

Sage 300 2017 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.

Microsoft .NET Framework Update

Sage 300 and Sage 300c 2017 require Microsoft .NET Framework 4.6.2. If you have not installed .NET Framework 4.6.2, you will be prompted to install it during installation of this product update, and you will need to restart your computer after installation is complete.

- To download and install Microsoft .NET Framework 4.6.2, visit Microsoft Download Center article [53344](#).
- For more information, see Knowledgebase article [78004](#).

Updating Programs

After installing this product update:

- You must uninstall and then reinstall workstation setup on any workstations you use.
- If you use Sage 300c web screens, you must:
 - Use Database Setup to configure the Portal database again.
 - Restart IIS after activating your data.
- 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](#).

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Upgrading to Later Versions

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 activate data for all company databases that use the same system database before signing in to web screens.

Compatibility with Sage Programs

For a complete list of compatible programs, database platforms, and operating systems, see the [Sage 300 2017 Compatibility Guide](#) in the Sage Knowledgebase.

2016 U.S. Tax Forms

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

- If you use Sage 300c web screens but have not configured them to use HTTPS, the first time you open Sage Intelligence Reporting Cloud from web screens, a warning message informs you that your connection is not private. You can safely disregard this message and proceed to Sage Intelligence Reporting Cloud.

Note: For your security, Sage recommends configuring web screens to use HTTPS. For more information, see Chapter 5 "Configuring Sage 300 Web Screens or Portal" in the *Sage 300 Installation and Administration Guide*.

- 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](#).
- Some periodic processing web screens that should be usable only when a single user is signed in may be usable even when multiple users are signed in. Before using such screens, ensure that all other users have signed out of all Sage 300 classic screens and Sage 300c web screens. (Examples of screens that should be usable only when a single user is signed in include G/L Create New Year, G/L Period End Maintenance, Bank Post Reconciliation, A/P Year End, A/R Year End, O/E Clear

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History, and P/O Clear History.)

- When previewing reports in Sage 300c 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 the Web Deployment option, when signing in for the first time after upgrading to Sage 300 2017 from an earlier version, the Sage 300 Web Session Manager prompts you to install an earlier version of Sage 300 .NET Libraries instead of Sage 300 .NET Libraries 2017. For instructions on how to work around this issue, see Knowledgebase article [76601](#).
- 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](#).

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.

Third-Party Programs

- Fixed a problem that could occur in Sage 300c web screens, which prevented you from entering an item number on some screens. This problem occurred only if you use a third-party program for Inventory Control.

Item Finder

- Fixed a problem that incorrectly caused an "Invalid field number" message to appear if you used the Item Finder to search for an item that included an apostrophe in the item ID.

Opening Web Screens After Resetting IIS

- Fixed a problem that occurred in Sage 300c web screens, which caused some screens not to work the first time you opened them after resetting IIS. (The screens worked normally after that.)

Running Macros

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

Accounts Receivable

- Fixed the following problems that occurred in Sage 300c web screens:
 - On the A/R Statements/Letters/Labels screen, you could not save changes to the report file specified in the **Use Statement** field. For more information, see Knowledgebase article [83108](#).
 - On the Adjustment Batch List, Invoice Batch List, Invoice Entry, and Refund Batch List screens, you

could not use the **Edit Columns** tool to customize table columns.

Accounts Payable

- Fixed a problem that occurred in Sage 300c web screens on the Adjustment Entry screen, which prevented you from using the **Edit Columns** tool to customize table columns.

General Ledger

- In Sage 300 classic screens, on the File menu of the Journal Entry screen, you can now select **Print Batch Listing Report** for any batch.
- Fixed a problem that occurred in Sage 300c web screens, which prevented you from printing the G/L Trial Balance report for a year with 13 periods.

Inventory Control

- Fixed a problem that caused the I/C Integrity Checker to incorrectly update item quantities maintained by third-party products. For more information, see Knowledgebase article [82543](#).
- Fixed a problem that allowed duplicate serial numbers to be used even if the **Allow Duplicate Serial Numbers** option was not selected on the I/C Options screen.
- Fixed a problem that could occur when transferring lotted items, which prevented you from allocating lot numbers to the items being transferred.
- When importing data for serialized or lotted items with outstanding serials or lots, you can no longer:
 - Clear the **Serial Number** or **Lot Number** options.
 - Change the costing method for items that use the **Serial** or **Lot** costing methods.
- Quarantined lots of components can no longer be auto-allocated or posted when assembling Bills of Material.
- Fixed a problem that occurred in Sage 300c web screens on the Current Transactions Inquiry, Item Location Details Quantity Inquiry, and Item Pricing screens, which prevented you from using the **Edit Columns** tool to customize table columns.

