Sage 300 2016

What's New

What's New in Sage 300 2016

Sage 300 2016 includes new features and improvements, including:

- New web screens that allow you to use Sage 300 in a web browser.

- A software development kit (SDK) for web screens.

- Enhancements to G/L Journal Entry and related reports that provide more detail about transactions.

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.

In Product Update 1

If you use Sage 300 web screens, this update includes many new features and improvements.

Web screens now available in Spanish

Web screens are now available in English, French, Spanish, and Chinese (Simplified and Traditional). Help and documentation for web screens is available in English and French.

Manage inventory with select Inventory Control web screens

Inventory Control maintains detailed perpetual inventory records and produces reports to help you manage your stock effectively. Set up and track inventory items, enter and post transactions, and print reports.

Select Inventory Control web screens are available in this release. For more information, see the Sage 300 web screens help.

Manage sales orders and invoicing with select Order Entry web screens

Order Entry handles all your order entry, invoicing, and order tracking needs, regardless of the size and complexity of your business. Process orders and shipments, track transaction details and sales information, and print Order Entry forms and reports.

Select Order Entry web screens are available in this release. For more information, see the Sage 300 web screens help.

Manage requisitions and purchasing with select Purchase Orders web screens

Purchase Orders provides all the transaction entry, processing, and reporting features you need to fully automate your purchase order procedures and meet your management needs. Enter and process purchase requisitions, purchase orders, receipts, vendor invoices, returns, credit notes, and debit notes, and print forms and mailing labels for your vendor transactions.

Select Purchase Orders web screens are available in this release. For more information, see the Sage 300 web screens help.

New General Ledger web screens

This release includes 12 additional General Ledger web screens you can use to manage accounts, set up General Ledger options, perform periodic processing, and print additional General Ledger reports.

The following General Ledger web screens are now available:

- **Accounts:** Fiscal Set Comparison.

- **Setup:** Revaluation Codes, Source Codes.

- **Periodic Processing:** Clear History, Consolidate Posted Transactions, Create Allocation Batch.

- **Reports:** Batch Status, Posting Journals, Recurring Entries, Source Codes, Source Journals, Source Journal Profiles.

For more information, see the Sage 300 web screens help.

New Accounts Payable web screens

This release includes 12 additional Accounts Payable web screens you can use to manage vendors, perform periodic processing, and print additional Accounts Payable reports.

The following Accounts Payable web screens are now available:

- **Vendors:** Recurring Payables, Remit-To Locations.

- **Periodic Processing:** Revaluation, Create Retainage Batch, Clear History, Clear Statistics, Delete Inactive Records.

- **Vendor Reports:** Vendor Groups, Recurring Payables, Remit-To Locations.

- **Transaction Reports:** Batch Status, Posting Journals.

For more information, see the [Sage 300 web screens help](#).

New Accounts Receivable web screens

This release includes 16 additional Accounts Receivable web screens you can use to maintain customer and item records, perform periodic processing (including revaluation and recurring charges), and print additional Accounts Receivable reports.

The following Accounts Receivable web screens are now available:

- **Customers:** Recurring Charges.

- **Setup:** Items.

- **Periodic Processing:** Revaluation, Create Retainage Batch, Create Recurring Charges Batch, Create Write-Off Batch, Clear History, Clear Statistics, Delete Inactive Records.

- **Customer Reports:** Customer Groups, National Accounts, Recurring Charges, Ship-To Locations.

- **Transaction Reports:** Batch Status, Deposit Slips, Posting Journals.

For more information, see the [Sage 300 web screens help](#).

Create schedules for recurring transactions

Use the Schedules web screen to create schedules for recurring transactions that you process in General Ledger, Accounts Receivable, and Accounts Payable.

Easily track activity trends, item performance, and salesperson performance

Three new widgets are available on the home page to help you track key performance indicators.

- **Activity Trend.** Use the Activity Trend widget to review the number and value of orders placed and the value of shipments processed in the past week, month, or year.

- **Inventory Item Performance.** Use the Inventory Item Performance widget to review the revenue performance of inventory items. The widget displays either the top 5 or bottom 5 items by revenue performance for a range of fiscal years and periods you specify.

