Sage 300 2017

What's new

March 2017

What's new in Sage 300 2017

Sage 300 2017 includes new features and improvements, including:

- New financial management, operation management, and administration web screens, as well as improvements to many existing web screens.
- A new Notes feature lets you add and manage notes for customers, vendors, and inventory items.
- One-click processing for credit card transactions in Accounts Receivable and Order Entry.
- UI Profiles allow user-specific customization of Sage 300 web screens.
- A new Inquiry feature makes it easy to look up Accounts Receivable documents.

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

Some features described in this guide may not be available in your Sage 300 system.

Product Update 2: General Improvements

The following new features and enhancements are available in both Sage 300c web screens and Sage 300 classic screens.

Improved Item Finder

The Item Finder now includes the following information:

- Quantity Available
- Quantity Committed
- Quantity on Hand
- Quantity on Purchase Order
- Quantity on Sales Order
- Preferred Vendor (name and number)
- Preferred Vendor Item Number

Easier setup for printing to email

A new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings.

Company Profile

| Address | Options | Email |

Settings

Server Name
smtp.server.com

Server Port
25

Use SSL
Yes ▼

Username
ADMIN

Password
•••••

From Email Address
test@email.com

Send Test Email

To
test@email.com

Send Test Email

Save

More flexibility to change National Accounts

In Accounts Receivable, you can now change the national account for a customer even if there are outstanding transactions for the customer.

Improved Help menu

The Help menu has an improved design, including several new options, to get you to the appropriate help resource when you need it.

Improved validation on P/O Receipt Entry screen

In Purchase Orders, the Receipt Entry screen now prevents you from entering duplicate invoice numbers for the same vendor.

Import templates

New import template files show the minimum fields required for various record types (such as A/R customers or I/C items). The data in these templates are based on Sage 300 Sample Data. Import templates can be found in the ImportTemplates folder in the Sage 300 Shared Data folder.

Improved error messages in day-end processing

If a problem occurs during day-end processing, improved messages help you identify the cause of the problem.

Product Update 2: Sage 300c web screens

If you use Sage 300c web screens, the following new web screens and features are available.

For information about using the new web screens and features, see the online help at:
help.sage300.com

New Order Entry web screens and features

This release includes the following new Sage 300c web screens for Order Entry:

- **Invoice Entry.** Use this screen to enter and manage invoices.
- **Shipment Entry.** Use this screen to enter and manage shipments.
- **Capture Payments with Invoices.** Use this screen to capture and invoice pre-authorized credit card payments for multiple orders or shipments.

Improved navigation in tables

You can now navigate around table cells and rows using the arrow keys on your keyboard.

Easily look up Accounts Receivable documents

A new Inquiry feature makes it easy to look up A/R documents. This feature is available from the web toolbar, the A/R Customers screen, and some transaction entry screens in Accounts Receivable and Order Entry.

Inquiry - A/R Documents

▼ Filter						
Document Number ▾	Contains ▾	IN	🔍			Apply

Customer Number	Currency Code	Document Type	Document Number	Number of Paym...	Document Date	Due Date
1200	**USD**	**Invoice**	IN00000000000... ✎	**1**	**6/30/2020**	**7/5/2020**
1200	USD	Invoice	IN00000000000... ✎	1	6/30/2020	7/5/2020
7200	USD	Invoice	IN00000000000... ✎	1	6/30/2020	7/30/2020
1105	USD	Invoice	IN00000000000... ✎	1	7/30/2020	8/29/2020
1200	USD	Invoice	IN00000000000... ✎	1	7/30/2020	8/5/2020
1400	USD	Invoice	IN00000000000... ✎	1	7/30/2020	8/29/2020
7100	USD	Invoice	IN00000000000... ✎	1	7/30/2020	8/29/2020
7200	USD	Invoice	IN00000000000... ✎	1	7/30/2020	8/29/2020
1600	USD	Invoice	IN00000000000... ✎	1	7/30/2020	7/30/2020
7300	USD	Invoice	IN00000000000... ✎	1	8/12/2020	8/12/2020

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Tax-related fields for Malaysia and Singapore

The following fields, which are required for tax purposes in some jurisdictions (such as Malaysia and Singapore), are now available in Sage 300c web screens:

- **Business Registration Number.** This field allows you to enter business registration numbers for your company, customers, and vendors. It appears on the Company Profile, A/R Customers, and A/P Vendors screens.

