

# What's New in Sage 300 2022.0

*Product Update*

*August 2021*



# Safe Harbour Statement



Statements regarding our product development initiatives, including new products and future product upgrades, updates or enhancements represent our current intentions, but may be modified, delayed or abandoned without prior notice and there is no assurance that such offering, upgrades, updates or functionality will become available unless and until they have been made generally available to our customers.

# Contents



- **Overview of What's New in Sage 300**
- **Sage 300 2022.0 Release Features**
- **Live Demonstration**
- **Q&A**

# Benefits of Sage 300 2022.0



## Better User Experience

- ✓ Greater productivity
- ✓ Less training/retraining
- ✓ Higher employee satisfaction

## Advanced Capabilities & Flexibility

- ✓ Improve efficiency
- ✓ Gain better business insight
- ✓ Less workarounds/manual processes

## Better User Experience

- Web Screen Improvements
- Desktop Screen Enhancements
- Sage Data & Analytics Access
- Enhanced 3<sup>rd</sup> Party Help

## Advanced Capabilities & Flexibility

- Purchase Order Improvements
- Order Entry Improvements
- Reserve LanPak
- Bank Feeds Improvement



# Better User Experience

Web Screen Improvements

Desktop Screen Enhancements

Sage Data & Analytics Access

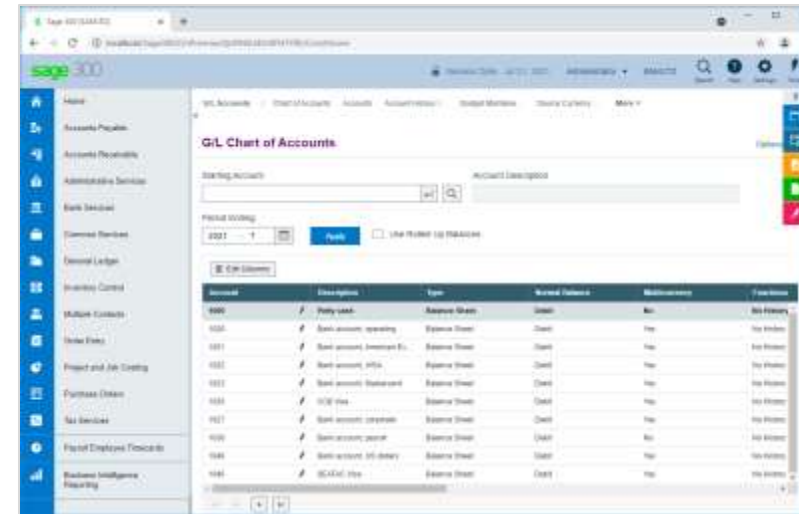
Enhanced 3<sup>rd</sup> Party Help

# New Web Screens



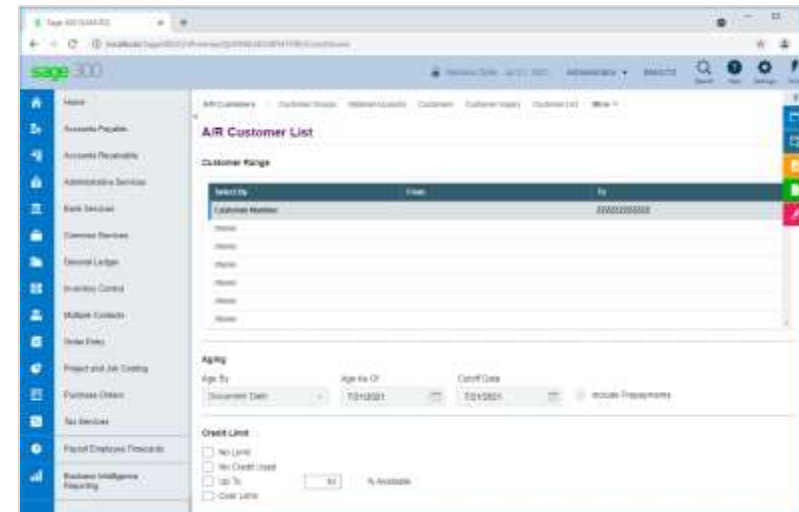
## General Ledger

- Chart of Accounts



## Accounts Receivable

- AR Customer List



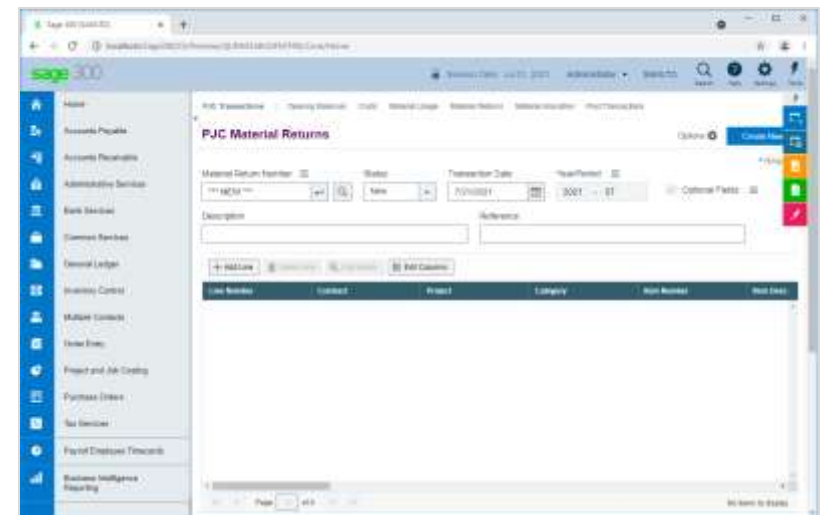
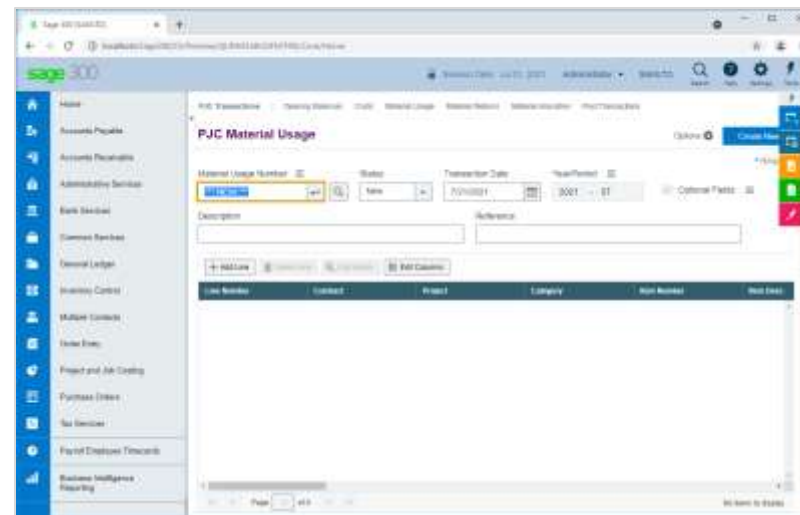
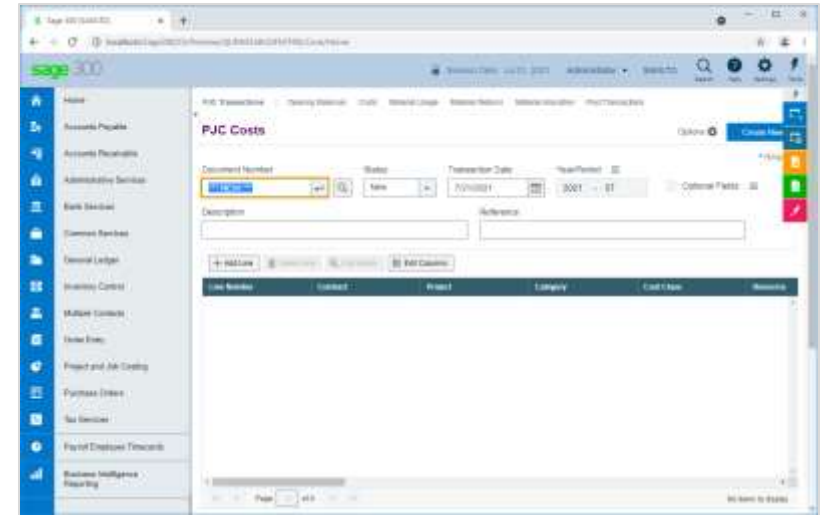
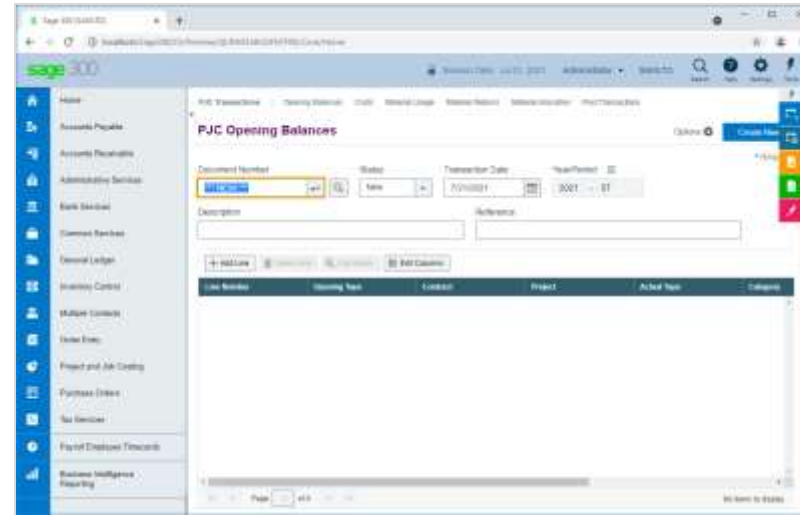
For Sage 300cloud only

