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Sage 300 2021 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.

Product updates contain modified versions of one or more Sage 300 program components. A product update is not a full upgrade or a product replacement. Each product update is valid only until we release the next product update or the next version of Sage 300.

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

What's new in Product Update 1

This section contains a summary of new features and changes in Product Update 1.

General improvements

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

- **Updated 1099 tax reporting.** For tax year 2020, Nonemployee Compensation is reported in box 1 on a new 1099-NEC form (instead of box 7 on the 1099-MISC form where it was reported previously). On the **A/P Print 1099/1096 Forms** screen, you can now print to the new 1099-NEC form, as well as updated versions of the 1099-MISC and 1096 forms.

- **Improved 1099/CPRS codes.** 1099/CPRS codes no longer correspond to specific box numbers on forms, because these box numbers may change from year to year (which has happened with several boxes in tax year 2020, including the change to Nonemployee Compensation discussed above).

Instead of using the code as an indication of the box number where amounts should be reported, for each code you now specify a type of payment (or other amount) to be reported on 1099/CPRS forms. When you print a form for a specific tax year, amounts are automatically printed in the correct boxes for that year.

To continue using your existing 1099/CPRS codes, update each of them by specifying a tax reporting type (1099 or CPRS) and an amount type. Also, consider creating 1099/CPRS codes with meaningful names for your next

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reporting cycle (for example, if you currently use code **7** for Nonemployee Compensation, you might replace this code with one named **NEC**). If you create new codes, ensure that you assign them to vendors in Accounts Payable.

Sage 300cloud web screens improvements

This product update includes the following new features and improvements in Sage 300cloud web screens:

- **Improved data integrity checking for integrated products.** For some third-party products that integrate with Sage 300, you can specify options to refine data integrity checks.

Sage 300 desktop screens improvements

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

- **Updated visual process flows.** We have redesigned Visual Process Flows so they no longer require Adobe Flash, because Flash will not be supported after December 2020. This release includes updated versions of the process flow templates that were available previously. You can use these templates as well as any custom process flows that you already have. However, in this release you cannot create or change custom process flows. The ability to customize process flows will be restored in a future release.

  Also, some things in your custom visual process flows may be different or missing. For details, see Sage Knowledgebase article 107531.

What's new in Sage 300 2021

This section contains a summary of new features and changes in the 2021 release.
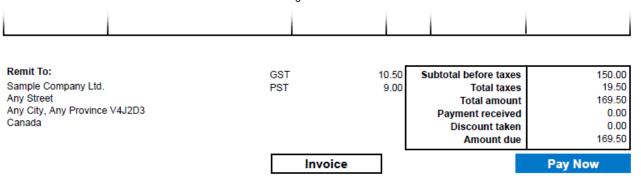
Stronger default security settings

When you install Sage 300 2021 new (rather than upgrading from a previous version of Sage 300), security is turned on by default. User passwords must include both letters and numbers, and be at least 8 characters long.

> **Note:** During initial setup, you must change the password for the Sage 300 administrator user, because the default password does not meet the password complexity requirements.

General improvements

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

- **Accept payments through online providers.** You can now accept payments from your customers through online payment service providers such as PayPal and Stripe. If you use this feature, invoices include a Pay Now button that your customers can click to pay using any online provider you have set up for your company in Sage 300. For more information, see Accepting Payments Through Online Providers.

Remit To:	GST	10.50	Subtotal before taxes	150.00
Sample Company Ltd.	PST	9.00	Total taxes	19.50
Any Street			Total amount	169.50
Any City, Any Province V4J2D3			Payment received	0.00
Canada			Discount taken	0.00
			Amount due	169.50

Invoice   **Pay Now**

- **Withholding taxes for sales.** In Tax Services, in addition to withholding taxes for purchases, you can now set up withholding taxes for sales. A withholding tax for a sale is applied when selling goods or services to a customer, and allows you to record amounts (some or all of either the selling price or the tax amount) that your customer withholds for a transaction to remit to a tax authority on your behalf.

- **Use longer numbers for checks and deposit slips.** You can now enter check numbers and deposit slip numbers that are up to fifteen characters long, except in Sage 300 Payroll, where check numbers can be up to nine characters long.

  If you use third-party products that integrate with Sage 300 Bank Services, check with the vendor of your third-party product to ensure their product is fully compatible with this release.

- **Specify customer account sets in O/E templates.** You can now specify customer account sets in Order Entry templates. If you enter a transaction in Order Entry for a customer with no record in Accounts Receivable, the customer account set specified in the O/E template will be entered by default.

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 the classic 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:

- **See more information by making text smaller.** A new **Text Size** setting lets you change the size of text on web screens to smaller sizes than the default. Using smaller text lets you see more fields and controls without having to scroll down. You can set text size for all screens, or for individual specific screens, as follows:

  - To set text size for all screens, use the Text Size setting on the new Settings menu on the welcome bar.

  - To set text size for one specific screen, use the Text Size setting on the Options menu for the screen. (The setting is available on all screens that have an Options menu.)

- **Specify BOM numbers on details for shipments, credit notes, and debit notes.** For a transaction that was created from scratch in the O/E Shipment Entry or O/E Credit/Debit Note Entry screens (that is, a shipment not created from an order, or a credit/debit note not created from an invoice), when entering a detail for a Bill of Material (BOM), you can now specify a BOM number in the **Kit/BOM** field.

- **Customize report printing so you can keep more web screens open.** In web screens, you can have a maximum of ten screens open at a time. By default, each printed report you have open counts toward this limit of ten screens, which may prevent you from opening other web screens. You can now customize web screens so that printed reports do not count as open screens. For more information, see Sage Knowledgebase article 106233.

