

Sage 300 ERP

Sage 300 ERP 2012

What's New



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This is a publication of Sage Software, Inc.

Version 2012

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What's New in Sage 300 ERP 2012

Sage 300 ERP 2012 includes new features and improvements that simplify transaction processing and make it easier than ever to look up information and create reports from information in your ERP system, including:

- **Visual Process Flows.** These new, interactive workflow diagrams show the steps required to complete a complex task or process, making it easier than ever to find and access the features you use most often in your ERP system. You can use the standard process flows included with Sage 300 ERP, or create your own custom process flows.
- **Fast, flexible credit card processing.** If you use Payment Processing, you can now capture pre-authorized payments during shipment entry or invoice entry, and you can capture and invoice multiple pre-authorized payments in a single batch.
- **Enhanced order entry.** Improvements to Order Entry help you quickly and easily copy orders, create purchase orders, and view key information about each order at a glance.
- **Simple, powerful reporting features for Inventory Control, Order Entry, and Purchase Orders.** Use new data domains for I/C, O/E, and P/O to look up information and create custom reports in Sage 300 ERP Inquiry.

This article contains a summary of the new features and changes in Sage 300 ERP.

Changes to Sage Product Names

The names of many Sage products changed in 2012. For a list of product name changes, and for general information about how the changes affect the Sage products you use, visit na.sage.com/sage-na/company/brand.

Note: If you are integrating Sage 300 ERP 2012 with a pre-2012 version of a Sage Fixed Assets product, the name you select on the **Product** list on the Fixed Assets Options screen may have changed. For more information, see the "Sage Fixed Assets Integration with Sage 300 ERP" section in the *Sage 300 ERP 2012 Release Notes*.

User Interface Enhancements

Sage 300 ERP 2012 tables now feature alternate row shading (or "color

banding") to help you quickly scan table rows for information.

Sage Advisor Update and Product Enhancement Program

Sage 300 ERP 2012 includes two new features designed to improve your experience as you use and update Sage products:

- **New Sage Advisor Update console.** Sage 300 ERP 2012 includes Sage Advisor Update, a new console that notifies you when updates are available for the Sage products you use. You can use this console to set notification options, review information about available updates, download updates, and monitor the status of your Sage Business Care account.

After you install Sage 300 ERP 2012, a Sage Advisor Update icon appears in your taskbar tray. You can click this icon at any time to view the Sage Advisor Update console.

Note: Installing updates can affect customizations or integrated products. If you have questions about how installing an available update may affect your software, contact your Sage business partner.

- **New Sage Advisor Product Enhancement Program.** Sage 300 ERP 2012 also includes the Sage Advisor Product Enhancement Program (PEP). Designed to help us better meet the needs of our customers, PEP gathers information about how customers use Sage 300 ERP. We use this information to develop new features and improvements.

PEP collects information anonymously, and does not collect any private data from your databases. The information is sent to Sage over a secure connection, and is used for internal purposes only.

To learn more about how information is collected and used, see the Sage Privacy Policy, available at na.sage.com/Sage-NA/privacy-policy.

If you do not want Sage to collect information about your system, you can opt out of PEP from the System Information screen.

Visual Process Flows

Sage 300 ERP 2012 includes a new way of managing work and opening screens: visual process flows.

A visual process flow is an interactive workflow diagram that shows the steps required to complete a complex task or process. You can click each step to access the screen or feature that allows you to perform the step.

Sage 300 ERP includes some standard process flows that are ready to use. You can also create your own custom process flows.

Visual process flows make Sage 300 ERP simpler, easier to use, and more relevant to specific user roles. They can help you:

- Increase productivity.
- Reduce training costs.
- Standardize methods and processes.

Changes and New Features in the Sage 300 ERP Portal

Version 2012 of the Sage 300 ERP Portal includes the following new features and improvements:

- **A new Sage 300 ERP plugin supports browsers other than Internet Explorer.** The portal now supports current versions of Internet Explorer, Firefox, Chrome, and Safari.

If you open the portal using a browser other than Internet Explorer and you do not have Sage 300 ERP installed on your workstation, you must install the Sage 300 ERP plug-in when the browser prompts you to install missing plug-ins.

