Sage 300 2020 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 2

This section contains a summary of new features and changes in Product Update 2.

General improvements

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

- **Use online bank feeds to reconcile bank accounts.** Bank feeds make it fast and easy to get transactions from your bank, and they're supported by most major banks.

  The Reconcile OFX Statements screen is now the Reconcile E-Statements screen. You can use this screen to get electronic statements in either OFX format or from bank feeds.

- **General Ledger integration with Tax Services.** Integrating General Ledger and Tax Services allows you to enter tax amounts in G/L journal entries. The tax amounts are posted to Tax Services so they

appear in the Tax Tracking report. You can also include them in the following G/L reports:

- Sage 300 Intelligence Reporting
- Sage Intelligence Reporting Cloud

  ◦ G/L Batch Listing report

  ◦ G/L Posting Journals report

- **Print T5018 (CPRS) forms on plain paper.** If your company operates in Canada and needs to file T5018 (CPRS) forms, you can now print these forms on plain paper. Previously, you could print only to official CPRS forms.

Sage 300cloud web screens improvements

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

- **Company colors.** If you use Sage 300 to manage multiple companies, you can assign a unique color to each company to make it easier to see which company's information you are viewing and avoid data entry errors. Previously, company colors appeared only in classic screens. Now they also appear in web screens, at the top of the Sage 300cloud home page and screens.

  > **Note:** This feature is available only in programs created using the Sage 300 Software Development Kit (SDK). If you use integrated programs that were not created using the Sage 300 SDK, company colors will not appear in screens for those programs.

  You set up company colors using Sage 300 Database Setup. For more information, see Assigning Company Colors.

- **Enter long comments for order details.** For order details on the O/E Order Entry screen, you now enter information in the **Comments/Instructions** field in a box instead of a table. This allows you to enter long comments without splitting them into multiple rows in a table.

- **Specify BOM numbers on order details.** On the O/E Order Entry screen, when entering an order detail for a Bill of Material (BOM), you can now specify a BOM number in the **Kit/BOM** field.

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 screens:

- **Multiple contacts for customers and vendors.** You can now set up multiple contacts for customers (including national accounts) and vendors. For each customer and vendor, you can then set up Sage 300 to email A/P, A/R, O/E, and P/O documents to some or all of the contacts for the customer or vendor.

  If you have integrated Sage 300 with Microsoft Office 365 or with Sage CRM, the new contacts are supported in the Sage Contact app for Outlook 365 and in Sage CRM.

  For more information, see About Contacts.

Sage 300cloud web screens improvements

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

- **New look.** We've updated the visual appearance of Sage 300cloud web screens so information is clearer and more accessible, making the system easier to use for experienced users, and faster to learn for new users.

Sage 300 classic screens improvements

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

- **Forcibly sign out users who are signed in to web screens.** On the Current Users screen, the Administrator user can now forcibly sign out users who are signed in to web screens.

CRM Integration improvements

Most of the fields on the Company Summary page in Sage CRM are now synchronized with Sage 300. (Previously, a smaller number of these fields were synchronized.)

Important!

After installing this product update, you must upgrade your CRM integration as follows:

- Install the Sage CRM integration for Sage 300 2020.1, which is available on 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.)

What's new in Sage 300 2020

This section contains a summary of new features and changes in the 2020 release.

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:

- **New Payroll Employee Timecards web screen.** The Payroll Employee Timecards screen is now available in web screens, allowing you to enter and manage employee timecards.

- **Run Sage 300cloud in Multiple Browser Tabs.** You can now run Sage 300cloud in multiple browser tabs or windows at the same time.

- **Improved support for French and Spanish languages.** French and Spanish characters can now be entered in all fields in web screens. (Previously, some fields did not support this.)

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 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.

Sage 300 classic screens improvements

This release includes the following new features and improvements in Sage 300 classic screens:

- **Improved help.** We've updated Sage 300 help to make it easier for you to find important information and instructions:

  - Search results are more relevant and include topic excerpts to help you find what you're looking for. Also, you can now use internet search engines to find information in the help.

  - Help topics are more readable, and the help has a fresh, modern look and feel.

  - You can view the new help in a browser on any device with internet access, even if you don't have Sage 300 open.

  The new help is available only online, but you can download a copy from Knowledgebase article 99001.

- **See web screens users on the Current Users screen.** You can now see who is signed in to web screens.

CRM Integration improvements

When you create or change an order entry transaction that is linked to a CRM opportunity, a corresponding communication record is automatically created in Sage CRM. This feature works whether you create or change the transaction in Sage 300 or Sage CRM.

> **Note:** If you do not want communication records to be automatically created as described above, you can turn off this feature by selecting the **Suspend O/E Communication Integration to Sage CRM** option on the Sage CRM Setup screen.

Technical information

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

Product Update 2 program fixes

The following sections describe program fixes included in Product Update 2.

Emailing Documents

Fixed a problem that could occur if you email documents from Sage 300 using SMTP, which could cause documents you emailed to have an incorrect "tmp" file name.

Invoices for Additional Costs

If you have a P/O receipt for which the document date and posting date are different, and there is an additional cost for the receipt, the P/O invoice generated by the receipt for the additional cost has the correct document date and posting date. Previously, the document date from the receipt was used as the posting date for the additional cost invoice. Also, when you ran day-end processing, the additional cost invoice with the incorrect posting date was transferred to Accounts Payable.

Order Entry

- Fixed a problem that could prevent a credit warning from appearing if you try to post a transaction for a customer who belongs to a national account, and posting the transaction would exceed the national account's credit limit.

