the transaction.

## Changes and New Features in Accounts Payable

Transaction entry screens (Adjustment Entry, Invoice Entry, and Payment Entry) now include an **Entered By** field that indicates who entered the transaction.

## Changes and New Features in Purchase Orders

You can now create invoices and credit notes that have a total of zero.

## In the 2014 Release

### Changes in Installation

Sage 300 ERP Payroll 2014 (7.1A) is compatible with Sage 300 ERP 2014. However, it must be installed separately.

### Fresh, Modern Look and Feel

We've updated Sage 300 ERP 2014 with a fresh, modern look and feel to make it easier to find information and complete tasks:

- On the desktop:
  - Redesigned icons improve the experience of navigating to programs and screens.
  - A ribbon-style toolbar helps you find tools and commands quickly and easily.
- On a selection of frequently used screens:
  - Redesigned buttons (such as the Zoom button and the Finder) are clearer and more meaningful.
  - Required fields are now clearly indicated with an asterisk.

## Changes and New Features for Sage Advisor Product Enhancement Program

When you sign in to Sage 300 ERP 2014, you may be asked to update your user profile with your job role and email address. This information helps us:

- Design new features and improvements for Sage 300 ERP to help you work more effectively.
- Provide you with helpful information relevant to your job role, such as tips and suggestions to make your work faster and easier, or details about promotional offers.

You can view and change information in your profile (including job role and email) on the Users screen in Administrative Services.

To learn more about how information is collected and used for the Sage Advisor Product Enhancement Program, see the Sage Privacy Policy, available at [na.sage.com/Sage-NA/privacy-policy](http://na.sage.com/Sage-NA/privacy-policy).

## Changes and New Features in System Manager

System Manager 2014 includes the following new features and improvements:

- **Improved user management for LanPak and IAP licenses.** The **LanPak Users** and **IAP Users** screens have been combined into a new **Current Users** screen, which provides information about users who are currently signed in, helping you decide who to ask to sign out.

In addition to the information that was displayed in the **LanPak Users** and **IAP Users** screens, the **Current Users** screen displays:

- Contact information for users.
- Information about user activity, such as the screens each user is using.
- Information about users who are signed in without using a license, such as Timecard users.

Also, you can access the **Current Users** screen at any time, even if the maximum number of users for your LanPak or IAP license are signed in.

- **New job role and contact information fields on the Users screen.** Four new fields—**Job Role**, **Phone**, **E-mail 1**, and **E-mail 2**—allow you to specify a user's job role and contact information. Also, a new **User receives e-mail from Sage with information relevant to job role** option indicates whether a user consents to receive e-mail from Sage.
- **Sage 300 ERP 2014 now supports Microsoft Office 2013 32-bit.**

## Changes and New Features in Visual Process Flows

Sage 300 ERP 2014 includes the following new features and improvements for visual process flows:

- **Three new visual process flows.** We have added process flows for Canadian Payroll, US Payroll, and Project and Job Costing.
- **Enhanced Link feature.** When customizing process flows, you can now link elements to programs, reports, macros, and other process flows.

## Changes and New Features in Accounts Receivable

Accounts Receivable 2014 includes the following new features and improvements:

- **Improved help and documentation.** We've revised Accounts Receivable help to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions.

We've also added a new *Accounts Receivable User's Guide*, available in Docs\62A\ENG.

- **New options for Sage Billing and Payment customers.**
  - On the A/R Customers screen, the **Sage Billing and Payment Customer** option allows you to specify that a customer is a Sage Billing and Payment customer.
  - On the A/R Invoices screen, the **Include Sage Billing and Payment Invoices** option allows you to specify whether to print invoices created in Sage Billing and Payment.
  - On the A/R Statements/Letters/Labels screen, the **Include Sage Billing and Payment Customers** option allows you to specify whether to print statements for Sage Billing and Payment customers.

## Changes and New Features in Accounts Payable

Accounts Payable 2014 includes the following significant changes:

- **US tax forms updated.** The 1099 and 1096 forms have been updated to meet the following changed IRS specifications for 2013:
  - The alignment and positioning of some information has been changed so that it prints in the correct place on these forms.

- The 1099-MISC form now includes the following boxes:
  - 11 Foreign tax paid
  - 12 Foreign country or U.S. possession

## Changes and New Features in General Ledger

General Ledger 2014 includes the following new features and improvements:

- When printing the G/L Transactions Listing, you can now print a report that spans multiple fiscal years and periods.

## Changes and New Features in Inventory Control

Inventory Control 2014 includes the following new features and improvements:

- **A new Allow Duplicate Serial Numbers option on the Options screen.** This option allows you to specify whether multiple items can be assigned the same serial number.

**Note:** Clearing this option does not change existing assigned serial numbers, so any existing duplicated serial numbers remain.

- **A new Unit Cost field on the Lot Numbers Inquiry screen.** This field displays the unit cost for items in a lot, calculated based on the quantity of items in the lot and the total cost of the lot.
- **A new Use As Default option on the Bills of Material screen.** This option allows you to specify a default number to use for a BOM item when it is entered on the I/C Assemblies/Disassemblies screen. This information is also displayed on the Bills of Material report.
- **Four new fields enhance integration between Sage 300 ERP and Sage Inventory Advisor.**
  - On the **Location Details** screen:
    - **Inventory Minimum (SIA).** This field allows you to specify the minimum quantity of an item that must be in inventory at a location.
    - **Lead Time (SIA).** This field allows you to specify the lead time to allow when ordering goods.