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.

If you use Sage Intelligence Reporting Cloud, 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.

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.

Technical information

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

Product Update 1 program fixes

The following sections describe program fixes included in Product Update 1.

Signing In

Fixed a problem that prevented you from signing in to Sage 300 if you do not have Accounts Receivable activated. (Reference #8008399849)

Synchronization Between Web Screens and Desktop Screens

Fixed a problem that occurred if you changed a customer's phone number in Sage 300cloud web screens—on the O/E Ship-To Address screen, O/E Customer Bill-To Address screen, or A/R Ship-To Location Information screen—which caused the updated phone number to be formatted incorrectly in desktop screens. (Reference #8008339169)

Comments for A/R Customers and A/P Vendors

In Sage 300cloud web screens, on the Comments tab of the A/R Customers and A/P Vendors screens, comments that include line breaks (you press **Enter** or **Shift**+**Enter** to create a new line of text in the comment) can be saved correctly. Previously, line breaks were removed when you saved comments. (Reference #8008314858)

Bank Services

- In Sage 300cloud web screens, on the Check Stocks tab of the Banks screen, Checks Then Advices is now available to be selected in the **Stock Type** field. (Reference #8008374342)

- Fixed a problem that prevented you from reconciling withdrawals for checks generated from Sage 300 Payroll. (Reference #8008401817)

General Ledger

- Fixed a problem in Sage 300cloud web screens that prevented you from printing the Transactions Listing report for a range of periods ending with **ADJ** (Adjustment) or **CLS** (Closing). (Reference #8008368359)

- On the Journal Entry screen in Sage 300cloud web screens, if there is a detail in the table and you create a new detail in Quick Entry Mode, the new detail uses the same date as the previous detail. (Reference #8008353016)

Sage CRM Integration

- By default, when you promote an order from Sage CRM to Sage 300, the Order Type in Sage 300 (which you can see on the O/E Order Entry screen) is set to Active. Previously, the Order Type was set to the Default Template Code specified on the O/E Options screen. (Reference #8008188698)

- Fixed a problem that prevented you from creating a quote or an order for an opportunity if the description for the opportunity includes special characters. (Reference #8008219883)

- If you try to create a quote or an order for a customer in Sage CRM but are unable to because the customer has not been promoted to Sage 300 and your Sage 300 system does not allow non-existent customers, the message that appears is more helpful and informative. (Reference #8007833020)

- Fixed a problem that prevented you from installing Sage CRM integration if you have enabled Transport Layer Security (TLS) 1.2 in your Windows system.

- Fixed a problem that occurred if Sage 300 Order Entry is not activated, which prevented you from unlinking Sage CRM companies from Sage 300 customers. (Reference #8008415957)

Sage 300 2021 program fixes

Sage 300 2021 includes program fixes for some problems that exist in the most recent previous version (Sage 300 2020 Product Update 2). The following sections describe these program fixes.

Bank Services

When you reverse a payment (using the Bank Reverse Transactions screen), if the payment includes withheld tax amounts, the offsetting tax tracking record and the offsetting update to 1099/CPRS statistics are created.

Using Web Screens in Chrome

Fixed a problem that prevented you from signing in to Sage 300cloud web screens using version 84 (or newer) of the Chrome browser. For more information about using Chrome 84 with Sage 300, see Sage Knowledgebase article 106348.

Payment Processing

In Sage 300cloud web screens, you can now set up credit cards and process payments when using version 84 (or newer) of the Chrome browser. For more information about using Chrome 84 with Sage 300, see Sage Knowledgebase article 106348.

Sage CRM Integration

Fixed a problem that prevented you from using Sage 300 screens in Sage CRM when using version 84 (or newer) of the Chrome browser. For more information about using Chrome 84 with Sage 300, see Sage Knowledgebase article 106348.

General information

- Sage 300 2021 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 2021 (internally versioned as 6.8A) 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 2021 at the same time. Sage 300 2021 programs do not work with programs from earlier versions.

- 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

- To use Visual Process Flows, you must have Adobe Flash Player. Adobe Flash Player is no longer installed with Sage 300, so you may need to install it separately.

- 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 2021 includes SP23 for SAP Crystal Reports® runtime engine.

  If you use Sage HRMS or Sage Fixed Assets integrated with Sage 300, refer to the *Sage 300 2021 Compatibility Guide* for updated information on compatibility with Sage HRMS and Sage Fixed Assets. The *Sage 300 2021 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

Compatibility changes in this release include:

- If you use Sage 300cloud web screens, some versions of Windows are no longer supported because IIS does not start when using these versions of Windows. For more information, see Sage Knowledgebase article 106643.

For a complete list of compatible programs, database platforms, and operating systems, see the *Sage 300 2021 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.

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- 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 2021. However, it must be installed separately.

Installing product updates

After installing a product update:

- If you use Sage 300cloud web screens, you must use Database Setup to configure the Portal database again.

- If you use Sage CRM integrated with Sage 300, you must upgrade your CRM integration as follows:

  - Install the Sage CRM integration for Sage 300, which is available on Sage Knowledgebase article 45434.

  - Uninstall and then reinstall the Sage CRM Synchronization Component. (Use the Sage CRM Workstation Setup screen in Sage 300 to install the Sage CRM Synchronization Component.)

- If you 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.

- You should clear your browser's cache. (Some fixes included in the update may not take effect until you do.)

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 2021 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 2021**.

- To remove individual Sage 300 programs:

    a. Click **Sage 300 2021**, and then click **Change**. (Do not double-click Sage 300 2021.)

    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 2021 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 2021 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.

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