

# Sage 300 2016 Product Update

## 3 Release Notes

Product Update 3 contains a modified version of one or more Sage 300 program components. It is not a full upgrade or a product replacement. It 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.**

### Updating Programs

After installing this product update:

- You must uninstall and then reinstall workstation setup on any workstations you use.
- If you use 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 will not take effect until you do.)

If you use Web Deployment, you may also need to delete some downloaded files to ensure that this product update is installed correctly.

For more information, see Knowledgebase article 34330.

### Upgrading to Later Versions

**Important!** If you upgrade to a later version of Sage 300, you must install all released product updates for that version **before** activating your data to avoid possible data corruption issues.

### Compatibility with Sage Programs

For a complete list of compatible programs, database platforms, and operating systems, see the [Sage 300 2016 Compatibility Guide](#) in the Sage Knowledgebase.

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For the 2016 tax year, the IRS has not made changes to the 1099-MISC paper forms or electronic filing format. This product update has no changes to the Print 1099/1096 Forms screen or the 1099 Electronic Filing screen.

## Known Issues

- 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.
- If you use Sage 300 web screens, it may take up to 24 hours for data and transactions entered in your Sage 300 system to appear in home page widgets. We are planning to address data caching and widget performance in a subsequent release.
- You may experience a problem that prevents you from opening Sage 300 screens from Sage CRM. To fix this problem, see Knowledgebase article 34906.
- Datapiped reports do not display Asian characters if your user format is set to English. To work around this issue, see Knowledgebase article 51322.

## Product Update 3 Program Fixes

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

### Web Deployment

- Fixed a problem that occurred when using Web Deployment which caused some screens to not open.

### Running Macros

- Fixed a problem that prevented you from using the GETRATES macro to update currency rates.

### General Ledger

- Fixed a problem that could cause incorrect Provisional Balance amounts to appear on the G/L Trial Balance Report if you selected the **Use Rolled Up Amounts** option. For more information, see Knowledgebase article [81698](#).

### Inventory Control

- Quarantined lots of components can no longer be auto-allocated or posted when assembling Bills of Material.

### Canadian and US Payroll

- Fixed a problem that could cause Payroll subscriptions to not be recognized. If this problem occurred, you were prevented from using Payroll.

### Ops Inquiry

- Fixed a problem that caused slow performance when navigating through lists of items on the BOM tab of the IC Item Inquiry screen. For more information, see Knowledgebase article [80471](#).

## Product Update 2 New Features and Enhancements

The following sections describe new features and enhancements included in Product Update 2.

### 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.

- 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.

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## Product Update 2 Program Fixes

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

### Report Printing

- Fixed a problem that could occur when printing reports in web screens, causing the report preview screen to appear blank. The problem occurred if Microsoft .NET Framework 4.6 was installed. For more information, see Knowledgebase article 73028.
- When printing reports to the **E-mail** print destination, the correct report file is included as an attachment in the e-mail. For more information, see Knowledgebase article 75660.

### System Manager

- When signing on to Sage 300, if security is turned on, the cursor now appears in the **Password** field by default (on the Open Company screen). For more information, see Knowledgebase article 75657.

### Accounts Payable

- Fixed a problem that caused the Vendor Number Finder to become unresponsive on some Accounts Payable web screens.

### Inventory Control

- If you update costing during posting instead of during day-end processing, running day-end processing that includes I/C transfers is now faster. For more information, see Knowledgebase article 79285.

### Sage CRM Integration

- Sage CRM 2017 is now supported.

### Ops Inquiry

- Fixed a problem that could negatively affect the performance of Ops Inquiry after upgrading to Sage 300 2016 from an earlier version. For more information, see Knowledgebase article 73564.
- Fixed a problem that negatively affected performance when clicking the **Next** button for item numbers on the S/Os tab and the Qty Avail tab. The problem also prevented Ops Inquiry from saving changes to table column order on the Item Inquiry screen. For more information, see Knowledgebase article

74724.

### Account Code Change

- Fixed a problem that occurred if you use Canadian or US Payroll, which caused payroll data to be corrupted if you made a change using the **G/L Segment Change** feature. For more information, see Knowledgebase article 79373.

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## Product Update 1 New Features and Enhancements

The following sections describe new features and enhancements included in Product Update 1.

