



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

Sage 300 | What's New in August 2022.0 release

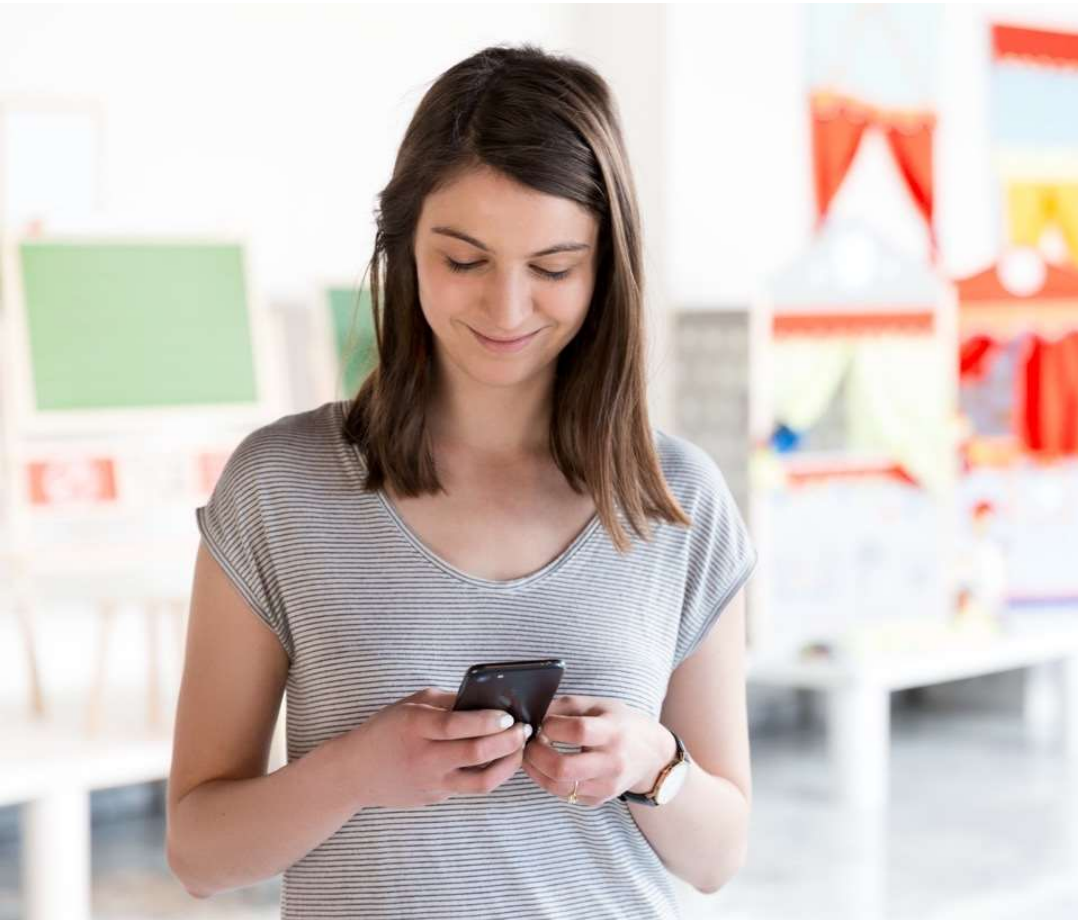


Better User Experience

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

Advanced Capabilities & Flexibility

- Purchase Order Improvements
- Order Entry Improvements
- Reserve LanPak



Better User Experience

Web Screen Improvements

Desktop Screen Enhancements

Sage Data & Analytics Access

Enhanced 3rd Party Help

New Web Screens



General Ledger

- Chart of Accounts

The screenshot shows the 'G/L Chart of Accounts' screen in Sage 300. The left sidebar contains a navigation menu with options like 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 area displays a table of accounts with columns for Account, Description, Type, Normal Balance, Multicurrency, and Functions. The table lists various accounts including Petty cash, Bank account, operating, Bank account, American Ex..., Bank account, VISA, Bank account, Mastercard, CCB Visa, Bank account, corporate, Bank account, payroll, Bank account, US dollars, and SEATAC Visa.

