

# Sage 300 2017

What's new

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# What's new in Sage 300 2017

Sage 300 2017 includes new features and improvements, including:

- New financial management and administration web screens, as well as improvements to many existing web screens.
- A new Notes feature lets you add and manage notes for customers, vendors, and inventory items.
- One-click processing for credit card transactions in Accounts Receivable and Order Entry.

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.**

## Sage 300 web screens

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

For information about using the new web screens and features, see the online help at:

[help.sage300.com](http://help.sage300.com)

## Redesigned web screens help you get more done

We've made a number of design enhancements to improve workflow and efficiency on frequently used web screens so you can get more done.

- **Easily hide infrequently used fields and controls on key transaction entry screens.** We've organized fields and controls on frequently used transaction entry screens into collapsible sections, making it easy to hide the fields and controls you use less often.

The screenshot displays the 'Shipment Details' web screen. At the top, there is a header with an upward-pointing arrow and the text 'Shipment Details'. Below this, the screen is organized into several sections. The first section contains three fields: 'Ship-To Location Code' with a menu icon, 'Default Location Code' with a search icon, and 'Location Description' with a search icon. The second section contains three fields: 'Ship-Via Code' with a search icon, 'Ship-Via Description' with a search icon, and 'Shipment Tracking Number' with a search icon. The fields are arranged in a grid-like fashion, demonstrating the redesigned layout.

The following screens have been redesigned to include collapsible sections:

- **Accounts Payable:** Invoice Entry and Payment Entry.
- **Accounts Receivable:** Invoice Entry and Receipt Entry.
- **Order Entry:** Order Entry.
- **Scroll less, see more.** Fields and controls have been organized on most transaction entry screens so you can see more without scrolling.
- **See and use more columns in data entry tables.** Detail entry tables are wider on transaction entry screens, so you can see and use more columns without scrolling.

	Taxes	Line Number	Item Number	UOM	Description	Quantity	Unit Price	Extended Amount	Extended Cost	Distribution Code
<input type="checkbox"/>	/	1	BK-360	EA	Swivel Mounting Bracket	1.00000	117.000000	117.00	55.50	ITEM
<input type="checkbox"/>	/	2	CA-78	FT	RG 78 Thick Cable	1.00000	2.250000	2.25	1.09	ITEM
<input type="checkbox"/>	/	3	CA-78	FT	RG 78 Thick Cable	1.00000	2.250000	2.25	1.09	ITEM

## Smarter, simpler processing for credit card transactions

If you use Payment Processing:

- New buttons appear on Sage 300 web screens you use to process credit card transactions, enabling you to process transactions with one click.

### Quick Pre-authorize

This button appears on the O/E Order Entry screen.

### Quick Charge

This button appears on the following screens:

- A/R Prepayments (which you open from the A/R Invoice Entry screen)
- A/R Receipt Entry

- O/E Prepayments (which you open from the O/E Order Entry screen)

**Note:** The **Pre-authorize** and **Charge** buttons are still available for situations when you need full control over transaction details.

- In Accounts Receivable, a new Process Credit Card Payments screen allows you to process credit card payments from your customers for multiple invoices.

**A/R Process Credit Card Payments**

Invoices Due On or Before:   Print Receipts After Processing Payments

	From	To
Customer Number	<input type="text"/>	<input type="text"/>
Customer Group	<input type="text"/>	<input type="text"/>
Invoice Number	<input type="text"/>	<input type="text"/>
Processing Code	<input type="text"/>	<input type="text"/>
Terms Code	<input type="text"/>	<input type="text"/>

[Apply](#)

[Edit Columns](#)

Apply	Processing Code	Invoice Number	Customer Number	Customer Name	Payment Number	Current Balance
Pending	PUSD2	IN0000000000003	1105	Bargain Mart - ...	1	188.79
Yes	PUSD2	IN0000000000008	1105	Bargain Mart - O...	1	188.79
Yes	PUSD2	IN0000000000025	1105	Bargain Mart - O...	1	687.82
Yes	PUSD2	IN0000000000037	1105	Bargain Mart - O...	1	1227.12
Yes	PUSD2	TR-INV-002	1105	Bargain Mart - O...	1	1016.48
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	1	7783.29
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	2	4393.70
Yes	PUSD2	TR-INV-008	1105	Bargain Mart - O...	3	2929.14
Yes	PUSD	TR-CRE-006	1200	Mr. Ronald Black	1	264.61
Pending	PUSD	TR-INV-003	1200	Mr. Ronald Black	1	105967.65

