

# Sage 300 2024 Release Notes

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Thank you for choosing a Sage business management solution.

These release notes contain important information about Sage 300, including information about product changes that are not in the documentation.

## In this document:

Product updates contain modified versions of one or more Sage 300 program components. A product update is not a full upgrade or a product replacement. Each product update is valid only until we release the next product update or the next version of Sage 300.

Depending on your purchase agreement, some features described here may not be available in your product.

For more information about feature availability, see Sage Knowledgebase article [105946](#).

## What's new in Product Update 1

This section contains a summary of new features and changes in Product Update 1.

### General improvements

This release includes the following new features and improvements in both Sage 300cloud web screens and Sage 300 classic screens:

#### Accounts Payable

- Five new fields have been added for 1099 purposes: First Name, Last Name, FATCA, Second TIN Notice, and Tax Withholding State. These fields also appear in Inquiry Reporting.
- Sage 300 now supports Form 1099-Div in the AP 1099 Filing screen.

#### Sage Support Resource Centre

You can now access the Sage Support Resource from Sage 300 menus.

#### Sage 300cloud web screens improvements

This release includes the following new web screen for Project and Job Costing:

- **PJC Budget Maintenance.** Use the PJC Budget Maintenance screen to forecast revenues and costs over several fiscal periods, so that you can budget your contracts effectively.

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## What's new in Sage 300 2024

This section contains a summary of new features and changes in the 2024 release.

### General improvements

This release includes the following new features and improvements in both Sage 300cloud web screens and Sage 300 classic screens:

#### Sage 300cloud web screens improvements

This release includes the option to install Sage 300cloud web screens: modernized versions of Sage 300 screens that you can use in a web browser.

Web screens run in parallel with 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.

Here's a quick overview of what's new in Sage 300cloud web screens:

- **New Project and Job Costing web screens.** This release includes the following new web screens for Project and Job Costing:
  - **Equipment Usage.** Use the PJC Equipment Usage screen to record the use of equipment that you own.
  - **Adjustments.** Use the PJC Adjustments screen to adjust or transfer timecard, equipment usage, material usage, material return, cost, or charge transactions that you have posted in Project and Job Costing.
  - **Timecards.** Use the PJC Timecards screen to enter timecards for employees, which is how you charge job-related labor costs to projects.
  - **Transaction History.** Use the PJC Transaction History screen to view details for transactions posted in Project and Job Costing and job-related transactions posted in other Sage 300 programs.
  - **Transaction History Report.** The report provides a printed listing of transactions that appear on the Transaction History screen, with the advantage that you can print the report for a selected range of contracts, projects, categories, cost classes, customers, contract status, and project status.
- **Enter job-related documents in Purchase Order.** You can now enter and work with job-related documents on all P/O web screens:
  - **Transactions**
    - Requisition Entry
    - Purchase Order Entry
    - Receipt Entry
    - Invoice Entry
    - Return Entry
    - Credit/Debit Note Entry
    - Copy Purchase Orders
  - **PO Analytical Reports**
    - Transaction List - added Job Related checkbox
    - Purchase Order Action Report - added Job Related checkbox
    - Purchase History Report - added Job Related checkbox
    - Posting Journals – added Job Related checkbox
  - **PO Statistics and Inquiries**
    - PO Purchase History – added job columns in the Purchase History Detail
    - PO Pending Receipts Inquiry – added job columns in the PO Pending Receipts Details screen
  - **PO Create Purchase Orders** - Create Pos from Requisitions – added Job Related checkbox
  - **Setup** – Optional Fields – added Job Related settings

## Financial Report for the Web

Sage 300 Financial Reporter for the Web is a web-based tool used to manipulate, format, graph and print general ledger (GL) data. Financial Reporter for the Web utilizes Microsoft Excel to create financial statements and statement specifications that display data from Sage 300 General Ledger.

**Note:** Sage Intelligence Report Cloud (SIRC) has been deprecated with the introduction of Financial Reporter for the Web.

## Compliance – IRAS ASR Tier 2 (Singapore Tax Report Direct Submission)

Available on Sage 300 web screen only, this feature is an enhancement from existing Tax Singapore (TS) module. It is specifically designed to report GST Taxes for form 5 and form 8 (F5 and F8) digitally via IRAS (Government) server website.

## Direct API Bank Feeds

Access to Direct API bank feeds as added by Sage Service Fabric. Example. Bank of America CashPro bank feed.