# New Web Screens



## Project And Job Costing Transaction Screens

- Opening Balance
- Costs
- Material Usage
- Material Returns



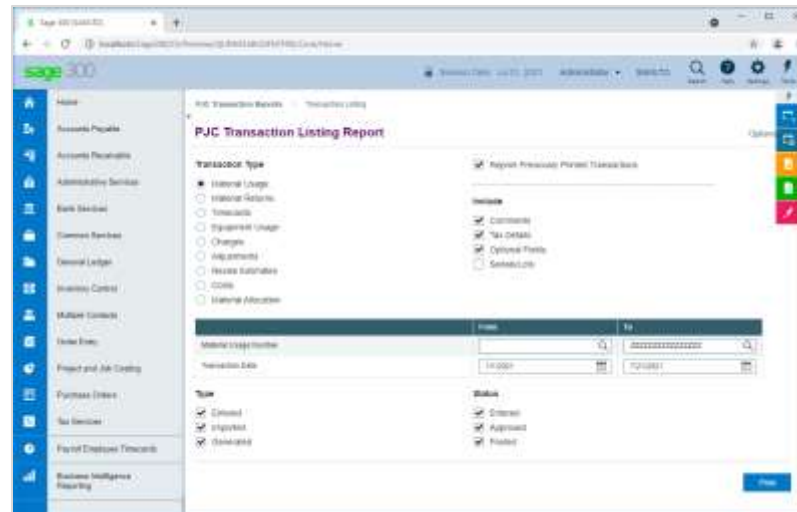
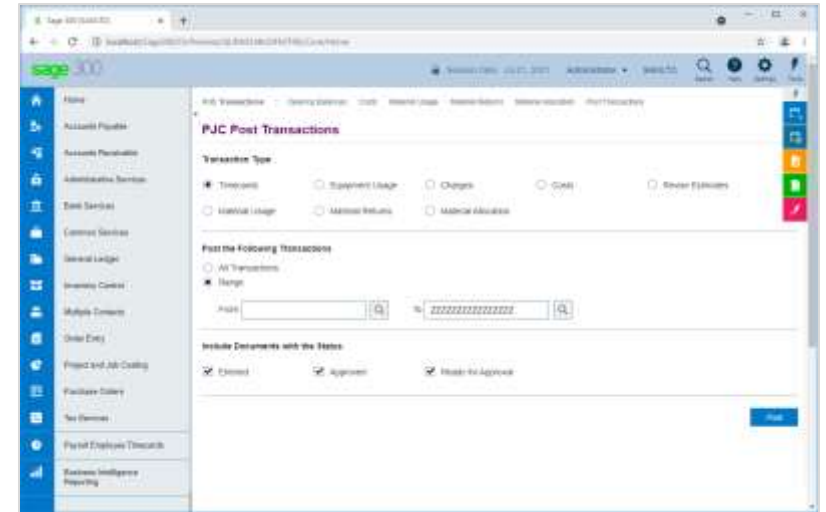
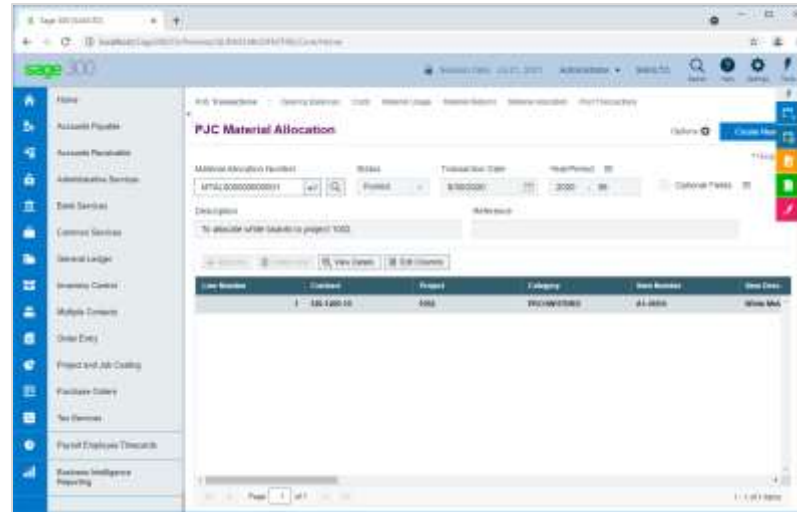