- On the **Vendor Details** screen:
  - **Order Minimum (SIA)**. This field allows you to specify the minimum quantity of an item that you must order from a vendor.
  - **Preferred Vendor (SIA)**. If you purchase an item from multiple vendors, this field allows you to specify a preferred vendor for the item.

**Note:** Information in these fields is used only by Sage Inventory Advisor (SIA).

- On the Lot Numbers screen and the Serial Numbers screen, you can now change the stock date.

**Note:** If you change the stock date, the expiry date is recalculated automatically.

## Changes and New Features in Order Entry

Order Entry 2014 includes the following new features and improvements:

- You no longer need to edit the OERPT.INI file to switch between datapiped and non-datapiped invoice forms.
- You can now specify whether miscellaneous charges are discountable by default. To do this, you edit the **[ApplyInvoiceTermsDiscountToMiscCharge]** setting in the OE.INI file. For more information, see Knowledgebase article 21367.

## Changes and New Features in Purchase Orders

Purchase Orders 2014 includes the following new features and improvements:

- A new **Entered By** field on transaction entry screens (Requisition Entry, Purchase Order Entry, Receipt Entry, Invoice Entry, Return Entry, and Credit/Debit Note Entry) indicates who entered the transaction.

**Note:** On the Purchase Order Entry and Requisition Entry screens, the **Entered By** field replaces the **Source** field.

- You no longer need to edit the PORPT.INI file to switch between datapiped and non-datapiped purchase order forms.

- Two new fields on the Vendor Details screen enhance integration between Sage 300 ERP and Sage Inventory Advisor:
  - **Order Minimum (SIA).** This field allows you to specify the minimum quantity of an item that you must order from a vendor.
  - **Preferred Vendor (SIA).** If you purchase an item from multiple vendors, this field allows you to specify a preferred vendor for the item.

**Note:** Information in these fields is used only by Sage Inventory Advisor (SIA).

- If you do not allow negative inventory, you can now specify whether this setting is strictly enforced. To do this, you edit the **[NegativeInventory]** setting in the PO.INI file. For more information, see Knowledgebase article 21367.

## Changes and New Features in Sage 300 ERP Intelligence Reporting

Sage 300 ERP Intelligence Reporting 2014 includes the following new features and improvements:

- **Improved Report Designer with new Task Pane.** Report Designer now includes the Task Pane, which was previously available as an add-in. You use the Task Pane to create reusable pieces (Excel functions) that you can assemble to create a report. These pieces communicate with a powerful in-memory processing engine that significantly improves reporting speed and performance. Also, the Task Pane now supports alpha-numeric account number ranges.

The Layout Generator now uses the same in-memory processing engine as the Task Pane, resulting in similarly improved reporting speed and performance.

- **New row sets in Report Designer.** Reduce time spent editing rows in reports by defining customized rows that can be used in any report.
- **New financial reports.** Four new reports—Income Statement, Balance Sheet, Financial Ratios, and Financial Forecasting—are now available. These reports are similar to those available in Financial Reporter.
- **Fresh, modern look and feel.** Report Manager and Connector now have a ribbon-style menu that makes it faster and easier to find features. We've redesigned the Report Designer, Lock Report screen, and demonstration

reports to make it easier to find information and complete tasks. We've also standardized all icons and replaced the old "processing" image with a more informative progress bar.

- **Improved Report Manager.** Report Manager includes the following improvements:
  - Report property columns are now automatically sized so all text is displayed.
  - The report tree has been visually simplified to make it easier to resize.
  - Context menus are simpler and include options that are more relevant.
- **Improved Report Viewer.** The Report Viewer now opens at the same size as when it was last closed, and stays open when running reports.
- **Improved on-screen password security.** When entering a password in Security Manager, the password now appears as asterisks instead of the actual characters of the password.
- **Improved container import.** You can now rename a container during import (for example, if it has the same name as an existing container).
- **New report ID for union reports.** The new report ID makes it easier to identify reports to include in a union report.
- **Support for Microsoft Excel 2010 64-bit Edition.**
- **Support for Microsoft .NET Framework 4.0.** Benefits include faster installation and improved stability and experience when using Excel.
- **Ability to disable Direct Query tool.**
- **Ability to restrict access to reports based on Security Manager roles.**

## Changes and New Features in Sage CRM Integration

Sage 300 ERP 2014 Integration with Sage CRM 7.2 includes the following changes:

- **Windows Server 2003 is no longer supported.** Sage CRM 7.2 supports only Windows Server 2008 R2 and above.
- **Sage CRM Solo is no longer supported.**

For information about new features in Sage CRM 7.2, see the Sage CRM Community website: [https://community.sagecrm.com/user\\_community/m/72\\_documentation/default.aspx](https://community.sagecrm.com/user_community/m/72_documentation/default.aspx)

For a complete list of customer-facing changes and upgrade information for Sage CRM integrated with Sage 300 ERP, see the *Sage CRM Integration Upgrade Guide*.

For system requirements and instructions on setting up Sage CRM integration with Sage 300 ERP, see the *Sage CRM Integration Guide*.

## Improved Help and Documentation

We've revised help for the following Sage 300 ERP programs to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions:

- Accounts Receivable
- Accounts Payable
- G/L Consolidations
- Intercompany Transactions

We've also added the following new user's guides, available in Docs\62A\ENG:

- *Accounts Receivable User's Guide*
- *Accounts Payable User's Guide*
- *G/L Consolidations User's Guide*
- *Intercompany Transactions User's Guide*

This release also includes French- and Chinese-language versions of Inventory Control help and the *Inventory Control User's Guide*.