- **Import Declaration Number.** This field allows you to enter import declaration numbers for imported goods. It appears on the P/O Invoice Entry screen.

Check customer credit status

A new Credit Status tab on the A/R Customers web screen displays credit status, outstanding balances, and other credit-related information for customers and national accounts. (This information was previously available only on the A/R Customer Inquiry screen in Sage 300 classic screens.)

A/R Customers

Options ⚙   **Create New**

Required *

Customer Number *   **Customer Name**

1100   Bargain Mart - San Diego

| Address | Contact | Processing | Invoicing | Optional Fields | Statistics | Activity | Comments | Credit Status | Inquiry | ▼ |

Customer Credit Status

Outstanding A/R Balance:	3,329.10
A/R Pending Balance:	0.00
O/E Pending Balance:	0.00
Other Pending Balance:	0.00
Total Outstanding Balance:	**3,329.10**

National Account Credit Status

Outstanding A/R Balance:	7,167.61

Age By
(None) ▼

Age As Of
3/6/2017

Cutoff Date
3/6/2017

☑ Include Prepayments   Apply

From	To	Amount Due
Current		0.00
1	30	0.00
31	60	0.00
61	90	0.00
Over	90	0.00

Number of Open Invoices
8

Total Invoices Paid
0

Total Days to Pay
0

Average Days to Pay
0.0

Outstanding Retainage
0.00

Delete   **Save**

Sage 300 Web API security authorizations

To give you more control over access to Sage 300 Web API features, a new **Sage 300 Web API** security authorization is available for Common Services, Bank Services, Tax Services,

General Ledger, Accounts Receivable, Accounts Payable, Inventory Control, Order Entry, and Purchase Orders.

Product Update 2: Sage 300 classic screens

The following new features and improvements are available in Sage 300 classic screens.

Easier setup and new SMTP option for printing to email

A new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings for Sage 300 classic screens. You can send email using Microsoft Outlook, or you can select the new **Use SMTP** option to use an SMTP (Simple Mail Transfer Protocol) service to send documents via email.

Customize how Order Entry handles price and credit limit overrides

The OE.INI file includes a new **UsernamePasswordToOverride** customization option, which lets you specify how unit price limit overrides and credit limit overrides are approved in O/E transaction entry screens. For more information, see https://support.na.sage.com/selfservice/viewdocument.do?externalId=21367.

Product Update 1: Sage 300c web screens

If you use Sage 300c web screens, the following new web screens and features are available.

For information about using the new web screens and features, see the online help at: help.sage300.com

Sage Intelligence Reporting Cloud

This release includes Sage Intelligence Reporting Cloud, a business intelligence solution that helps you gain better visibility into your business with dynamic financial reports that you can export and customize in Microsoft Excel or Excel.

Sage Intelligence Reporting Cloud runs on your Sage 300 server. Reports are generated using Microsoft Excel XLSX files, so you can save them on your computer, view them on

mobile devices, or use web applications such as Microsoft Office Online to configure and generate reports in a web browser.

New General Ledger web screens and features

This release includes additional web screens from General Ledger (Account Permissions and Create Revaluation Batch) that you can use to set up account permissions and manage currency revaluation.

User-specific customization of web screens and the Reports list

This release includes a new UI Profiles web screen that you can use to define groups of users (you create a UI profile and then assign users to it).

UI profiles allow you to customize Sage 300 for each user, by specifying:

- **Which custom reports appear on the Reports list.** When adding a report link to the Reports list, you specify which groups of users (UI Profiles) will see the report.