| Account | Description | Type | Normal Balance | Multicurrency | Functions |
|---------|------------------------------|---------------|----------------|---------------|------------|
| 1000 | Petty cash | Balance Sheet | Debit | No | No History |
| 1020 | Bank account, operating | Balance Sheet | Debit | Yes | No History |
| 1021 | Bank account, American Ex... | Balance Sheet | Debit | Yes | No History |
| 1022 | Bank account, VISA | Balance Sheet | Debit | Yes | No History |
| 1023 | Bank account, Mastercard | Balance Sheet | Debit | Yes | No History |
| 1025 | CCB Visa | Balance Sheet | Debit | Yes | No History |
| 1027 | Bank account, corporate | Balance Sheet | Debit | Yes | No History |
| 1030 | Bank account, payroll | Balance Sheet | Debit | No | No History |
| 1040 | Bank account, US dollars | Balance Sheet | Debit | Yes | No History |
| 1045 | SEATAC Visa | Balance Sheet | Debit | Yes | No History |

Accounts Receivable

- AR Customer List

The screenshot shows the 'A/R Customer List' screen in Sage 300. The left sidebar is the same as the previous screen. The main area displays a table for customer ranges with columns for Select (by Customer Number), From, and To. The table shows a range from 1000000000 to 2222222222. Below the table, there are sections for Aging (Age By, Age As Of, Cutoff Date, Include Prepayments) and Credit Limit (No Limit, No Credit Used, Up To, Over Limit).

| Select (by Customer Number) | From | To |
|-----------------------------|------|------------|
| 1000000000 | | 2222222222 |
| (None) | | |
| (None) | | |
| (None) | | |
| (None) | | |
| (None) | | |

Aging
Age By: Document Date, Age As Of: 7/21/2021, Cutoff Date: 7/21/2021, Include Prepayments: ☒

Credit Limit
☐ No Limit
☐ No Credit Used
☐ Up To: 10 % Available
☐ Over Limit

New Web Screens



Reminder List

Sage 300 [SAMLTD]

localhost/Sage300/OnPremise/QURNSU4tU0FNTFRE/Core/Home

sage 300

Session Date: Jul 21, 2021 Administrator SAMLTD

Search Help Settings Tools

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

Business Intelligence Reporting

Scheduling

Reminder List

Schedules

Reminder List

List

Due Personal Schedules

Edit Columns

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

Page 1 of 1

1 - 10 of 10 items

Schedule Process

New Web Screens



Project And Job Costing Transaction Screens

- Opening Balance
- Costs
- Material Usage
- Material Returns

The screenshot shows the 'PJC Opening Balances' screen in Sage 300. The interface includes a left-hand navigation menu with options like 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 has a header with 'PJC Transactions' and sub-headers: Opening Balances, Costs, Material Usage, Material Returns, Material Allocation, and Post Transactions. Below this, there are fields for Document Number (with a search icon), Status (New), Transaction Date (7/21/2021), and Year/Period (2021 - 07). A Description field and a Reference field are also present. At the bottom, there is a table with columns: Line Number, Opening Type, Contract, Project, Actual Type, and Category. The table is currently empty, and the status at the bottom indicates 'No items to display'.

The screenshot shows the 'PJC Costs' screen in Sage 300. The layout is similar to the previous screen, with the same navigation menu and sub-headers. The main content area has fields for Document Number, Status (New), Transaction Date (7/21/2021), and Year/Period (2021 - 07). There is also an 'Optional Fields' checkbox. Below these are Description and Reference fields. At the bottom, there is a table with columns: Line Number, Contract, Project, Category, Cost Class, and Resource. The table is empty, and the status at the bottom indicates 'No items to display'.

