Sage 300 2019 release notes

Thank you for choosing a Sage accounting product.

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 3

This section contains a summary of new features and changes in Product Update 3.

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.

What's new in Product Update 2

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

Sage 300c web screens improvements

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

- **Support for Job Related Documents in Accounts Receivable.** In Accounts Receivable, you can now work with job-related invoices, recurring charges, receipts, adjustments, and refunds.

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 300c web screens and Sage 300 classic screens:

- **Reverse Charges.** In Tax Services, you can set up reverse charges (also called customer accounting or self-assessed taxes) for purchases. A reverse charge is a tax amount owed on goods or services you purchase, which you must remit directly to the relevant tax authority, instead of paying it to the vendor.

  > **Notes:**
  > - To use this feature, you must generate a license file using the **CreateRWLic** tool, which you can download from Sage Knowledgebase article 94230.
  >
  >   After generating the license file, enter your activation code on the License Manager screen in Sage 300.
  > - To use this feature on a workstation, after installing this product update you must reinstall workstation setup as the Windows administrator user.
  > - Only English reports include information related to this feature. Reports in other languages do not. For a list of related reports, see Sage Knowledgebase article 94471.

- **Withholding Taxes.** In Tax Services, you can set up withholding taxes for purchases. A withholding tax is applied when purchasing goods or services from a vendor, and allows you to withhold some or all of either the selling price or the tax amount for a transaction. You then remit the withheld amount to a tax authority on behalf of the vendor.

> **Notes:**
> - To use this feature, you must generate a license file using the **CreateRWLic** tool, which you can download from Sage Knowledgebase article 94230.
>
>   After generating the license file, enter your activation code on the License Manager screen in Sage 300.
>
> - To use this feature on a workstation, after installing this product update you must reinstall workstation setup as the Windows administrator user.
>
> - Only English reports include information related to this feature. Reports in other languages do not. For a list of related reports, see Sage Knowledgebase article 94471.

Sage 300c web screens improvements

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

- **Tax Reporting programs for Australia and Singapore.** The Australia Tax Reports and Singapore Tax Reports programs are now available in web screens. If you report taxes in Australia or Singapore, these programs help you gather and prepare information that you need for tax reporting.

  You can download these programs from Sage Knowledgebase article 93529.

Sage 300 classic screens improvements

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

- **United Kingdom Taxes program.** If you report taxes in the United Kingdom, a new program is available to help you prepare digital records for your VAT, enabling you to provide updates to HMRC using the Making Tax Digital service.

  You can download the United Kingdom Taxes program from Sage Knowledgebase article 93529.

  > **Important!** To use the United Kingdom Taxes program on a workstation, after installing this product update you must reinstall workstation setup as the Windows administrator user.

- **Australia Tax Reports and Singapore Tax Reports help.** Help for these programs is now available, and can be opened from the Help menu or by pressing F1.

Office 365 integration with Sage 300

Integrating Microsoft Office 365 with Sage 300 allows you to use Sage Contact, which is an app for Office 365 that lets you view and manage Sage 300 customer information within Outlook. For more information, see Office 365 Integration with Sage 300.

What's new in Sage 300 2019

This section contains a summary of new features and changes in the 2019 release.

General improvements

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

- **Global Search.** Type a name, description, number, or code in Global Search to quickly find transactions or records in your database. You can search for people, companies, transactions, accounts, and many other types of records.

- **Export Declaration Number field.** In Accounts Receivable and Order Entry, you can now enter export declaration numbers for individual invoice details. This information is required for tax purposes in some jurisdictions (such as Malaysia and Singapore).

  An **Export Declaration Number** field is available on the:

  - Details table on the Document tab of the A/R Invoice Entry screen.

  - A/R Detail Accounts/Taxes screen (in classic screens).

  - Details table on the Invoice tab of the O/E Invoice Entry screen.

  - O/E Items/Taxes screen (in classic screens).

- **Tax Authority reference fields for Malaysia and Singapore.** On the Tax Authorities screen, you can enter identifying information for a "principal" in the **Reference Name** and **Reference Number** fields. You can group tax reporting by these principals.

Sage 300c web screens improvements

This release includes the option to install Sage 300c web screens: modernized versions of Sage 300 screens that you can use in a web browser. The release includes a number of new web screens, as well as new features and enhancements for existing web screens.