## Additional Web APIs

The additional web APIs include CP employee, UP employee and IC Item location details.

## Global Search

The Global Search feature is available in the 2024.0 release. This feature was not available in product updates 2023.2 or 2023.3.

**Important!** You must sign into Database Setup on each Sage 300 server machine using Global Search.

## Technical information

This section provides information about program fixes, product contents and requirements, recommendations, and other technical information.

### Sage 300 2024.1 program fixes

The following sections describe program fixes included in Product Update 1.

#### System Manager

Fixed a problem in the System Manager related to slow performance when importing users, importing user authorization, and modifying user authorization. (Reference #8009775742)

#### Order Entry

Fixed a problem which triggered an access violation message when drilling down in Order Entry (desktop only). (Reference #8009704029, #8009521030, #8009536393, #8009558542, #8009545018, #8009621111, #8009765699)

#### Sage CRM

Fixed a problem where the statistics year or period for promoted customers was read-only. (Reference #8009723584)

### Sage 300 2024 program fixes

Sage 300 2024 includes program fixes for some problems that exist in the most recent previous version (Sage 300 2023 Product Update 3). The following sections describe these program fixes.

#### Web API

Fixed an issue where the Web API endpoint for IC Item Location Details was not available. (Reference # SM01\_2648820230508)

#### System Manager

Fixed a problem that prevents import in web screens when the IIS server is configured with a proxy site. (Reference # 8009627198)

#### Bank Services

Fixed a problem on the withdrawal amount when reversing an entry (Reference # 8009658363)

#### Accounts Payable

Fixed a problem in which the number of decimals in VB screen (desktop) and number of decimals in web screens were not consistent in GL entry. (Reference # 8009480228)

Fixed a problem that prevented saving a GL Financial Report. (Reference # 8007288528)

## Order Entry

Fixed a problem on UK Tax (TK70) VAT Return Entry Form where the Source Currency is used instead of Home Currency (Reference # 8009653339) (Reference # 8009653663)

## General information

- Sage 300 2024 supports upgrades *only* from version 5.6 or later.
- If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in BX66A\WSSetup) on every workstation where you will view and use Intelligence Reporting screens.
- Sage 300 2024 supports upgrades *only* from version 5.6 or later.
- If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in BX66A\WSSetup) on every workstation where you will view and use Intelligence Reporting screens.
- You require version 2024 (internally versioned as 7.1A) of all core programs that you plan to use.

If you use Canadian Payroll or US Payroll, you require version 7.3 of these programs with the most current tax updates.

**Note:** The tax tables for version 7.3 will be available until March 2024. After this date tax tables and support will only be available for Payroll version 8.0.

**Important!** You must install Sage 300 before installing payroll programs.

- If you are upgrading from an earlier version, you must upgrade all Sage 300 programs to 2024 at the same time. Sage 300 2024 programs do not work with programs from earlier versions.
- If you have a subscription license, you don't need to enter serial numbers and activation keys for individual Sage 300 applications. When the License Manager appears during installation, the only license information you need to enter is your Client ID, Company Name, and Serial Number. After you've entered this information, ensure that you have internet access, and then click Refresh to verify your subscription.
- If you do not have the following programs, which are required to use Sage 300, they are installed with Sage 300:
  - MSXML (Microsoft XML Core Services) 6.0
  - Microsoft SQL Server Native Client 12.0
  - Microsoft .NET Framework 4.8.2
- Sage 300 2024 includes SP34 for SAP Crystal Reports® runtime engine. If you use Sage HRMS or Sage Fixed Assets integrated with Sage 300, refer to the Sage 300 2024 Compatibility Guide for updated information on compatibility with Sage HRMS and Sage Fixed Assets. The Sage 300 2024 Compatibility Guide is available from Sage Knowledgebase article [26777](#).
- For the most current technical information about database changes, please refer to the Sage 300 2024 SDK Application Object Model (AOM).
- Product documentation for Sage 300 is available from the [Sage 300 Product Documents](#) website.

## Compatibility with other programs

For a complete list of compatible programs, database platforms, and operating systems, see the *Sage 300 2024 Compatibility Guide*, available from Sage Knowledgebase article [26777](#).