Purchase Orders

- Fixed a problem that could cause costs for serialized items to be calculated incorrectly on credit notes. This problem occurred only for serialized items that use a Costing Method of Serial (specified in Inventory Control).
- Fixed a problem that prevented you from deleting ship-via codes.
- Fixed the following problems that occurred in Sage 300c web screens:
 - On the Pending Receipts Inquiry screen, some results might not be found if you specified a vendor number that includes capital letters or special characters.
 - On the Purchase Order Entry and Receipt Entry screens, an error message incorrectly appeared if the unit cost for an item was set to zero by default and you changed this unit cost.
 - If Period 1 in your fiscal calendar is **not** January 1–January 31, an incorrect year and period appeared by default on the Clear History, Purchase Statistics Inquiry, and Purchase History Inquiry screens.

Order Entry

- Fixed a problem that occurred when you clicked the **Prepayment** button on the Order Entry screen, which caused changes you'd made to an order to be lost, and caused the prepayment document total to be incorrect.
- Fixed a problem that could occur when shipping a partial order that uses a unit of measure that is not singular (such as dozen), which caused an incorrect amount to appear in the **O/E Pending Balance** field on the Pre Transaction Credit Check and Credit Check screens.
- Fixed the following problems that occurred in Sage 300c web screens:
 - On the Shipment Entry screen, you may have been unable to print invoices during posting if your system is set up to select the **Create Invoice** option by default. For more information, see Knowledgebase article [84046](#).
 - On the Invoice Entry screen, if you changed the Quantity Invoiced on a detail line and then clicked Prepayment, the Prepayments screen displayed an incorrect Amount Due.
 - On the Credit/Debit Note Entry and Sales Statistics screens, you could not use the **Edit Columns** tool to customize table columns.
 - On the Order Entry screen:
 - After posting an invoice, the only print option that is automatically selected is the option to print the invoice. (Previously, other print options were also selected.) For more information, see Knowledgebase article [83106](#).
 - If you entered an incomplete item number, you could not use the item finder.
 - After manually completing a detail line, it was sometimes not possible to post the transaction. For more information, see Knowledgebase article [83113](#).
 - After posting a tax-inclusive transaction, the **Plus Excluded Tax** field on the Totals tab incorrectly displayed the tax amount (instead of the correct value: zero).
 - In the detail table on the Order tab, information entered in the **Comments/Instructions** field was not saved.

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.

Project and Job Costing

- Fixed a problem on the Contract Structures screen that could prevent you from deleting a contract structure.

Sage CRM Integration

- Fixed a problem that could occur when posting a customer number change, which caused the customer number to be changed in Sage 300 but not in Sage CRM.

Ops Inquiry

- Fixed a problem that could cause slow performance when opening the IC Item Inquiry screen. This problem occurred if you have a large number of Order Detail records. For more information, see Knowledgebase article [84122](#).

Product Update 2 New Features and Enhancements

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

General Improvements

The following new features and enhancements are available in both Sage 300c web screens and Sage 300 classic screens:

- **Improved Item Finder.** The Item Finder now includes the following information:
 - Quantity Available
 - Quantity Committed
 - Quantity on Hand
 - Quantity on Purchase Order
 - Quantity on Sales Order
 - Preferred Vendor (name and number)
 - Preferred Vendor Item Number
- **Easier setup for printing to email.** A new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings.
- **More flexibility to change National Accounts.** In Accounts Receivable, you can now change the national account for a customer even if there are outstanding transactions for the customer.
- **Improved Help menu.** The Help menu has an improved design, including several new options, to get you to the appropriate help resource when you need it.
- **Improved validation on P/O Receipt Entry screen.** In Purchase Orders, the Receipt Entry screen now prevents you from entering duplicate invoice numbers for the same vendor.
- **Import templates.** New import template files show the minimum fields required for various record types (such as A/R customers or I/C items). The data in these templates are based on Sage 300 Sample Data. Import templates can be found in the ImportTemplates folder in the Sage 300 Shared Data folder.
- **Improved error messages in day-end processing.** If a problem occurs during day-end processing, improved messages help you identify the cause of the problem.

Sage 300c Web Screens

If you use Sage 300c web screens, the following new web screens and features are available:

- **New Order Entry web screens and features.** This release includes the following new Sage 300c web screens for Order Entry:
 - **Invoice Entry.** Use this screen to enter and manage invoices.
 - **Shipment Entry.** Use this screen to enter and manage shipments.
 - **Capture Payments with Invoices.** Use this screen to capture and invoice pre-authorized credit card payments for multiple orders or shipments.
- **Improved navigation in tables.** You can now navigate around table cells and rows using the arrow keys on your keyboard.