# New Web Screens



## Project And Job Costing

- Material Allocation
- Post Transactions
- Print Transaction Listing



# New Web Screens



## Reminder List

The screenshot shows the Sage 300 web interface. The browser address bar displays 'localhost/Sage300/OnPremise/QL/RNSU4IU0FNTFRE/Core/Home'. The Sage 300 logo is in the top left, and the session information 'Session Date Jul 21, 2021 Administrator: SAMLTD' is in the top right. A left-hand navigation menu lists various modules such as Home, Accounts Payable, Accounts Receivable, Administrative Services, Bank Services, Common Services, General Ledger, Inventory Control, Multiple Contacts, Order Entry, Project and Job Costing, Purchase Orders, Tax Services, Payroll Employee Timecards, and Business Intelligence Reporting. The main content area is titled 'Reminder List' and includes a dropdown menu set to 'Due Personal Schedules' and an 'Edit Columns' button. Below this is a table with the following data:

Schedule Code	Schedule Description	Processed	Run Date	Last Run Date
MONTHLY	Monthly schedule	No	7/1/2021	
WEEKLY	Weekly schedule	No	7/19/2021	

At the bottom of the screen, there is a pagination control showing 'Page 1 of 1' and '1 - 10 of 10 items', along with 'Schedule' and 'Process' buttons.

# Redesigned Finder



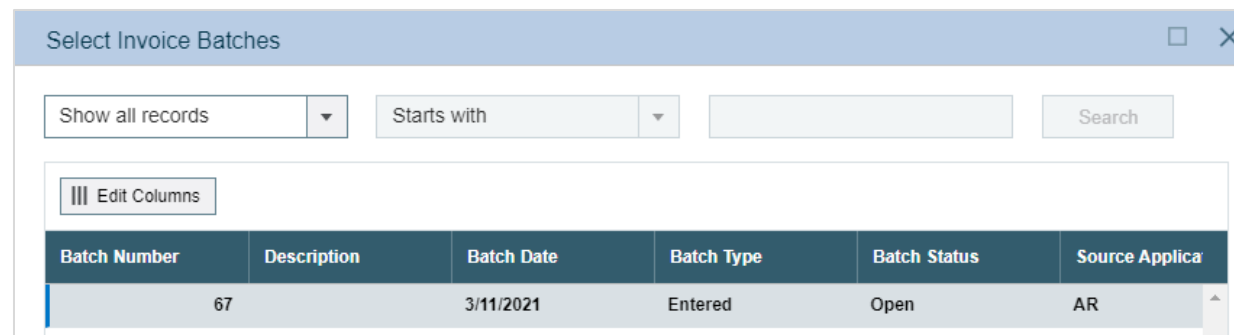
The Finder improves filtering and makes it easier to navigate through large sets of results

## Filtering improvements:

- Persistent filtering to help set default search.
- Additional filtering options, now make highlighting first and last record easier.
- Filtering option is set to 'Show all records' so users can view previous and next records by default.
- Users may also change the size of the finder.