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[Apply None](#) [Restore Defaults](#) [Process Payments](#)

- On the Payment Processing Options screen, a new **Allow Terms Discount on Credit Card Receipts** option allows you to specify whether terms discounts (as specified on invoices) are available on the A/R Process Credit Card Payments screen.
- On the A/R Credit Card Information screen, a new **Approved for Automatic Payments** option indicates whether a customer has given you formal approval to charge their default credit card automatically (without contacting them) when invoices are due.

**Note:** To use a credit card on the new A/R Process Credit Card Payments screen, both the **Approved for Automatic Payments** option and the **Use This as Default Card** option must be selected for the card.

- You can now process payments using smart cards (credit cards that have a built-in chip).

## Add and manage notes for customers, vendors, and inventory items

Use the web toolbar to add notes to customers, vendors, and inventory items, and to manage notes, in the handy new Notes panel.

**Notes** + Create New ✕

Show Notes For: Customers ▼      Status: Active ▼

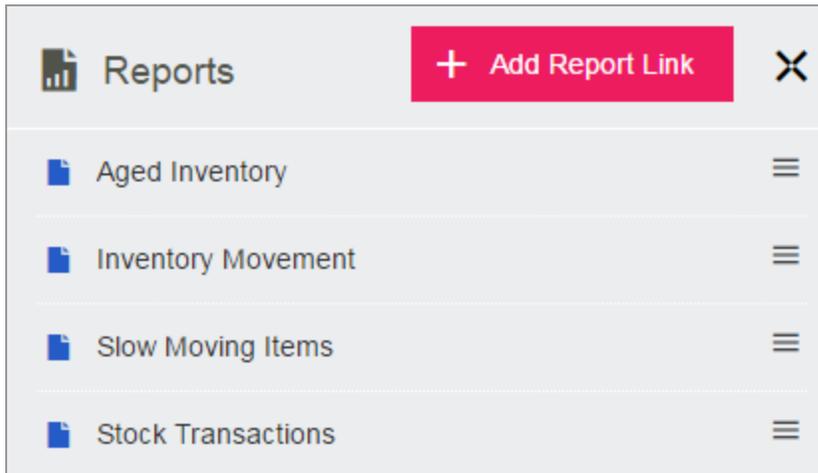
Customer Number: 1100 ↶ 🔍

Account manager changed recently (Sarah)  
✕ Dismiss 🖋 Edit 🗑 Delete

Extend terms deposit. See Jean for info.  
✕ Dismiss 🖋 Edit 🗑 Delete

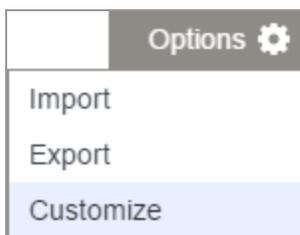
## Create shortcuts to customized reports

If you use customized SAP Crystal Reports®, a new Reports list lets you create a list of links to the custom reports you and your team use most often.



## Customize fields and controls on web screens

Administrative users can use a new **Customize** option to show and hide fields and controls, and to change text labels for fields and controls, on most web screens.



## New Financial Management web screens and features

This release includes additional web screens from General Ledger, Accounts Payable, and Accounts Receivable that you can use to create accounts and to enter, manage, inquire on, and process transactions and transaction batches.

The following web screens are now available:

- **G/L Accounts:** Create Accounts, Transaction History.
- **A/P Transactions:** Adjustment Entry, Adjustment Batch List.
- **A/R Transactions:** Process Credit Cards, Quick Receipt Entry, Receipt Inquiry, Refund Entry, Refund Inquiry, Refund Batch List, Adjustment Entry, Adjustment Batch List.
- **A/R Periodic Processing:** Update Recurring Charges.

On the A/P Invoice Entry screen, a new **Import Declaration Number** field allows you to specify an import declaration number for an invoice.

## New Tax Services web screens

This release includes new web screens from Tax Services (Tax Clear History and Tax Tracking Report) that you can use to manage and report on tax information.

## New Bank Services web screen

This release includes a new Bank Credit Card Types web screen that you can use to add and manage credit card types in Bank Services.