- **Which fields and controls appear on screens, and what labels appear for fields and controls.** When customizing a web screen, you specify which groups of users (UI Profiles) will see the customized version of the screen.
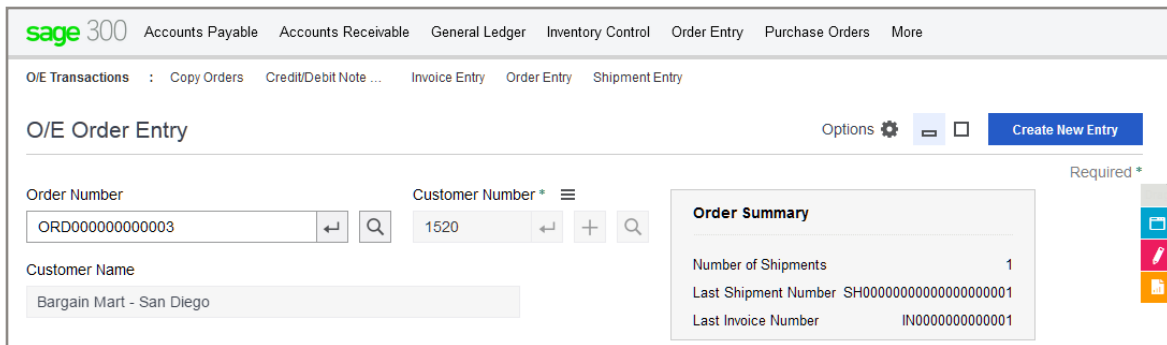
Import and manage customizations for web screens

If you or your Sage business partner use the Sage 300 Web Screens SDK to create customizations for web screens, new administration screens enable you to import customization packages and manage individual customizations.

For more information, see the *Sage 300 Web Screens Getting Started Guide*.

Redesigned toolbar and menus give you more space

We've improved the design of the web screens toolbar and menus to give you a little more room to work. And if you need to free up more space, you can scroll down to temporarily hide the top toolbar and rearrange the menus in a more compact layout.

Product Update 1: Sage 300 classic screens

We've added a **Live Chat** button to the ribbon on the Sage 300 desktop to make it easier for you to contact our friendly support team.
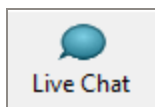
2017 release: Sage 300c web screens

If you use Sage 300c web screens, the following new web screens and features are available.

For information about using the new web screens and features, see the online help at:
help.sage300.com

Redesigned web screens help you get more done

We've made a number of design enhancements to improve workflow and efficiency on frequently used web screens so you can get more done.

- **Easily hide infrequently used fields and controls on key transaction entry screens.** We've organized fields and controls on frequently used transaction entry screens into collapsible sections, making it easy to hide the fields and controls you use less often.

The following screens have been redesigned to include collapsible sections:

- **Accounts Payable:** Invoice Entry and Payment Entry.

- **Accounts Receivable:** Invoice Entry and Receipt Entry.

- **Order Entry:** Order Entry.

- **Scroll less, see more.** Fields and controls have been organized on most transaction entry screens so you can see more without scrolling.

- **See and use more columns in data entry tables.** Detail entry tables are wider on transaction entry screens, so you can see and use more columns without scrolling.

Smarter, simpler processing for credit card transactions

If you use Payment Processing:

- New buttons appear on Sage 300 web screens you use to process credit card transactions, enabling you to process transactions with one click.

Quick Pre-authorize

This button appears on the O/E Order Entry screen.

Quick Charge

This button appears on the following screens:

- A/R Prepayments (which you open from the A/R Invoice Entry screen)
- A/R Receipt Entry
- O/E Prepayments (which you open from the O/E Order Entry screen)

> **Note:** The **Pre-authorize** and **Charge** buttons are still available for situations when you need full control over transaction details.

- In Accounts Receivable, a new Process Credit Card Payments screen allows you to process credit card payments from your customers for multiple invoices.

A/R Process Credit Card Payments

Invoices Due On or Before

6/6/2020 [calendar] ☑ Print Receipts After Processing Payments

	From	To
Customer Number	[Q]	[Q]
Customer Group	[Q]	[Q]
Invoice Number	[Q]	[Q]
Processing Code	[Q]	[Q]
Terms Code	[Q]	[Q]

Apply

⫴ Edit Columns

Apply	Processing Code	Invoice Number	Customer Number	Customer Name	Payment Number	Current Balance
Pending	PUSD2	IN0000000000003	1105	Bargain Mart - ...	1	188.79
Yes	PUSD2	IN0000000000008	1105	Bargain Mart - O...	1	188.79
Yes	PUSD2	IN0000000000025	1105	Bargain Mart - O...	1	687.82
Yes	PUSD2	IN0000000000037	1105	Bargain Mart - O...	1	1227.12
Yes	PUSD2	TR-INV-002	1105	Bargain Mart - O...	1	1016.48
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	1	7783.29
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	2	4393.70
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	3	2929.14
Yes	PUSD	TR-CRE-006	1200	Mr. Ronald Black	1	264.61
Pending	PUSD	TR-INV-003	1200	Mr. Ronald Black	1	105967.65

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Apply None **Restore Defaults** **Process Payments**

- On the Payment Processing Options screen, a new **Allow Terms Discount on Credit Card Receipts** option allows you to specify whether terms discounts (as specified on invoices) are available on the A/R Process Credit Card Payments screen.