## Known issues

- When using the Notes screen on the Sage 300 classic desktop:
  - When adding or editing a note, the text editing area and toolbar appear only if you have enabled active scripting and scripting of Java applets in Internet Explorer security settings. For more information, see Sage Knowledgebase article [76898](#).
  - The Notes screen does not appear correctly if you use the Medium - 125% display size (specified in Windows control panel). For more information, see Sage Knowledgebase article [76926](#).

- When previewing reports in web screens, information in some reports is not aligned correctly. To work around this issue, export the report to PDF format. For more information, see Sage Knowledgebase article [76337](#).
- In some fields, Chinese language characters cannot be entered.
- Printing issue with Sage Fixed Assets Integration (FAS). Report printing in both FAS and Sage 300 will not work after the installation of FAS Integration. To work around this issue, you need to restore a Crystal runtime dll. For more information, see Sage Knowledgebase article [230907204735260](#).

## Installing Sage 300

For detailed instructions on installing Sage 300, see the [Sage 300 Installation and Administration Guide](#).

## Installing product updates

After installing a product update:

- If you use Sage 300cloud web screens, you must use Database Setup to configure the Portal database again.
- If you use Sage CRM integrated with Sage 300, you must upgrade your CRM integration as follows:
  - Install the Sage CRM integration for Sage 300, which is available on Sage Knowledgebase article [45434](#).
  - Uninstall and then reinstall the Sage CRM Synchronization Component. (Use the Sage CRM Workstation Setup screen in Sage 300 to install the Sage CRM Synchronization Component.)
- If you use Sage Intelligence Reporting Cloud, you must customize some Sage 300 program files, and then you must reset IIS. For more information, see Sage Knowledgebase article [84722](#).
- You should clear your browser's cache. (Some fixes included in the update may not take effect until you do.)
- On any workstations you use, you must reinstall workstation setup as the Windows administrator user if:
  - The product update includes changes to workstation setup.
  - An earlier product update includes changes to workstation setup, and you have not previously installed that product update or any other subsequent product update.

**Example:** Suppose that the current Product Update is 4. Product Update 2 includes changes to workstation setup, and the other product updates do not. You have been using Product Update 1. You did not install Product Update 2, or 3. You have now installed Product Update 4. To update your workstations with the changes to workstation setup that were included in Product Update 2, you must reinstall workstation setup.

- The following product updates include changes to workstation setup:
  - Product Update 4

## Removing Sage 300

Before removing Sage 300, you must:

- Close all instances of the Sage 300 Desktop.
- Close all applications that integrate with Sage 300.
- Stop all Sage 300 services that are running, such as Sage 300 .CNA.Windows Service.

### To remove Sage 300 2024 programs:

- In Windows' Control Panel, click Programs And Features.
- Open Uninstall Or Change A Program, and then:
  - To remove all Sage 300 programs, double-click Sage 300 2024.
  - To remove individual Sage 300 programs:
    - Click Sage 300 2024, and then click Change. (Do not double-click Sage 300 2024.)
    - Click Modify, and then use the Select Features screen to select the programs you want to install and clear the selections for programs you want to remove.

## Sage 300 Payroll

Sage 300 2024 includes Canadian and US Payroll. For more information, see the related release notes, which you can find on the [Sage 300 Product Documents](#) website.

**Note:** Canadian and US Payroll may not be available in all regions.

## Sage 300 Intelligence Reporting

Sage 300 2024 includes Sage 300 Intelligence Reporting. For more information and help with getting started, see [Sage Intelligence Learning](#).

### Known issues

- If you have multiple versions of Microsoft Excel installed, you may need to manually load the Report Designer Task Pane Excel Add-in.
- If you use exclusions in account and row set rules, exclusion accounts may appear when you drill down to balance.
- If Sage 300 Intelligence Reporting was installed by a user other than you (for example, an administrator), you must open Microsoft Excel before running reports in Report Viewer or Report Manager.
- In Report Viewer, an "Open File - Security Warning" message appears for every report you view. (This message should only appear once, when you first open Report Viewer.)
- If you use Microsoft Excel 2013, and you save a report template in Report Manager using Save Excel Template:
  - When you run the report in Excel, an "External Data" message may appear. You can proceed by clicking Yes.
  - If the report template has a timeline, the timeline does not retain its filters.

## Sage 300 Software Development Kit

This section lists improvements and fixes for the Sage 300 Software Development Kit (for desktop screens) and the Sage 300 Web Software Development Kit (for web screens).

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