- **New data sources and query templates.**
 - Use the new O/E Transactions data source and two new query templates to quickly and easily retrieve sales history and invoice information from your company database, and to create and save sales reports that meet your own needs.
 - Use the new P/O Transactions data source and two new query templates to look up purchase orders and purchase order transaction history, and to create and save purchasing reports.
 - Use the new I/C Transactions data source and two new query templates to look up information on inventory items, quantities, costs and transaction history, and to create and save inventory reports.

If you are new to Sage 300 ERP Inquiry, see the topics under "Inquiry" in the Learning Center for more information.

Changes and New Features in System Manager

System Manager 2012 includes the following significant changes:

- **Improved LanPak licensing.** You need only one LanPak to open multiple company databases from the Sage 300 ERP Desktop or from the portal.

Note: You must open the databases from the same workstation using the same Windows user profile.

- **Improved Finder results when using Microsoft SQL with case-sensitive collation.** If you use Microsoft SQL with case-sensitive collation, you can now set up the Finder to show records in search results that do not exactly match the case of text you enter in the Filter field. (In previous versions, records that did not exactly match the case of the text you entered did not appear in results. For example, if you searched for records that contain "client," records that contain "Client" or "CLIENT" did not appear in results.)

To set up the Finder so that search results include all case variations of text you specify:

- a. In the Sage 300 ERP Runtime folder, edit a4w.ini.
- b. Under [A4WSQLS], add "ForceCaseInsensitiveLike=yes".

For more information, see Knowledgebase article 201-1000971.

- **New recommended collation method for Microsoft SQL databases.** The Installation and Administration Guide (in Chapter 3) now recommends using a binary collation method, such as Latin1_general_bin, for Microsoft SQL databases.
- **Changes to product activation, including validation of client ID based on activation code.** Sage 300 ERP now validates client ID based on the activation code provided by Sage. If you need to change your client ID, open the License Manager screen, and on the License Information tab, click the **Change** button.

To enter serial numbers and activation codes for all Sage 300 ERP 2012 programs, use the License Manager screen. If you need to enter license information for pre-2012 programs and OEM products, use the License Information screen.

- **New Assign Visual Process Flows screen.** Sage 300 ERP 2012 allows you to create and use interactive workflow diagrams called visual process flows.

A visual process flow must be assigned to a user before that user can view and use it. You use the **Assign Visual Process Flows** screen to assign process flows to users.

Changes and New Features in Accounts Receivable

Accounts Receivable 2012 includes the following new features and improvements:

- **Changes to Receipt Entry.** You can now see and edit the Deposit Date on the Receipt Entry screen.
- **A new Print O/E Invoice button** that allows you to print O/E invoices directly from the A/R Document Inquiry screen.
- **A new Same As Customer Address option** on the A/R Credit Card Information screen. If you use Payment Processing, you can select this option when adding a new credit card to automatically fill in billing details with name and address information from the customer record.

Changes and New Features in Accounts Payable

Accounts Payable 2012 includes the following significant changes:

- **US tax forms updated.** The 1099 and 1096 forms have been updated to meet the following changed IRS specifications for 2011:
 - The alignment and positioning of some information has been changed so that it prints in the correct place on these forms.
 - For 1099/CPRS code 14 (gross proceeds paid to an attorney), the minimum to report is now \$600.

Changes and New Features in General Ledger

General Ledger 2012 includes the following new features and improvements:

- **Includes Sage 300 ERP Intelligence Reporting.** If you install General Ledger, Sage 300 ERP Intelligence Reporting is automatically installed.
- **New Exclude Inactive Accounts option for the Chart of Accounts report.** You can now exclude inactive accounts from the Chart of Accounts report.
- **New batch reversal feature.** You can now reverse a whole batch or an individual entry in a batch.

Changes and New Features in Inventory Control

Inventory Control 2012 includes the following new features and improvements:

- **A new Include Inactive Items option on the Inventory Worksheet screen and the Inventory Reconciliation screen.** This option allows you to specify whether or not to include inactive items on the reports generated from those screens.
- **An alternate method for generating physical inventory adjustments for standard cost items.**

In earlier versions, Sage 300 ERP used an item's standard cost when computing inventory adjustments for the Generate Inventory Worksheet form. Standard cost is now a default that you can override if you require a different inventory valuation.