The screenshot shows the 'PJC Material Usage' screen in Sage 300. The layout is consistent with the other screens. The main content area has fields for Material Usage Number, Status (New), Transaction Date (7/21/2021), and Year/Period (2021 - 07). There is an 'Optional Fields' checkbox. Below these are Description and Reference fields. At the bottom, there is a table with columns: Line Number, Contract, Project, Category, Item Number, and Item Desc. The table is empty, and the status at the bottom indicates 'No items to display'.

The screenshot shows the 'PJC Material Returns' screen in Sage 300. The layout is consistent with the other screens. The main content area has fields for Material Return Number, Status (New), Transaction Date (7/21/2021), and Year/Period (2021 - 07). There is an 'Optional Fields' checkbox. Below these are Description and Reference fields. At the bottom, there is a table with columns: Line Number, Contract, Project, Category, Item Number, and Item Desc. The table is empty, and the status at the bottom indicates 'No items to display'.

New Web Screens



Project And Job Costing

- Material Allocation
- Post Transactions
- Print Transaction Listing

The screenshot shows the 'PJC Material Allocation' screen in Sage 300. The interface includes a sidebar with navigation options like 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 displays the 'PJC Material Allocation' form with fields for Material Allocation Number (MTAL000000000001), Status (Posted), Transaction Date (6/30/2020), and Year/Period (2020 - 06). Below these fields is a table with columns: Line Number, Contract, Project, Category, Item Number, and Item Description. The table contains one row with the following data: Line Number 1, Contract 120-1200-10, Project 1002, Category PRCHWHTBRD, Item Number A1-460-0, and Item Description White Mels. At the bottom, there is a pagination bar showing 'Page 1 of 1' and '1 - 1 of 1 items'.

The screenshot shows the 'PJC Post Transactions' screen in Sage 300. The interface is similar to the previous screen, with the same sidebar and main content area. The 'PJC Post Transactions' form includes a 'Transaction Type' section with radio buttons for Timecards, Equipment Usage, Charges, Costs, and Revise Estimates. Below this is a 'Post the Following Transactions' section with a radio button for All Transactions and a 'Range' section with 'From' and 'To' fields. The 'Include Documents with the Status' section has checkboxes for Entered, Approved, and Ready for Approval. A 'Post' button is located at the bottom right of the form.

The screenshot shows the 'PJC Transaction Listing Report' screen in Sage 300. The interface includes the same sidebar and main content area. The 'PJC Transaction Listing Report' form has a 'Transaction Type' section with radio buttons for Material Usage, Material Returns, Timecards, Equipment Usage, Charges, Adjustments, Revise Estimates, Costs, and Material Allocation. Below this is a 'Reprint Previously Printed Transactions' checkbox. The 'Include' section has checkboxes for Comments, Tax Details, Optional Fields, and Serials/Lots. The 'Status' section has checkboxes for Entered, Imported, Generated, Approved, and Posted. The 'From' and 'To' fields are set to 1/1/2021 and 7/21/2021 respectively. A 'Print' button is located at the bottom right of the form.

Redesigned Finder



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

Filtering improvements:

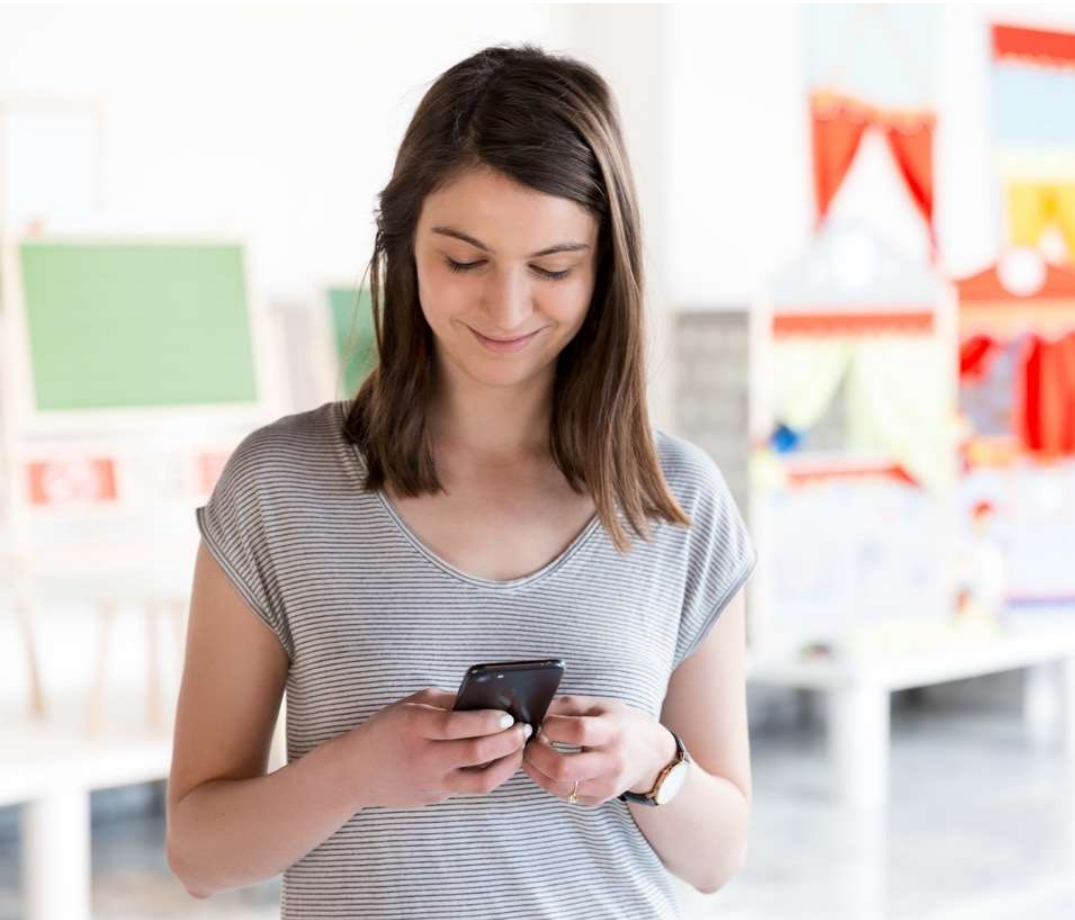
- Persistent filtering to help set default search.
- Additional filtering options, now make highlighting first and last record easier.
- Filtering option is set to 'Show all records' so users can view previous and next records by default.
- Users may also change the size of the finder.

Usability improvements:

- Aligned more with the desktop functionality
- Improved keyboard accessibility

The screenshot shows a window titled "Select Invoice Batches" with a close button. It features a search bar with a dropdown menu set to "Show all records", a "Starts with" dropdown, and a "Search" button. Below the search bar is an "Edit Columns" button. The main area contains a table with the following data:

| Batch Number | Description | Batch Date | Batch Type | Batch Status | Source Applica |
|--------------|-------------|------------|------------|--------------|----------------|
| 67 | | 3/11/2021 | Entered | Open | AR |



Better User Experience

Web Screen Improvements

Desktop Screen Enhancements

Sage Data & Analytics Access

Enhanced 3rd 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.

SAMLTD - G/L Print Financial Statements

File Settings Help

Statement Name: Browse...

