

# Sage 300 2016

What's New

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# 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.
- 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.*

## 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*.

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## 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.

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## 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.