To adjust standard cost items using the average (actual) cost, rather than the standard cost, when generating inventory worksheets, you edit the IC.INI file. In the Physical Inventory section of the IC.INI file, change the value of the **UseActualCostForPI** switch to **Yes**. The next time you use the Generate Inventory Worksheet form to adjust inventory, the adjustments will be based on average cost.

- **New security authorizations.**

A new portal-related **Sage 300 ERP Inquiry** security authorization allows you to query Inventory Control data in the Sage 300 ERP Portal. If you also have Export Processing authorization for Inventory Control, you can print or export the results of these queries.

- **A new Inventory Control data source for Sage 300 ERP Inquiry.**

You can now use Sage 300 ERP Inquiry (in the portal) to look up information on Inventory Control items and to create ad hoc item reports.

Changes and New Features in Order Entry

Order Entry 2012 includes the following new features and improvements:

- **New security authorizations.** Order Entry 2012 includes a new portal-related **Sage 300 ERP Inquiry** security authorization. This authorization allows you to query Order Entry data in the Sage 300 ERP Portal. If you also have Export Processing authorization for Order Entry, you can print or export the results of these queries.

- **A new Order Entry data source for Inquiry.** You can now use Inquiry (in the portal) to look up information on Order Entry transactions, including:
 - Sales by customer, range of dates, or territory.
 - Cycle time for customer orders.
 - Average sales in a specific date range.
 - Order Entry invoices posted to Accounts Receivable within a specific date range.
- **A new Capture Payments With Invoices screen.** If you use Payment Processing, this new screen appears in O/E Transactions. You can use it to capture and invoice pre-authorized credit card payments for multiple Order Entry documents in a single batch.
- **A new Copy Current Order option** on the File menu on the Order Entry screen. This option allows you to copy an order directly from the Order Entry screen.
- **A new field beside the On Hold option** that allows you to enter a note about why you are placing an order on hold.
- **A new Entered By field** on transaction entry screens (Order Entry, Shipment Entry, Invoice Entry, and Credit/Debit Note Entry), which indicates who entered the transaction.
- **A new Deliver By field** that allows you to enter a date on an order to indicate when your customer would like the order delivered.
- **A new Create PO button** on the Order Entry screen that allows you to create a purchase order based on an order on Order Entry.
- **Improved help.** We've revised Order Entry help to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions.
- **Shipment tracking fields on the Order Entry screen are in a more convenient location.** The **Ship Via** and **Tracking No.** fields now appear on the Order tab (instead of the Customer tab).

Changes and New Features in Purchase Orders

Purchase Orders 2012 includes the following new features and improvements:

- **New security authorizations.** A new portal-related **Sage 300 ERP Inquiry** security authorization allows you to query Purchase Orders data in the Sage 300 ERP Portal. If you also have Export Processing authorization for Purchase Orders, you can print or export the results of these queries.
- **A new Purchase Orders data source for Sage 300 ERP Inquiry.** You can now use Sage 300 ERP Inquiry (in the portal) to look up information on Purchase Orders transactions.
- **Improved help.** We've revised Purchase Orders help to improve search results, enhance the readability of help topics, and make it easier for you to find important information and instructions.

Changes and New Features in Payment Processing

Payment Processing 2012 includes the following new features and improvements:

- **Capture and invoice multiple pre-authorized payments in a single batch.** In Order Entry, a new Capture Payments With Invoices screen lets you capture and invoice pre-authorized credit card payments for multiple Order Entry documents in a single batch.

After processing, you can review a summary of payments processed, and you can print invoices and receipts. A new receipt batch is created automatically in Accounts Receivable for each processing code used to process payments.

- **New options to customize and streamline payment processing.** In Payment Processing, a new PMT Options screen includes the following options:

- **Require Capture of Pre-authorized Payments at Shipment.** In previous versions of Payment Processing, users were required to capture pre-authorized payments before shipping an order. You can select this option to preserve the existing workflow, or you can clear the option if you want to allow warehouse staff to ship orders without capturing payments. If you clear the option, accounting staff can capture pre-authorized payments when invoicing the order.
- **Warn Before Forcing Expired Pre-authorizations.** In previous versions of Payment Processing, a warning message appeared each time a user attempted to "force" payment for an expired pre-authorization. You can use this option to turn this warning off if you want to streamline the process of forcing payment for expired pre-authorizations.