Fiscal Option: Year/Period: 2020 - 06

Report Type: ☒ Actual ☐ Provisional

Report As: ☐ Separate ☒ Consolidated

Include: ☐ Report Options ☒ Drill Down Information

Sort By: ☐ Account No. ☒ Segment ☐ Account Group

Account: From: To: ZZZZ

☐ Select Account Groups By Sort Code Range

From Account Group: To Account Group: ZZZZZZZZZZZZ

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

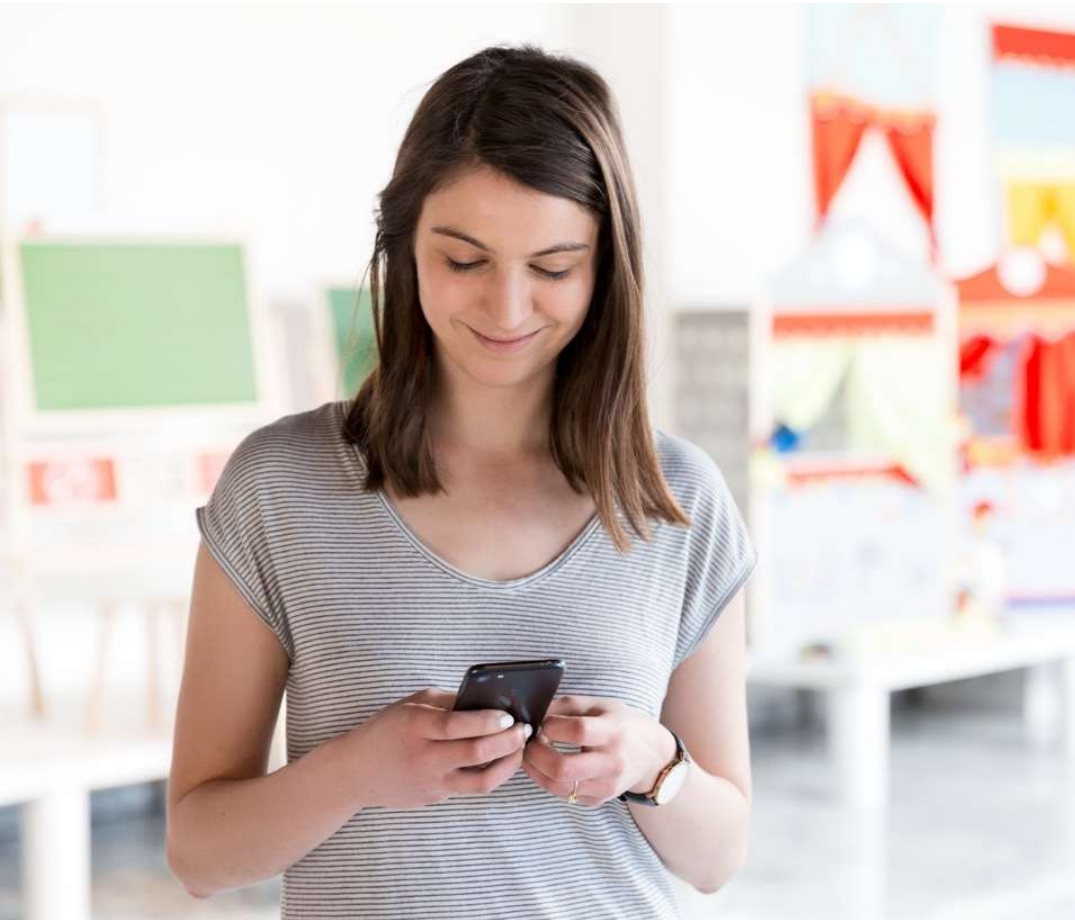
Print Destination: ☒ Printer ☐ Preview ☐ File ☐ E-mail