- **Easily look up Accounts Receivable documents.** A new Inquiry feature makes it easy to look up A/R documents. This feature is available from the web toolbar, the A/R Customers screen, and some transaction entry screens in Accounts Receivable and Order Entry.
- **Tax-related fields for Malaysia and Singapore.** The following fields, which are required for tax purposes in some jurisdictions (such as Malaysia and Singapore), are now available in Sage 300c web screens:
 - **Business Registration Number.** This field allows you to enter business registration numbers for your company, customers, and vendors. It appears on the Company Profile, A/R Customers, and A/P Vendors screens.
 - **Import Declaration Number.** This field allows you to enter import declaration numbers for imported goods. It appears on the P/O Invoice Entry screen.
- **Check customer credit status.** A new Credit Status tab on the A/R Customers web screen displays credit status, outstanding balances, and other credit-related information for customers and national accounts. (This information was previously available only on the A/R Customer Inquiry screen in Sage 300 classic screens.)
- **Improvements to the Sage 300 Web API.** The Sage 300 Web API now supports the \$select operator, which allows you to select properties to include in a response. For more information, run Swagger in <http://localhost/sage300webapi>.
- **Sage 300 Web API security authorizations.** To give you more control over access to Sage 300 Web API features, a new **Sage 300 Web API** security authorization is available for Common Services, Bank Services, Tax Services, General Ledger, Accounts Receivable, Accounts Payable, Inventory Control, Order Entry, and Purchase Orders.

Sage 300 Classic Screens

The following new features and improvements are available in Sage 300 classic screens:

- **Easier setup and new SMTP option for printing to email.** A new Email tab on the Company Profile screen makes it easier to set up and manage print-to-email settings for Sage 300 classic screens. You can send email using Microsoft Outlook, or you can select the new **Use SMTP** option to use an SMTP (Simple Mail Transfer Protocol) service to send documents via email.
- **Customize how Order Entry handles price and credit limit overrides.** The OE.INI file includes a new **UsernamePasswordToOverride** customization option, which lets you specify how unit price limit overrides and credit limit overrides are approved in O/E transaction entry screens. For more information, see Knowledgebase article [21367](#).

Product Update 2 Program Fixes

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

Notes in Sage 300 Classic Screens

- Fixed a problem that prevented notes (displayed on the Notes screen) from appearing for vendors or customers if the vendor or customer number included a space.

Item Finder in Sage 300c Web Screens

- Fixed a problem on some web screens that could prevent you from entering an item number that

included a hyphen. This problem occurred if your system does not use hyphens as separators in item structures (this setting is specified on the I/C Options screen). For more information, see Knowledgebase article [82279](#).

User-specific table customization in Sage 300c Web Screens

- Fixed a problem that prevented user-specific table customizations from being saved in some Sage 300c web screens. For more information, see Knowledgebase articles [81774](#) and [82274](#).

Bank Services

- Fixed a problem that caused Sage 300 to stop working if you exported bank reconciliation data. For more information, see Knowledgebase article [80207](#).
- Fixed a problem that occurred in Sage 300c web screens on the Reconcile Statements screen, which prevented you from drilling down to A/P Payments. For more information, see Knowledgebase article [82336](#).

Accounts Receivable

- For Sage 300c web screens:
 - Fixed a problem that occurred if you opened the Receipt Entry screen from the Receipt Batch List screen, which caused some information and fields to be displayed incorrectly on the Receipt Entry screen. For more information, see Knowledgebase article [81936](#).
 - Fixed a problem that prevented you from creating ship-to locations for a customer whose customer number includes the character "&". For more information, see Knowledgebase article [82515](#).

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](#).
- Fixed a problem that could cause the Excel status bar to disappear when using Financial Reporter - Statement Designer reports. For more information, see Knowledgebase article [81770](#).
- Improved performance when creating recurring entries batches. For more information, see Knowledgebase article [81980](#).

Inventory Control

- Fixed a problem that caused Sage 300 to stop working if you posted a transaction from the Lot Recalls/Releases screen. For more information, see Knowledgebase article [79983](#).
- Fixed a problem that could cause an error message to appear when running Day End Processing for an invoice adjustment on a lot or serial costed item. For more information, see Knowledgebase article [80706](#).