- On the A/R Credit Card Information screen, a new **Approved for Automatic Payments** option indicates whether a customer has given you formal approval to charge their default credit card automatically (without contacting them) when invoices are due.

> **Note:** To use a credit card on the new A/R Process Credit Card Payments screen, both the **Approved for Automatic Payments** option and the **Use This as Default Card** option must be selected for the card.

- You can now process payments using smart cards (credit cards that have a built-in chip).

Add and manage notes for customers, vendors, and inventory items

Use the web toolbar to add notes to customers, vendors, and inventory items, and to manage notes, in the handy new Notes panel.


Create shortcuts to customized reports

If you use customized SAP Crystal Reports®, a new Reports list lets you create a list of links to the custom reports you and your team use most often.
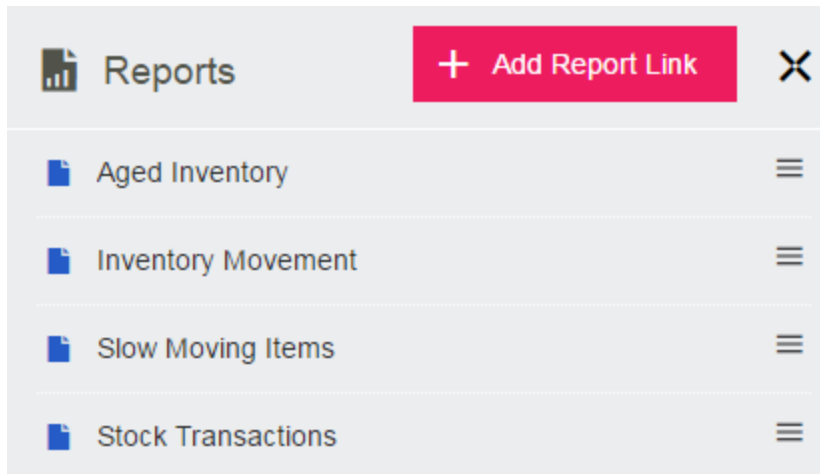
Customize fields and controls on web screens

Administrative users can use a new **Customize** option to show and hide fields and controls, and to change text labels for fields and controls, on most web screens.
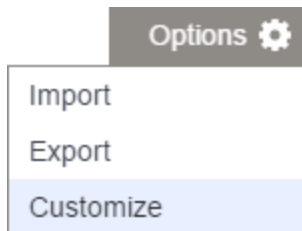
New Financial Management web screens and features

This release includes additional web screens from General Ledger, Accounts Payable, and Accounts Receivable that you can use to create accounts and to enter, manage, inquire on, and process transactions and transaction batches.

The following web screens are now available:

- **G/L Accounts:** Create Accounts, Transaction History.

- **A/P Transactions:** Adjustment Entry, Adjustment Batch List.

- **A/R Transactions:** Process Credit Cards, Quick Receipt Entry, Receipt Inquiry, Refund Entry, Refund Inquiry, Refund Batch List, Adjustment Entry, Adjustment Batch List.

- **A/R Periodic Processing:** Update Recurring Charges.

On the A/P Invoice Entry screen, a new **Import Declaration Number** field allows you to specify an import declaration number for an invoice.

New Tax Services web screens

This release includes new web screens from Tax Services (Tax Clear History and Tax Tracking Report) that you can use to manage and report on tax information.

New Bank Services web screen

This release includes a new Bank Credit Card Types web screen that you can use to add and manage credit card types in Bank Services.

New Administration web screens

This release includes new web screens from Administrative Services (User Authorizations and Security Groups) that you can use to manage users and security.

Faster, more convenient transaction posting

Batch list and transaction entry screens in General Ledger, Accounts Payable, and Accounts Receivable have been updated to make it easier to post transactions.