- **A new Same As Customer Address option** on the PMT Process Credit Card screen. If you are entering a card for one-time use, you can select this option to automatically fill in billing details with name and address information from the customer record.

Changes and New Features in Return Material Authorization

Return Material Authorization 2012 includes the following new features and improvements:

- **Credit Note Return Type.** You can now create Credit Note details for all three return types supported by Order Entry:
 - Items Returned to Inventory
 - Damaged Items
 - Price Adjustment
- **Print Credit Notes.** You can now print a Credit Note from a RMA detail line by clicking **Print Credit Note** on the detail Zoom/Integration tab.
- **Print Order Confirmations.** You can now print an Order Confirmation from a RMA detail line by clicking **Print Order Confirmation** on the detail Zoom/Integration tab.
- **Print Vendor Returns.** You can now print a Vendor Return from a RMA detail line by clicking **Print Vendor Return** on the detail Zoom/Integration tab.
- **RMA serial quantity allocation validation.** Allocated serial quantity validation will not take place when the item on the RMA detail is serialized, *and* comes from an O/E invoice where no serials have been allocated to the item.

In the above circumstance, RMA will not validate the quantity of serials allocated because the originating O/E invoice detail record did not have allocated serial numbers, even if the item is presently marked as serialized.

- **RMA Detail Comments and Instructions viewable when detail is flagged Complete.** Previously, comments and instructions were not viewable from the RMA detail grid once the RMA transaction detail was flagged as Complete. However, it was possible to view the comments/instructions through the F9 zoom screen. This issue has been fixed. It is now possible to call up the comments/instruction popup form from the RMA detail grid for a detail that has been marked as complete.

- **RMA Header Customer Claim Number duplicate check.** The new template option **Check Customer Claim No.** will ignore, warn, or report an error when an RMA document is entered for a customer and the customer claim number is no longer unique to that customer.
- **RMA Header Restocking Fee Percentage.** There is a new field on the Customer tab of the RMA Entry screen: **Restocking Fee Percentage.** The field is automatically populated with default values from the chosen template if automatic restocking has been enabled on the template. RMA document restocking fee calculation will use the percentage found on the RMA Entry customer tab, not the percentage found on the template. The template value is only used as a default populating value.
- **RMA Header Comments and O/E Credit Note Header Comments.** RMA Header comments will be copied across to an O/E Credit Note header if all of the following conditions apply:
 - The O/E credit note is matched to an O/E invoice.
 - The RMA document is using an RMA template.
 - The template option **Copy RMA Comments to Matched CR Note** is turned on.

When dealing with unmatched O/E Credit Notes, RMA Header comments will be copied across to the Credit Note of all of the following conditions apply:

- The O/E credit note is unmatched (not tied to an O/E invoice).
 - The RMA document is using an RMA template.
 - The template option **Copy RMA Comments to Unmatched CR Note** is turned on.
- **RMA Header Optional Field error when selecting an optional field.** Fixed an issue with RMA header optional fields that prevented a user from choosing an optional field for the header. This issue was addressed as a hotfix for RMA 6.0A, and is included in the RMA 6.1A release.
 - **Pricelist code validation on completed RMA documents.** When an RMA document is flagged "Completed" in the header, RMA Integrity Check will not validate the pricelist code if it is blank. This measure was introduced to handle RMA documents entered in older versions of RMA where blank Pricelist validation was not performed.
 - **Defaulting item cost to Most Recent Cost when assigned costing method cost is zero.** When an item's costing method cost (Avg, Std, etc)

is zero, RMA will default to the Most Recent Cost for the item, at the selected location.

- **RMA Detail Quantity Credited Check and legacy records from prior versions of RMA.** RMA documents that make use of a template have the option to have their detail lines checked for quantities already credited.

For records upgraded from RMA version 5.3 and prior where required data linking RMA details to O/E invoices was not maintained, a user may be unable to update RMA detail records. To fix this problem the Quantity Credited Check is not performed when inadequate information exists on the RMA detail to be able to link the RMA line to an existing O/E invoice detail.