Order Entry

- Fixed a problem with the Taxes tab on transaction entry screens (such as Order Entry and Shipment Entry), which could cause the tax amount for a tax authority to be calculated incorrectly as zero if tax is calculated by user-defined alternate costs. For more information, see Knowledgebase article [57242](#).
- Fixed a problem on the Invoice Entry screen that could cause the standard cost for an invoice to be calculated incorrectly as zero if the order UOM used the pricing unit by default.

Project and Job Costing

- Fixed a problem that could incorrectly cause a “Sage 300 UI Container has stopped working” error message to appear if you entered timecard start and end dates that are in different calendar years. For more information, see Knowledgebase article [80772](#).

Sales Analysis

- Fixed a problem that caused **Retrieve Details, SQL Server** to stop working when running Retrieve Details UX2100.EXE using Task Scheduler or from command prompt C:\Sage300folder\UX64A\ SCHEDULER\UX2100 0 AUTO. For more information, see Knowledgebase article [80282](#).

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](#).

System Diagnostic Utility

- Fixed a problem that caused an “a4wdiag.exe has stopped working” message to appear and prevented the System Diagnostic utility from creating the A4WDIAG.LOG file. For more information, see Knowledgebase article [81561](#).

Sage 300 SDK

- Fixed a problem that could prevent programs from working if they were not created with the newest version of the SDK.

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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 300c Web Screens

If you use Sage 300c web screens, the following new web screens and features are available:

- **Sage Intelligence Reporting Cloud.** Sage Intelligence Reporting Cloud is a business intelligence solution that helps you gain better visibility into your business with dynamic financial reports that you can export and customize in Microsoft Excel or Excel.
- **Redesigned toolbar and menus give you more space.** We've improved the design of the web screens toolbar and menus to give you a little more room to work.
- **User-specific customization of web screens and the Reports list.** This release includes a new UI Profiles web screen that you can use to define groups of users (you create a UI profile and then assign users to it). When adding a report link to the Reports list, you specify which groups of users (UI Profiles) will see the report. When customizing a web screen, you specify which groups of users (UI Profiles) will see the customized version of the screen.

Warning! This product update removes any existing customized versions of web screens. After installing this update, you must recreate any customizations that existed previously.

- **Import and manage customizations for web screens.** If you or your Sage business partner use the

Sage 300 Web Screens SDK to create customizations for web screens, new administration screens enable you to import customization packages and manage individual customizations.

- **New General Ledger web screens and features.** This release includes additional web screens from General Ledger (Account Permissions and Create Revaluation Batch) that you can use to set up account permissions and manage currency revaluation.

Sage 300 Classic Screens

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.

For more information on new features and enhancements, see *What's New in Sage 300 2017*.

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Product Update 1 Program Fixes

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

Importing and Exporting

- Fixed a problem that could prevent you from importing data to a Sage 300c web screen after exporting the data from the corresponding desktop screen. (Small differences in field names in the exported Excel file caused the import to fail.)

System Manager

- Fixed a problem that could cause unexpected characters to appear in a database's description in Database Setup. The problem occurred if the **Doing Business As** field in the Company Profile was blank. For more information, see Knowledgebase article [78374](#).

Bank Services

- If a transaction is cleared on the Reconcile Statements screen, you cannot select and reverse the transaction on the Reverse Transactions screen. To reverse a transaction on the Reverse Transactions screen, you must first use the Reconcile Statements screen to change the transaction's status to **Outstanding**. For more information, see Knowledgebase article [77054](#).

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](#).

Purchase Orders

- Fixed a problem that caused the Receipt Entry screen to stop working if you entered an additional cost that did not use the same currency as the receipt vendor.

Sage CRM Integration

- Fixed a problem that occurred when running Sage CRM Workstation Setup, which prevented you from installing the Sage CRM Synchronization Component if an earlier version of the component was installed on the workstation.

- Sage CRM 2017 is now supported.

Ops Inquiry

- Fixed a problem that occurred if you use multiple monitors, which could prevent you from opening screens on monitors other than your primary monitor. For more information, see Knowledgebase article [75118](#).

Sales Analysis

- Fixed a problem that occurred if you use multiple monitors, which could prevent you from opening screens on monitors other than your primary monitor. For more information, see Knowledgebase article [75118](#).

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](#).

Item Number Change

- Fixed a problem that could cause an "I/C Unit of Measure: New record already exists" message to appear when combining items. This occurred if the items had similar units of measure (for example, "Ea." and "ea.") and the SQL collation method was case insensitive.

G/L Consolidations

- Fixed a problem that could incorrectly cause a "UI Container Has Stopped Working" error message to appear when exporting data. For more information, see Knowledgebase article [79927](#).

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