- Most batch list screens in General Ledger, Accounts Payable, and Accounts Receivable now include a **Post All** button.
- Most transaction entry screens in Accounts Payable and Accounts Receivable now include a **Post** button.
- The Reconcile Statements screen in Bank Services now includes a **Post** button for posting bank reconciliations.

Drill down to posting journals and posting errors from batch list screens

Batch list screens in Accounts Payable and Accounts Receivable have been updated to support drilldown to posting journals and posting error reports.

On most batch list screens in Accounts Payable and Accounts Receivable:

- A new Edit button in the Posting Sequence column opens the Posting Journals report for the selected batch.

- A new Edit button in the Number of Errors column opens the Posting Errors report for the selected batch.

New Web API for developing integrated services

A Sage 300 Web Application Program Interface (API) is now available as part of the Software Development Kit (SDK) for members of the Sage Development Partner Program.

The Sage 300 Web API makes it easier than ever to develop services that integrate with Sage 300 data and business logic. You can use the Web API to create integrated services for Sage 300 using many frameworks and tools—even just a web browser.

This release of the Web API includes a limited set of initial features, with additional features planned for future product updates and releases.

To download documentation and get started, see Sage Knowledgebase article 75211.

For more information about partner programs, visit sage.com/us/partners.

2017 release: Sage 300 classic screens

The following new features and improvements are available in Sage 300 classic screens.

Add and manage notes for customers, vendors, and inventory items

A new **Notes** button on the Sage 300 desktop toolbar lets you add and manage notes for customers, vendors, and inventory items.

For more information, see the "Adding and Managing Notes" topic in the System Manager Help.

Changes and new features in System Manager

On the Licenses tab of the License Manager, a new **Count** column displays the maximum

number of employees for a product subscription. If you have a Sage Payroll subscription, this column displays the number of employees for whom you can calculate payroll.

> **Note:** A count of 999 indicates that you can calculate payroll for an unlimited number of employees.

Changes and new features in Accounts Receivable

If you use Payment Processing:

- A new **Quick Charge** button enables you to process credit card payments with one click. This button appears on the following screens:
  - Prepayments (which you open from the Invoice Entry screen)
  - Receipt Entry

> **Note:** The **Charge** button is still available for situations when you need full control over transaction details.

- A new **Process Credit Card Payments** screen allows you to select pending invoices for multiple customers and process payments for those invoices with a single click. Previously, it was possible to process credit card payments for only one customer at a time.

- A new **Approved for Automatic Payments** option on the Credit Card Information screen indicates whether a customer has given you formal approval to charge their default credit card automatically (without contacting them) when invoices are due.

> **Note:** To use a credit card on the new Process Credit Card Payments screen, this option must be selected for the card.

Changes and new features in Order Entry

- If you use Payment Processing, the following new buttons enable you to pre-authorize or process credit card payments with one click:
  - **Quick Pre-authorize.** This button appears on the Order Entry screen.
  - **Quick Charge.** This button appears on the Prepayments screen, which you open from the Order Entry, Shipment Entry, or Invoice Entry screens.

> **Note:** The **Pre-authorize** and **Charge** buttons are still available for situations when you need full control over transaction details.

Changes and new features in Payment Processing

- Sage Exchange Desktop 2.0 allows you to process payments using smart cards (credit cards that have a built-in chip).

> **Important!**
> - You must install Sage Exchange on every workstation you will use to process credit card transactions.
>
>   To download Sage Exchange, visit
>   https://www.sageexchange.com/install/sageexchangedesktopbootstrapper.zip.
> - If you have Sage Exchange Desktop 1.0 installed, you must uninstall it before you can install Sage Exchange Desktop 2.0.

- On the Options screen, a new **Allow Terms Discount on Credit Card Receipts** option allows you to specify whether terms discounts (as specified on invoices) are available on the A/R Process Credit Card Payments screen.

Changes and new features in Sales Analysis

If you use Technisoft Service Manager, Sales Analysis now supports Cost Only transactions.

> **Note:** Cost Only transactions that were processed before you installed Sage 300 2017 are not included automatically in Sales Analysis, but can be flagged for retrieval. For more information, see Knowledgebase article 74010.

Changes and new features in Sage 300 Intelligence Reporting

New reports are available via the Report Utility. For more information, see
https://www.sageintelligence.com/report-utility/sage-300.