## Usability improvements:

- Aligned more with the desktop functionality
- Improved keyboard accessibility





## Better User Experience

Web Screen Improvements

Desktop Screen Enhancements

Sage Data & Analytics Access

Enhanced 3<sup>rd</sup> Party Help

# 64-bit Financial Reporter



- Increased compatibility with several business software
- Users now have seamlessly use General Ledger Financial Reporter with either 32 or 64-Bit Microsoft Excel.

Segment Name	From	To	Report As
Division		ZZZ	Consolidated
Region		ZZ	Consolidated

Note that users can either upgrade to 64-bit Sage Financial Reporter or leave it at 32-bit and upgrade at their own pace in future.

For Sage 300 only



## Better User Experience

Web Screen Improvements

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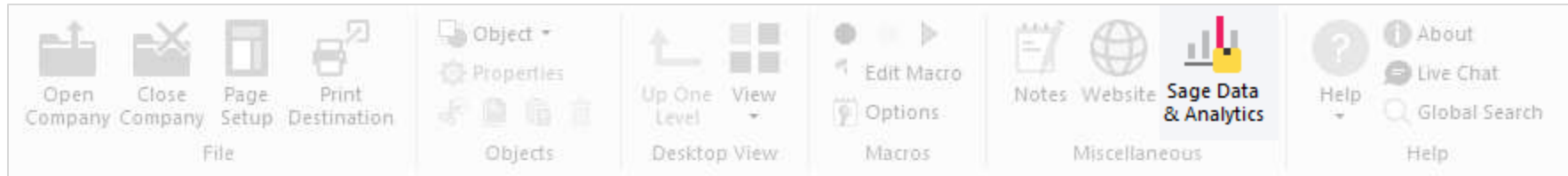
Enhanced 3<sup>rd</sup> Party Help

# Sage Data & Analytics Menu

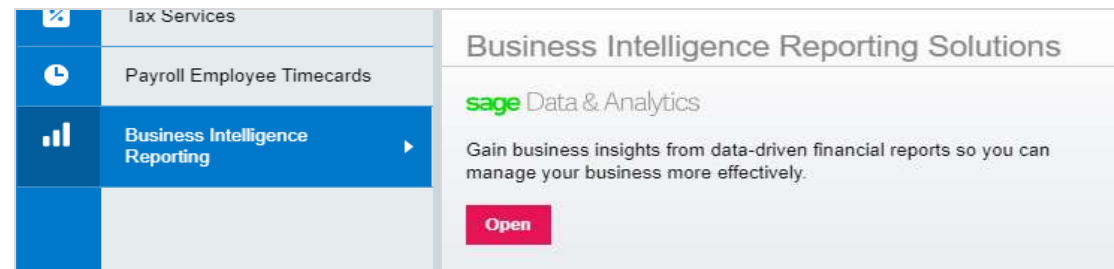


New options to start Sage Data & Analytics from within Sage 300

- Desktop Screens:



- Web Screens:

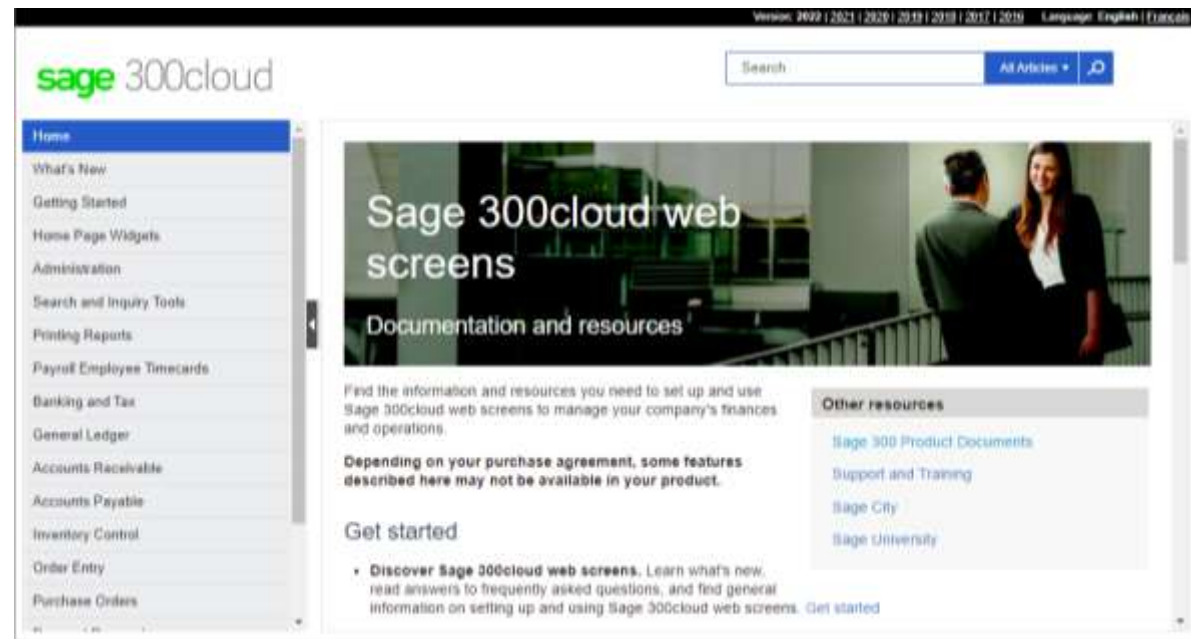


For Sage 300 and Sage 300cloud

# Enhanced 3rd Party Help



- 3<sup>rd</sup> party applications can now link and drop their content in Sage 300 help menu.
- Users can find the information and resources needed to use these 3<sup>rd</sup> party applications with Sage 300.



For Sage 300 and Sage 300cloud



# Advanced Capabilities & Flexibility

Purchase Orders  
Order Entry  
Reserve LanPak  
Bank Feeds



# Purchase Order Improvements



- Users can enter negative additional costs on purchase order credit notes.
- Users can now also mass update the Location or Expected Ship Date in Order detail lines.

The screenshot shows the 'SAMLTD - P/O Credit/Debit Note Entry' window. The 'Document Number' is 12345 and the 'Vendor Number' is 1200 (Chloride Systems). The 'Additional Costs' tab is active, showing a table with one entry:

Lin	Additional Cost	Description	Amount	Proration Method	Distribute Proration	Expense Account
1	SHP	Shipping charges	-35.00	No Proration	No	6600

Buttons at the bottom include 'Cost/Tax...', 'Calc. Taxes', 'Post', 'History...', and 'Close'.

The screenshot shows the 'SAMLTD - P/O Purchase Order Entry' window. The 'PO Number' is 'NEW' and the 'Vendor Number' is 1200 (Chloride Systems). The 'Order' tab is active, showing various fields like 'PO Date' (06/30/2020), 'PO Type' (Active), and 'Ship-To Location' (1). A table of order lines is visible:

Lin	Completed	Item Number	Item Description	Location	Drop Ship	Quantity Ordered	Unit of Measure	Unit Cost
1	No	A1-103/0	Fluorescent Desk Lamp	1	No	10	Ea	19.826603
2	No	A1-105/0	13W Mini Fluorescent Sub	1	No	30	Ea	3.346839

Buttons at the bottom include 'Item/Tax...', 'Calc. Taxes', 'Consolidate', 'Set Arrival Date', 'Set Location', 'Order Subtotal', 'Post', 'History...', and 'Close'.

For Sage 300 and Sage 300cloud

# Order Entry Improvements



- Users now can mass update the Location or Expected Ship Date in Order detail lines.

Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
70	15	60	0	70
378	23	510	0	378

For Sage 300 and Sage 300cloud

# Reserve LanPak User Licenses



- Users can now reserve one or several LanPak user licenses for a user or any 3rd party product.
- LanPak license provides specific users uninterrupted access to Sage 300.

The screenshot shows a web application window titled "SAMLTD - Users". The interface includes a menu bar with "File" and "Help". Below the menu, there is a search bar containing "RMAY" with navigation and search icons. The main area displays user details in a form:

User ID	RMAY	Language	English
User Name	Renee May	Job Role	CFO/VP of Finance
Account Type	User	Windows Domain	<input type="text"/>
Authentication Method	Sage 300	<input type="button" value="Browse"/>	<input checked="" type="checkbox"/> Reserve a LanPak License

Please, refer to the Reserve LanPak Licenses video.