- Fixed a problem in Sage 300cloud web screens that could occur on the Order tab of the Order Entry screen, which prevented you from using the finder in the **Item Number / Miscellaneous Charge** field in the detail table. This problem occurred only if you typed something in the field before trying to use the finder.

Project and Job Costing

Fixed a problem that occurred if you have a timecard user who is not assigned to a PJC employee, which allowed the timecard user to see timecards for all employees.

Sage CRM Integration

In Sage CRM, if you create a quote or order for a company that has not been promoted to Sage 300, the address specified for the company appears in the **Sold To** box on the quote/order.

> **Note:** In Sage CRM, you can no longer enter or change information on the Customer Bill-To Address screen.

Ops Inquiry

- Fixed a problem on the OE Invoice Inquiry screen, which could prevent payment amounts from appearing on the Pays/Adjs tab.

- Fixed a problem that prevented you from using Ops Inquiry except when running Sage 300 as the Windows administrator user.

Sales Analysis

Fixed a problem that prevented you from using Sales Analysis except when running Sage 300 as the Windows administrator user.

Product Update 1 program fixes

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

Finders

Fixed a problem in Sage 300cloud web screens that prevented you from using finders in tables when using version 76 or 77 of the Chrome browser.

Datapiped Reports

Fixed a problem in Sage 300cloud web screens that could occur if someone printed a datapiped report. The effects of this problem varied (for example, it could prevent you from posting, could cause IIS to stop working, or could cause the web screens to stop responding).

System Manager

- Fixed a problem in Sage 300 classic screens that could cause some fields to be displayed incorrectly, particularly on the A/R Options and A/P Options screens.

- Fixed a problem on the Security Groups screen in Sage 300cloud web screens that could cause the list of choices in the **Application** field to include some apparently duplicated items, but they were not really duplicates because they did not have the correct security authorizations. This problem occurred only if you use third-party programs integrated with Sage 300.

- Fixed a problem on the User Authorizations screen in Sage 300cloud web screens that could cause the table to include some apparently duplicated applications, but they were not really duplicates because they did not have the correct security groups. This problem occurred only if you use third-party programs integrated with Sage 300.

Accounts Receivable

Fixed a problem in Sage 300cloud web screens that prevented you from adding new customer records if the **Keep Statistics** option (on the Options screen) was not selected.

Accounts Payable

- Fixed a problem that could occur in Sage 300cloud web screens if you use multicurrency accounting, which could prevent you from opening some invoice batches from the Invoice Batch List screen. This problem occurred for an invoice batch if a required exchange rate was not set up for one or more of the invoices in the invoice batch.

- Fixed a problem on the Invoice Entry screen in Sage 300cloud web screens that could incorrectly cause a "Value for Invoice Details optional field has not been set" message to appear after you entered information in the **Distribution Code** or **Distribution Amount** fields. This problem occurred if you use optional fields on invoice details, and No was entered in the **Value Set** field for any of these optional fields.

General Ledger

- Fixed a problem that prevented you from posting G/L transactions provisionally if you use Spanish as your Sage 300 user language.

- Fixed a problem in Sage 300cloud web screens that could occur when you selected a report format on the Chart of Accounts report, which caused a different report format to be selected. This problem occurred only in single currency systems.

Purchase Orders

If you use Purchase Orders as a stand-alone program (without Inventory Control), you do not need to run day-end processing before upgrading to a newer version of Sage 300.

Sage CRM Integration

- When promoting a company to Sage 300, you can now include special characters (such as & or $) in the customer/vendor number.

- Fixed a problem on the Quotes tab for Opportunities, which could occur when promoting a quote to Sage 300 by clicking **Promote to Order**. The problem prevented the ship-to location for the quote from being automatically set as the ship-to location for the Sage 300 order.

Ops Inquiry

The IC Item Inquiry screen now opens faster.

General information

- Sage 300 2020 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 2020 (internally versioned as 6.7A) 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 2020 at the same time. Sage 300 2020 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.

- Sage 300 2020 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 2020 Compatibility Guide* for updated information on compatibility with Sage HRMS and Sage Fixed Assets. The *Sage 300 2020 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:

- For Sage 300cloud web screens, Internet Explorer is no longer a supported browser.

- You can no longer import and export data in the following formats:

    ◦ Older versions of Access (versions older than Access 2007)

    ◦ Excel 5.0

    ◦ dBase 5.0

For a complete list of compatible programs, database platforms, and operating systems, see the *Sage 300 2020 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 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 Knowledgebase article 76926.

- When previewing reports in web screens, information in some reports is not aligned correctly. To work around this issue, export the report to PDF format. For more information, see 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 2020. 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 may need to install a new Sage CRM integration. This is required for the following product updates:

  - Product Update 1

    Note: For this product update, you must also 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.)

  - Product Update 2

  The integrations are available on Knowledgebase article 45434.

- 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.)

- On any workstations you use, you must reinstall workstation setup as the Windows administrator user if:

- ◦ The product update includes changes to workstation setup.

- ◦ An earlier product update includes changes to workstation setup, and you have not previously installed that product update or any other subsequent product update.

  > **Example:** Suppose that the current Product Update is 5. Product Update 2 includes changes to workstation setup, and the other product updates do not. You have been using Product Update 1. You did not install Product Update 2, 3, or 4. You have now installed Product Update 5. To update your workstations with the changes to workstation setup that were included in Product Update 2, you must reinstall workstation setup.

The following product updates include changes to workstation setup:

- ◦ Product Update 2

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 2020 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 2020**.

   - To remove individual Sage 300 programs:

     a. Click **Sage 300 2020**, and then click **Change**. (Do not double-click Sage 300 2020.)

     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 2020 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 2020 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 Knowledgebase article 84797.