Print Close

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

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Better User Experience

Web Screen Improvements

Desktop Screen Enhancements

Sage Data & Analytics Access

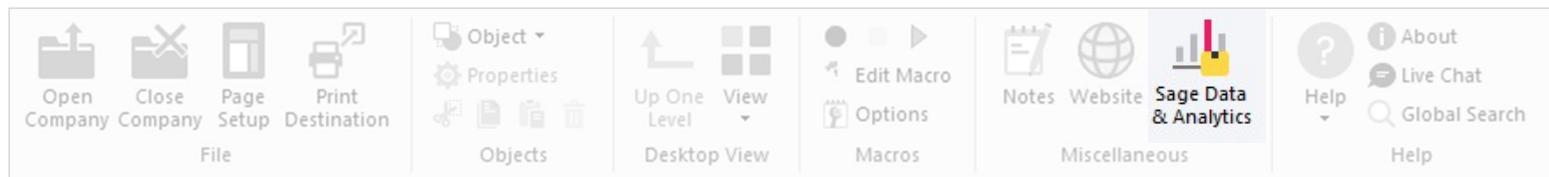
Enhanced 3rd Party Help

Sage Data & Analytics Menu

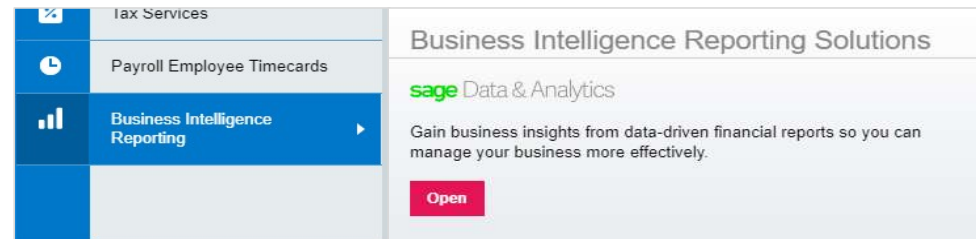


New options to start Sage Data & Analytics from within Sage 300

- Desktop Screens:



- Web Screens:

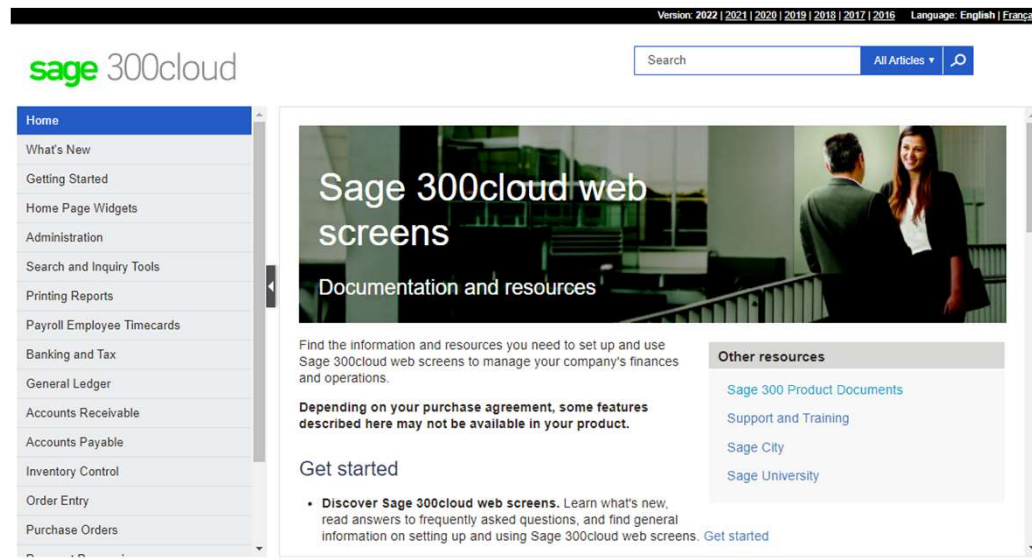


For Sage 300 and Sage 300cloud

Enhanced 3rd Party Help



- 3rd 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 3rd party applications with Sage 300.



For Sage 300 and Sage 300cloud

Advanced Capabilities & Flexibility

Purchase Orders
Order Entry
Reserve LanPak



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: 'SHIP' with a description 'Shipping charges', an amount of -35.00, and an expense account of 6600. The table has columns for Lin..., Additional Cost, Description, Amount, Proration Method, Distribute Proration, and Expense Account.