For Sage 300cloud only

# Bank Feeds Improvement



- Improvements to Bank Feeds on the Reconcile E-Statements screen
- Users now have additional ways to reconcile bank transactions
- Transactions downloaded using a bank feed now have a Bank Cleared Date based on your local time

Cheq/Id	Bank Cheq/Id	Transaction Type	Transaction No.	Reference	Comment 1	Transaction Am.	Transaction Cur.	Source Amount	Source Currency	Exchange Rate	Comment 2
No	2020-02-11	Deposit	ref 12345	CASH		100,000	CAD	100,000	CAD	1.0000000	Transaction No.
No	2020-02-11	Withdrawal	Check 12345	9990	Payment 9990	75,000	CAD	75,000	CAD	1.0000000	Payment 9990
No	2020-02-14	Deposit	17344	L17344		86,000	CAD	86,000	CAD	1.0000000	Invoice 7055 Ga.
No	2020-02-14	Withdrawal	8525	8525	8525 15-775	54,500	CAD	54,500	CAD	1.0000000	8525 15-775
No	2020-02-14	Deposit	P00001	Try	Smith	66,230	CAD	66,230	CAD	1.0000000	Smith Try P000
No	2020-02-14	Withdrawal				777,810	CAD	777,810	CAD	1.0000000	
No	2020-02-14	Deposit	90001	C90001	C90001 90001	66,660	CAD	66,660	CAD	1.0000000	C90001 90001
No	2020-02-14	Withdrawal		BANK FEE	BANK FEE	87,500	CAD	87,500	CAD	1.0000000	BANK FEE
No	2020-02-15	Deposit		7898		15,100	CAD	15,100	CAD	1.0000000	7898
No	2020-02-15	Withdrawal		C-105 D-306		11,990	CAD	11,990	CAD	1.0000000	C-105 D-306
No	2020-02-15	Deposit		7588		54,000	CAD	54,000	CAD	1.0000000	7588
No	2020-02-16	Withdrawal	1156	1156	1156	55,560	CAD	55,560	CAD	1.0000000	1156
No	2020-02-16	Deposit		8775		75,000	CAD	75,000	CAD	1.0000000	8775
No	2020-02-17	Withdrawal		H58C		50,000	CAD	50,000	CAD	1.0000000	H58C
No	2020-02-18	Deposit		Chf		345,560	CAD	345,560	CAD	1.0000000	Chf
No	2020-02-18	Withdrawal				0,990	CAD	0,990	CAD	1.0000000	
No	2020-02-18	Deposit		Hellfax One		202,220	CAD	202,220	CAD	1.0000000	Hellfax One
No	2020-02-19	Withdrawal		Santander 123		303,330	CAD	303,330	CAD	1.0000000	Santander 123
No	2020-02-19	Deposit	56789	Sharia	Sharia 56789	2,103,090	CAD	2,103,090	CAD	1.0000000	Sharia 56789
No	2020-02-19	Withdrawal	85263	85263	85263	1,273,080	CAD	1,273,080	CAD	1.0000000	85263

For Sage 300 and Sage 300cloud

# Additional Changes

# Additional Changes to Sage 300 2022.0



## **Integration Access Pack (IAP) : End-of-Life**

- Sage will be discontinuing Integration Access Packs (IAP) used in some 3rd Party Applications that integrate to Sage 300. After customers upgrade to 2022.0, IAPs will not be accessible and users will be automatically switched to consume LanPaks to access data, or the system.
- Additionally, as of 2022.0 we're providing the ability to "Reserve LanPaks" and key users or 3rd Party Applications can be flagged as a designated user, allowing them to always have access to Sage 300.

## **Sage Contact app : End of support**

- Sage Contact app, which could be used for viewing and managing Sage 300 customer information within Microsoft Outlook as part of the Microsoft 365 integration is no longer supported.

## **.NET Remoting : End of support**

- .Net Remoting will no longer be supported by Sage 300.

**It's Demo Time!**



# Questions

**Thank you**

**sage**

# Customer Support Materials

# References and Training



The following materials have been created to assist customers with the 2022.0 release.

## *Release Notes*

[Link](#)

## *Sage University Courses*

[English](#)

[French](#)

## *Videos*

*What's New in Sage 300 2022.0*     [EN](#)     [FR](#)

*Reserve LanPak Licenses*     [EN](#)     [FR](#)

*Purchase Order Improvements*     [EN](#)     [FR](#)

*Order Entry Improvements*     [EN](#)     [FR](#)

## *KB Articles*

[Sage 300cloud](#)

[KB 112189](#)



13270 Yonge Street, Suite 204  
Richmond Hill, ON  
L4E2T2  
Canada

800-372-6174

[pur-logicsolutions.com](http://pur-logicsolutions.com)

**sage**