- **Top Salespersons.** Use the Top Salespersons widget to review total sales amounts for your top salespersons.

For more information, see the [Sage 300 web screens help](#).

Locale-specific date formats

Dates displayed in web screens are now formatted according to your web browser locale settings, ensuring that dates are displayed in the correct format for your country or region.

Simplified navigation to administration screens and features

We've reorganized the "More" menu so it's easier to find screens and features in Administrative Services, Common Services, Bank Services, and Tax Services.

Additional improvements to specific web screens

This release includes a number of additional improvements to specific web screens, including the following:

- **Easier posting of journal entries.** On the G/L Journal Entry screen, use the new **Post** button to post entries.

- **See who entered transactions.** On transaction entry web screens in General Ledger, Accounts Payable, and Accounts Receivable, an **Entered By** field shows you who entered a transaction.

- **View and sort entries by document date and posting date.** On the G/L Journal Entry screen, use the new **Document Date** and **Posting Date** fields to specify the document date and posting date for an entry. On the G/L Transactions Listing report web screen, you can sort the report by these dates.

- **Select and view price lists, locations, and ship-via information for customers.** On the A/R Customers and A/R Ship-To Locations web screens, use the new **Price List**, **Location**, and **Ship-**

Via fields to select and view additional customer record details from Inventory Control and Order Entry.

- **Specify remit-to locations for vendors.** On the A/P Invoice Entry and A/P Payment Entry web screens, use the new **Remit To** field to specify remit-to locations for vendors.

Web screens software development kit (SDK)

A software development kit (SDK) for web screens is now available for members of the Sage Development Partner Program.

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

In the 2016 Release

New browser-based home page and web screens for Sage 300

This release includes the option to install Sage 300 web screens: modernized versions of Sage 300 screens that you can use in a web browser.

Whether you're using your desktop computer, your laptop, or your tablet, now you can enter transactions, generate reports, manage company finances, and more—anywhere, anytime.

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.

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

Here's a quick overview of what's available in Sage 300 web screens:

- **New browser-based home page.** Use the home page to find and open program features and reports, to review key business information, and to find help and resources.

- Add and customize widgets to see the information that matters most to you.

- Use the navigation menu to find and open program features ("windows") and reports.

- Use the Window Manager to switch between open windows, or to close windows.

- Click the Help menu at the top to see suggested articles and resources based on your current task.

- **Financial management web screens.** Use financial modules to set up your general ledger, maintain banking and tax information, and manage payables and receivables.

  A selection of frequently used screens from the following Sage 300 financial modules are available as web screens:

  - General Ledger

  - Accounts Payable

  - Accounts Receivable

  - Bank Services

  - Tax Services

- **Administration web screens.** Administrators can use web screens to update company information and maintain data.

  A selection of frequently used screens from the following Sage 300 administration modules are available as web screens:

  - Administrative Services

  - Common Services

- **Reports.** Print financial reports, transaction reports, and other key business information, right from your web browser.

Web screens are available in English, French, and Chinese (Simplified and Traditional). Help and documentation for web screens is available in English and French.

> **Note:** Users may need to adjust their web browser settings to ensure that web screens appear in the correct language. The preferred language for viewing web pages (specified in web browser settings) must match the language specified for the user in their Sage 300 user record.

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

Changes and New Features in System Manager

System Manager 2016 includes the following new features and improvements:

- **A new, more detailed User Authorizations report.** The new report allows you to specify a range of users to include on the report, and it displays detailed information about all security authorizations granted to these users. The new report also displays details about screen customizations specified in UI Profiles that are assigned to the users.

  > **Note:** You can still print the less detailed User Authorizations report that was available previously.

- **Non-administrator users can use database utilities outside Sage 300.** Users with security authorization to dump, load, and copy databases can now use the DBDump, DBLoad, and DBCopy utilities outside of Sage 300 by running them from the Windows Start menu. Previously, regardless of security authorizations, only the administrator user could do this.