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 300c 2019 web screens:

- **Improved Inquiry tool.** The Sage 300c Inquiry tool has been redesigned to be more powerful and versatile. It includes many new standard queries, and you can now create your own custom queries.

> **Note:** The A/R Documents and A/R Customer Documents queries that could previously be opened from the Inquiry tool on the web toolbar are now opened from the navigation menu instead.

To learn more about new web screens and features available in this release, see the following documentation and resources:

- Sage 300c web screens online help
- *Sage 300c web screens getting started guide*

> **Important!** When using Sage 300c 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 300c 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.

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Sage 300 classic screens improvements

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

- **Tax Reporting programs for Australia and Singapore.** If you report taxes in Australia or Singapore, new programs are available to help you gather and prepare information that you need for tax reporting. User's guides for these new programs are available on the Sage 300 Product Documents website.

  You can download these programs from Sage Knowledgebase article 93529.

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Redesigned CRM Integration

We've redesigned the way that Sage CRM integrates with Sage 300 to make it easier to set up, and to improve usability and performance. Integration screens now have the same modern look and feel as web screens, and perform faster too! The integration now uses the Sage 300c web screens instead of the old Sage 300 Portal, which makes installation much simpler.

For more information, see the Sage CRM Integration Guide for Sage 300 2019, which is available on the Sage 300 Product Documents website.

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Technical information

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

Product Update 3 program fixes

The following sections describe program fixes included in Product Update 3.

Tax Services

Fixed a problem that caused the Tax Tracking report to include all A/P payments, instead of only those that the report should include.

Accounts Receivable

Fixed a problem in Sage 300c web screens that caused the Receipt Entry screen to stop responding if you opened the Document Taxes screen for a miscellaneous receipt. This problem also caused the Document Taxes screen to show incomplete information for the miscellaneous receipt.

Accounts Payable

- Fixed a problem in Sage 300 classic screens that prevented you from importing data on the Payment Entry screen if the data you tried to import included **Adjustment_G_L_Distributions** records.

- Fixed a problem in Sage 300c web screens on the Detail/Taxes screen for invoices, which could cause an incorrect amount to appear in the **Tax Base** field. This problem occurred if you changed the item tax class for a detail from a taxable tax class to an exempt tax class.

- In a multicurrency system, when you apply a prepayment for a vendor whose currency is different from your functional currency, the related posting journal shows correct credit and debit information for the applied prepayment.

Purchase Orders

Fixed a problem in Sage 300c web screens that prevented you from entering details on the Requisition Entry screen if you use Purchase Orders as a stand-alone program (without Inventory Control).

Order Entry

Fixed a problem in Sage 300c web screens that could cause the Order Entry screen to stop responding if you deleted an order detail.

Project and Job Costing

Fixed a problem that could cause the Contract Maintenance screen to perform slowly or stop responding. This problem occurred if you repeatedly opened the Category Maintenance screen for different categories.

Account Code Change

Fixed a problem that occurred if you use G/L Consolidations, which prevented you from posting a change list.

Sage CRM Integration

> **Important!** For some of these fixes to work, you must uninstall and then reinstall the Sage CRM Synchronization Component (E/W) after installing product update 3.

- Fixed a problem that prevented you from promoting a customer from Sage CRM to Sage 300 if Order Entry is not activated in Sage 300.

- On the **CRM Opportunity** tab, you can now send email messages to addresses with a long top-level domain (the top-level domain is the part of the email address at the end, after the dot). For example, you could now send email to user1@address.local.

- If you change a customer's contact name in Sage 300 (on the Contact tab of the A/R Customers screen), a new person record is created in Sage CRM and the Sage 300 customer is linked to the newly created Sage CRM person. In Sage CRM, the person record that was previously linked to the Sage 300 customer is not changed.

- You can send email messages to a company that has not been promoted to Sage 300 on the CRM Opportunity tab.

- If you have multiple Sage 300 companies integrated with Sage CRM, you can promote a company from Sage CRM to any of your integrated Sage 300 companies. Previously, you could be prevented from choosing the Sage 300 company.

- Fixed a problem that could cause a quote or order to be incorrectly removed from the Opportunities Summary page. This problem occurred if you updated the quote or order in Sage 300c web screens.