## New Administration web screens

This release includes new web screens from Administrative Services (User Authorizations and Security Groups) that you can use to manage users and security.

## Faster, more convenient transaction posting

Batch list and transaction entry screens in General Ledger, Accounts Payable, and Accounts Receivable have been updated to make it easier to post transactions.

- Most batch list screens in General Ledger, Accounts Payable, and Accounts Receivable now include a **Post All** button.
- Most transaction entry screens in Accounts Payable and Accounts Receivable now include a **Post** button.

- The Reconcile Statements screen in Bank Services now includes a **Post** button for posting bank reconciliations.

## Drill down to posting journals and posting errors from batch list screens

Batch list screens in Accounts Payable and Accounts Receivable have been updated to support drilldown to posting journals and posting error reports.

On most batch list screens in Accounts Payable and Accounts Receivable:

- A new Edit  button in the Posting Sequence column opens the Posting Journals report for the selected batch.
- A new Edit  button in the Number of Errors column opens the Posting Errors report for the selected batch.

## New Web API for developing integrated services

A Sage 300 Web Application Program Interface (API) is now available as part of the Software Development Kit (SDK) for members of the Sage Development Partner Program.

The Sage 300 Web API makes it easier than ever to develop services that integrate with Sage 300 data and business logic. You can use the Web API to create integrated services for Sage 300 using many frameworks and tools—even just a web browser.

This release of the Web API includes a limited set of initial features, with additional features planned for future product updates and releases.

To download documentation and get started, see Sage Knowledgebase article [75211](#).

For more information about partner programs, visit [sage.com/us/partners](https://sage.com/us/partners).

## Sage 300 classic screens

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

### Add and manage notes for customers, vendors, and inventory items

A new **Notes** button on the Sage 300 desktop toolbar lets you add and manage notes for customers, vendors, and inventory items.

For more information, see the "Adding and Managing Notes" topic in the System Manager Help.

### Changes and new features in 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.

### Changes and new features in Accounts Receivable

If you use Payment Processing:

- A new **Quick Charge** button enables you to process credit card payments with one click. This button appears on the following screens:
  - Prepayments (which you open from the Invoice Entry screen)
  - Receipt Entry

**Note:** The **Charge** button is still available for situations when you need full control over transaction details.

- A new **Process Credit Card Payments** screen allows you to select pending invoices for multiple customers and process payments for those invoices with a single click. Previously, it was possible to process credit card payments for only one customer at a time.

- A new **Approved for Automatic Payments** option on the Credit Card Information screen indicates whether a customer has given you formal approval to charge their default credit card automatically (without contacting them) when invoices are due.

**Note:** To use a credit card on the new Process Credit Card Payments screen, this option must be selected for the card.

## Changes and new features in Order Entry

- If you use Payment Processing, the following new buttons enable you to pre-authorize or process credit card payments with one click:
  - **Quick Pre-authorize.** This button appears on the Order Entry screen.
  - **Quick Charge.** This button appears on the Prepayments screen, which you open from the Order Entry, Shipment Entry, or Invoice Entry screens.

**Note:** The **Pre-authorize** and **Charge** buttons are still available for situations when you need full control over transaction details.

## Changes and new features in Payment Processing

- Sage Exchange Desktop 2.0 allows you to process payments using smart cards (credit cards that have a built-in chip).

### **Important!**

- You must install Sage Exchange on every workstation you will use to process credit card transactions.

To download Sage Exchange, visit

<https://www.sageexchange.com/install/sageexchangedesktopbootstrapper.zip>.

- If you have Sage Exchange Desktop 1.0 installed, you must uninstall it before you can install Sage Exchange Desktop 2.0.

- On the Options screen, a new **Allow Terms Discount on Credit Card Receipts** option allows you to specify whether terms discounts (as specified on invoices) are available on the A/R Process Credit Card Payments screen.

## Changes and new features in Sales Analysis

If you use Technisoft Service Manager, Sales Analysis now supports Cost Only transactions.

**Note:** Cost Only transactions that were processed before you installed Sage 300 2017 are not included automatically in Sales Analysis, but can be flagged for retrieval. For more information, see Knowledgebase article [74010](#).

## Changes and new features in Sage 300 Intelligence Reporting

New reports are available via the Report Utility. For more information, see <https://www.sageintelligence.com/report-utility/sage-300>.