Changes and New Features in Sage 300 ERP Intelligence Reporting

Sage 300 ERP Intelligence Reporting 2012 includes the following new features and improvements:

- **Automatically installed with General Ledger.** If you install General Ledger, Sage 300 ERP Intelligence Reporting is automatically installed.
- **New Report Designer.** The new Report Designer lets you "drag and drop" columns and predefined calculations to easily create new financial reports.
 - A new Formula Builder enables you to create additional calculated fields.
 - A new "What If Analyzer" includes a sliding scale you can use to dynamically change amounts while forecasting, budgeting, and creating projections.
- **New Reporting Trees.** Reporting trees enable you to model sophisticated reporting structures so you can view your organization in many different ways with the click of a button.
- **New report distribution feature.** You can use the new report distribution feature to quickly and easily send reports to a file, FTP site, or e-mail message in a number of standard formats.
- **New reporting options.** You can now exclude inactive accounts from the GL Chart of Accounts Reports, filter by range of fiscal years on the G/L Transactions Listing Report, and exclude inactive I/C items from I/C Physical Inventory reports.
- **New Report Designer progress bar.** A progress bar now appears when you are generating layouts, enabling you to view progress or cancel report layout generation.

- **Improved "Refresh Data" in Report Designer.** When refreshing data, all new accounts are placed into the correct account groupings in the correct order, using the same formatting as the rest of the report.
- **Simplified Drill Down.** In financial reports, you can now right-click a value and select **Drill Down**.
- **Option to remember sign-in credentials.** When signing in to Sage 300 ERP Intelligence Reporting, you can now save your User and Database credentials.
- **Improved performance and efficiency of Universal Query Engine.** The Universal Query Engine now uses a newer version of SQL Compact Edition, with improved parsing of SQL queries and faster data cache creation.
- **Improved performance of Financial Reports report.**
- **New aggregated reports.** Two new reports — Aggregated Financial Reports and Aggregated Financial Reports Designer — allow you to run financial reports without negatively impacting performance.
- **Enhanced usability of the BI Tools ribbon.** You can now point to a button on the ribbon to view a "tool tip" with information about the button.

Changes and New Features in Sage CRM Integration

Sage 300 ERP 2012 Integration with Sage CRM 7.1 SP2 includes the following new features and improvements:

- **Changes to program installation.** Note the following important changes to the process of installing and integrating Sage 300 ERP and Sage CRM:
 - Sage 300 ERP Integration for Sage CRM (the Sage CRM-side integration component) is not part of the Sage CRM install, and must be installed separately.
 - Sage 300 ERP Integration Component (the Sage 300 ERP-side integration component) is now part of the all-in-one Sage 300 ERP install, so you do not need to install it separately if you select **Sage CRM Integration** when installing Sage 300 ERP.

For details and updated installation instructions, see the *Sage CRM Integration Upgrade Guide* and *Sage CRM Integration Guide*.

- **Support for multiple browsers.** You can now use Mozilla Firefox, Apple Safari, and Google Chrome to view and use integrated screens that appear in a browser window, including the Quotes and Orders screens. However, note the following exceptions:
 - If Sage CRM and Sage 300 ERP are installed on separate servers, the integrated Quotes and Orders screens are supported only in Internet Explorer.
 - Integrated screens that appear in a separate window, such as A/R Invoice Entry, are supported only in Internet Explorer.
- **A new Sales Split panel on the integrated Quote Entry and Order Entry screens.** If you track commissions for sales staff, you can use this panel to allocate transaction totals to up to five salespersons.

For an overview of new features in Sage CRM 7.1 SP2, see the *Sage CRM v7.1 SP2 What's New Guide* on the Sage CRM Community website:

https://community.sagecrm.com/user_community/m/sage_crm_v71/19886.aspx

For a complete list of customer-facing changes and upgrade information for Sage CRM integrated with Sage 300 ERP, see the *Sage CRM Integration Upgrade Guide*.

For system requirements and instructions on setting up Sage CRM integration with Sage 300 ERP, see the *Sage CRM Integration Guide*.