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Product Update 2 program fixes

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

Accounts Receivable

In Sage 300 classic screens, the Refund Batch List screen performs faster, particularly when working with large batch lists.

Accounts Payable

- Fixed a problem in Sage 300 classic screens that could cause the Payment Register report to show the wrong vendor for some transactions.

- When printing 1096 forms for tax year 2018, printed information is printed in the correct positions on the form.

Inventory Control

If you have set up G/L integration to create G/L transactions by adding them to an existing batch (this setting is specified on the G/L Integration screen), day end processing now performs faster than it did previously.

Sage CRM Integration

Fixed a problem that prevented customizations to a Sage 300 screen from appearing when you opened the screen from Sage CRM.

Ops Inquiry

On the Ops Inquiry IC Item Inquiry screen, the **S/Os** and **Qty. Avail.** tabs now open faster.

Sage 300 SDK

Fixed a problem that could prevent users from importing user authorizations for a subclassed program.

Product Update 1 program fixes

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

Item Finder

Fixed a problem that could cause incorrect quantities to be displayed in the Item finder.

Accounts Receivable

Fixed a problem in Sage 300c web screens that could prevent you from opening the Refund Entry screen. This problem occurred if you have activated only the Sage 300 financial modules.

Project and Job Costing

Fixed a problem in Sage 300 classic screens that could cause the Contract Maintenance screen to stop responding.

Ops Inquiry

In Sage 300 classic screens, when you open the Item finder on the Ops Inquiry IC Item Inquiry screen, the finder displays the same criteria you specified the last time you used this finder.

General information

- Sage 300 2019 supports upgrades *only* from versions 5.6, 6.0, 2012, 2014, 2016, 2017, or 2018.
- 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 2019 (internally versioned as 6.6A) 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 2019 at the same time. Sage 300 2019 programs do not work with programs from earlier versions.

- The following programs are installed with Sage 300, and are required to use Sage 300:

  - MSXML (Microsoft XML Core Services) 6.0

  - Microsoft SQL Server Native Client 11.0

  - Microsoft .NET Framework 4.6.2

- Sage 300 2019 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 2019 Compatibility Guide* for updated information on compatibility with Sage HRMS and Sage Fixed Assets. The *Sage 300 2019 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.

  > **Note:** The guides mentioned above are available only online. They are not included with the Sage 300 install.

- Product documentation for Sage 300 is available from the Sage 300 Product Documents website.

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Compatibility with other programs

For a complete list of compatible programs, database platforms, and operating systems, see the *Sage 300 2019 Compatibility Guide*, available from Sage Knowledgebase article 26777.

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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.

- Sage 300 uses components of Microsoft Internet Explorer to display help topics. If the Enhanced Security Configuration setting is turned on for your browser, you will receive an error message when you try to display certain help topics. To display help correctly for all topics and to prevent the error message, you must add the following site to the list of Trusted sites in Internet Explorer: about:security_A4WCONTAINERXP.EXE.

- If you are using Sage 300 on a workstation in a client-server environment, you could have trouble viewing help. For example, your browser might display the message "Page cannot be displayed." For a solution, see Sage Knowledgebase article 18477, or Microsoft support article 896054.

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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 300c, you must install all released product updates for that version *before* activating your data.
>
>   If you use Sage 300c 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 2019. However, it must be installed separately.

Installing product updates

After installing a product update:

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

- 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 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 2019 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 2019**.

   - To remove individual Sage 300 programs:

     a. Click **Sage 300 2019**, and then click **Change**. (Do not double-click Sage 300 2019.)

     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 2019 includes Canadian and US Payroll. For more information, see the related release notes, which you can find on the Sage 300 Product Documents website.

Sage 300 Intelligence Reporting

Sage 300 2019 includes Sage 300 2019 Intelligence Reporting. For more information, 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.

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Sage Intelligence Reporting Cloud

Sage Intelligence Reporting Cloud is a financial reporting tool integrated with Sage 300c.

To use Sage Intelligence Reporting Cloud, users 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.

Also, for the ADMIN user you must customize two Sage 300 program files. For more information, see Sage Knowledgebase article 84722.

We recommend that you configure Sage 300c 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.

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