### Sage 300 Web Screens

If you use Sage 300 web screens, this update includes a number of new features and improvements, including the following:

- Web screens are now available in Spanish.
- Manage inventory, sales, and purchasing with more than 100 new web screens for Inventory Control, Order Entry, and Purchase Orders.
- Manage, inquire, and report on accounts and transactions with more than 40 new web screens for General Ledger, Accounts Payable, and Accounts Receivable.
- Use three new dashboard widgets to track activity trends, item performance, and salesperson performance.
- Create schedules for recurring transactions.
- Many improvements made to Sage 300 desktop screens for the 2016 release now appear in Sage 300 web screens.
- Dates displayed in web screens are now formatted according to your web browser locale settings.
- A Software Development Kit (SDK) for web screens is now available for members of the Sage Development Partner Program.

For more information, see *What's New in Sage 300 2016*.

### Sage 300 Intelligence Reporting

Sage 300 Intelligence Reporting 2016 includes the following new features and improvements:

- Wildcards can be used to filter accounts in reporting trees, and when setting up row sets and account selection for formulas. For more information, refer to the [Using Wildcards to Select Accounts](#) guide.
- A new Missing Accounts tool in Report Designer makes it easy to identify General Ledger accounts that are missing from reports.
- A new welcome screen in Report Designer helps you decide whether to use the task pane or the layout generator.
- When distributing reports, a new **Convert each worksheet to static values** option allows you to specify whether formulas will be included in reports, or whether they will be converted to static values.
- Dynamic account ranges in Report Designer allow you to make areas on reports dynamic, so that information in these areas is updated automatically when you run a report (for example, you could use

dynamic account ranges on an income statement to automatically generate the accounts in each category, rather than manually listing these accounts).

New formulas related to dynamic account ranges are available:

- **Account Description.** Returns the account description for a specified account related to the company.
- **Structure Code.** Returns the structure code for a specified account related to the company.
- A new **Exclude Zero Detail Rows** option in the Report Designer Layout Generator allows you to exclude rows with zero balances from generated Excel worksheets.
- A new **Allow Reports in this Role to be edited** option in Security Manager allows you to specify whether users who are assigned to a role can edit the reports that are available for the role.
- Many new or improved standard reports are available, including:
  - Account level reports.
  - Training reports.
  - Dashboard reports.
- Sage 300 Intelligence Reporting has a fresh, modern look and feel. In addition to the visual changes, the home page no longer appears on standard reports, and new icons on reports provide quick access to help resources.
- Row sets now use the Group Category Code, which allows you to report based on groupings in Sage 300.
- When you open the help, it now shows content that is relevant to the screen you are using.
- General Ledger account numbers can now include:
  - Alphabetic characters.
  - Some new special characters (such as / or #), which may be used as account segment separators.

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## Product Update 1 Program Fixes

### Starting Sage 300

- Fixed a problem that could prevent you from starting Sage 300 2016 if you upgraded to this version from an earlier version, such as Sage 300 2012. For more information, see Knowledgebase article 71952.

### System Manager

- Fixed a problem with the **View** menu on the Sage 300 Desktop, which caused the **Toolbar** and **Status Bar** options to be reset (making the toolbar and status bar visible) each time you signed in to Sage 300. For more information, see Knowledgebase article 66316.

### Bank Services

- Fixed a problem that could occur when clearing history, which caused all records to be cleared, regardless of the date of the record. For more information, see Knowledgebase article 70056.
- The decimal symbol specified in your system's regional settings now appears correctly in numeric

values (such as €100,00). For more information, see Knowledgebase article 72628.

### Accounts Payable

- Updated the 1099 form and the 1096 form to meet changed IRS specifications for the 2015 year.

**Important!** When printing these forms directly to a printer, you must select the **Report Paper Size** option on the Print Destination screen. For more information, see Knowledgebase article 73134.

### General Ledger

- Improved the performance of the G/L Batch List screen. The screen now opens faster, particularly when using a large database. For more information, see Knowledgebase article 71262.

### Inventory Control

- Fixed problems that could prevent Day-End processing from completing. The problems occurred if the day-end process included one of the following:
  - Purchase Orders transactions with vendor item details. For more information, see Knowledgebase article 69605.
  - A transaction with a long comment, and the comment included characters from Asian languages (such as Chinese, Japanese, and Korean). For more information, see Knowledgebase article 50484.
- Fixed a problem that could prevent you from posting a shipment if the shipment had previously been saved, and if the shipment included an item with a default price list that displays prices to more decimal places than the number of decimal places used for the functional currency.

### RVSpy

- Fixed a problem that occurred when you ran RVSpy, which negatively affected system performance. For more information, see Knowledgebase article 70958.

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