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

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 'PO Date' is 06/30/2020 and the 'Arrival Date' is 07/30/2020. The 'PO Type' is 'Active'. The 'Ship-To Location' is 1 and the 'Ship-Via' is blank. The 'Bill-To Location' is blank and the 'Terms Code' is 'DUETBL'. The 'Vendor Acct. Set' is 'USA' and the 'Accounts payable, Other' is blank. The 'Description' is blank and the 'Reference' is blank. The 'Order' tab is active, showing a table with two entries: '1' with item 'A1-103/0' (Fluorescent Desk Lamp) and '2' with item 'A1-105/0' (13W Mini Fluorescent Bulb). The table has columns for Lin..., Completed, Item Number, Item Description, Location, Drop-Ship, Quantity Ordered, Unit of Measure, and Unit Cost.

| 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. | 19.889693 |
| 2 | No | A1-105/0 | 13W Mini Fluorescent Bulb | 1 | No | 30 | Ea. | 3.546839 |

For Sage 300 and Sage 300cloud

Order Entry Improvements



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

The screenshot shows the 'SAMLTD - O/E Order Entry' window. It includes fields for Order No., Customer No., No. of Shipments, Last Shipment No., Last Invoice No., and Mr. Ronald Black. The 'Order' tab is selected, showing fields for Template Code, Order Date, Order Type, Ship-To Location, Deliver By, Ship Via, Description, PO No., On Hold, From Multiple Quotes, Job Related, Project Invoicing, Retainage, Status, Entered By, Exp. Ship Date, Tracking No., and Reference. A table of order lines is visible, with columns for Lin., Type, Item No. / Misc. Charge, Kt/BOM, Description, Price List, Location, Deliver By, and Exp. Ship Date. The table contains two lines: Line 1 (Item A1-103/0, Fluorescent Des..., CANADA, 1, 6/30/2020, 7/3/2020) and Line 2 (Item A1-105/0, 13W Mini Fluore..., CANADA, 1, 6/30/2020, 7/3/2020). Below the table, there is a summary section with columns for Qty. on Hand, Qty. on Sales Order, Qty. on Purchase Order, Qty. Committed, and Qty. Available. The summary shows values for Location 1 (Ea.) and All Locations (Ea.). At the bottom, there are buttons for Item/Tax..., Components..., Ship All, Set Ship Date, Set Location, Order Subtotal, and a Close button.

| Lin. | Type | Item No. / Misc. Charge | Kt/BOM | Description | Price List | Location | Deliver By | Exp. Ship Date |
|------|------|-------------------------|--------|--------------------|------------|----------|------------|----------------|
| 1 | Item | A1-103/0 | | Fluorescent Des... | CANADA | 1 | 6/30/2020 | 7/3/2020 |
| 2 | Item | A1-105/0 | | 13W Mini Fluore... | CANADA | 1 | 6/30/2020 | 7/3/2020 |

| | Qty. on Hand | Qty. on Sales Order | Qty. on Purchase Order | Qty. Committed | Qty. Available |
|---------------------|--------------|---------------------|------------------------|----------------|----------------|
| Location 1 (Ea.) | 70 | 15 | 80 | 0 | 70 |
| All Locations (Ea.) | 378 | 23 | 510 | 0 | 378 |

Order Subtotal: 274.90 USD

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.

A screenshot of a software window titled "SAMLTD - Users". The window has a menu bar with "File" and "Help". Below the menu bar is a search bar containing "RMAY" with navigation icons. The main area contains several fields: "User Name" with the value "Renee May", "Account Type" set to "User", "Language" set to "English", "Authentication Method" set to "Sage 300", and "Job Role" set to "CFO/VP of Finance". At the bottom, there is a "Windows Domain" field, a "Browse" button, and a checked checkbox labeled "Reserve a LanPak License".

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

Please, refer to the Reserve LanPak Licenses video.

For Sage 300cloud only

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](#)

Thank you

sage