Changes and New Features in Bank Services

Bank Services 2016 includes the following new features and improvements:

- On the Reconcile Statements screen, a new **Post** button allows you to post bank reconciliations. Previously, you could post reconciliations only from the Post Reconciliation screen.

- On the Reverse Transactions screen, the Finder now opens much faster for the **Check/Payment No.**, **Check/Receipt No.**, and **Bank Entry Number** fields.

- On the Quick Clearing screen, clearing deposits and withdrawals is now much faster.

Changes and New Features in Tax Services

Tax Services 2016 includes the following new features and improvements:

- A new **Clear History** screen gives you more control over when you clear tax tracking information, and what records you clear.

  > **Note:** You can no longer clear tax tracking information when you print the Tax Tracking report.

- When printing the Tax Tracking report by fiscal period, you can now specify a range of fiscal year/periods to include on the report. Previously, you could not specify a starting year/period other than the first fiscal year/period in your system.

Changes and New Features in Accounts Receivable

Accounts Receivable 2016 includes the following new features and improvements:

- You can post invoices, receipts, adjustments, and refunds in the following new ways:

  - On the Invoice Entry screen, a new **Post** button allows you to post an invoice batch.

  - On the Receipt Entry screen, a new **Post** button allows you to post a receipt batch.

  - On the Adjustment Entry screen, a new **Post** button allows you to post an adjustment batch.

  - On the Refund Entry screen, a new **Post** button allows you to print checks for a refund batch, and then immediately post the batch.

  - On the Invoice Batch List screen, a new **Post All** button allows you to post all unposted invoice batches that are set Ready To Post.

  - On the Receipt Batch List screen, a new **Post All** button allows you to post all unposted receipt batches that are set Ready To Post.

  - On the Adjustment Batch List screen, a new **Post All** button allows you to post all unposted adjustment batches that are set Ready To Post.

  - On the Refund Batch List screen, a new **Post All** button allows you to post all unposted refund batches that are set Ready To Post.

Changes and New Features in Accounts Payable

Accounts Payable 2016 includes the following new features and improvements:

- You can post invoices, payments, and adjustments in the following new ways:

  - On the Invoice Entry screen, a new **Post** button allows you to post an invoice batch.

  - On the Payment Entry screen, a new **Post** button allows you to print checks for a batch, and then immediately post the batch.

  - On the Adjustment Entry screen, a new **Post** button allows you to post an adjustment batch.

  - On the Invoice Batch List screen, a new **Post All** button allows you to post all unposted invoice batches that are set Ready To Post.

  - On the Payment Batch List screen, a new **Post All** button allows you to post all unposted payment batches that are set Ready To Post.

  - On the Adjustment Batch List screen, a new **Post All** button allows you to post all unposted adjustment batches that are set Ready To Post.

Changes and New Features in General Ledger

General Ledger 2016 includes the following new features and improvements:

- New fields on the Journal Entry screen provide more detail about transactions:

  - **Document Date** and **Posting Date.** These fields replace the single **Date** field that was available previously, and allow you to enter both a document date and a posting date for a journal entry.

  - **Entered By.** This field indicates who originally entered a transaction (regardless of whether it was originally entered in G/L or a subledger).

- A new **Date** field on the following reports allows you to specify whether the report includes document dates or posting dates:

  - Transactions Listing.

  - Posting Journals.

- Batch Listing.

- You can post batches of transactions in the following new ways:

  - On the Journal Entry screen, a new **Post** button allows you to post batches.

  - On the Batch List screen, a new **Post All** button allows you to post all unposted batches.

Changes and New Features in Order Entry

Order Entry 2016 includes the following new features and improvements:

- You can now specify whether a message appears when you post an order with an expected ship date that is later than the Deliver By date. To do this, you edit the **[ValidateREQUESTEDEXPSHIPDate]** setting in the OE.INI file. For more information, see Knowledgebase article 21367.

Changes and New Features in Project and Job Costing

Project and Job Costing 2016 includes the following new features and improvements:

- Performing the following actions is now much faster:

  - Deleting a project.

  - Clearing history for closed contracts.