



Sage 300 Construction and Real Estate

(formerly Sage Timberline Office)

Version 17.1

Release Notes

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Version 17.1 Rev 8

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Release Overview

About this document

This document contains information about the current release of Sage 300 Construction and Real Estate. Each Sage 300 Construction and Real Estate application is described in a separate section, which includes information about new features and enhancements for the release, resolved issues, and known issues.

In addition to reading this document, read the supporting documentation before you install. See [“Supporting documentation”](#) (the next section).

About this release

The 17.1 release of Sage 300 Construction and Real Estate includes enhancements and software fixes. Highlights of this release are listed in the following table.

Application/area	Features and enhancements
General	“Upgrades to the latest components” on page 5 “Licensing changes” on page 5 “Crystal Reports using the SQL database” on page 6
SQL Replicator	New tool; see page 16
Mobile Projects	New application; see page 11
Mobile Reports	New application; see page 11 (in 17.1 Rev 6)
License Administration	New tool; see page 10 .
System Administrator	New tool; see page 18 .
Accounts Payable	“Electronic 1099 forms” on page 7 (in 17.1 Rev 6)
Payroll (United States)	“Payroll report and ACA compliance fixes” on page 15 (in 17.1 Rev 6) “ACA information carryover” on page 14 (in 17.1 Rev 8)

You can also view the [Release Highlights video](#) to learn more about the new features and enhancements. View the [2017 Year-end software release video](#) to learn about enhancements for year-end processing.

Important! When you install this version of the software, Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. Before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the [Sage Customer Portal](#); see [Knowledgebase article 87017](#) for more information. You will also need to know your **Registration Name** and 10-digit **Sage Client ID**.

Support and Assistance

Supporting documentation

In addition to reading this document, read the following supporting documentation before you install:


- The [Important](#) document contains critical and late-breaking topics.
- The [Installation Checklist](#) contains a brief description of the steps involved in upgrading your software.
- The [User's Guide](#) contains installation steps for Sage 300 Construction and Real Estate and Sage Estimating.
- The [Sage SQL Replicator and Sage Construction Central Setup Guide](#) contains information for setting up Sage SQL Replicator.

You can access a [complete library of supported product documents](#).

Online help

Each Sage 300 Construction and Real Estate application includes online help, which provides information about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [Help] button, click  (the help icon button), or press **F1** to display the help topic for that window.
- In an application, select **Help > Help Topics**.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding information, the online help for each application includes the following tabs:

- **Contents** tab with an outline of the help with links to the help topics.
- **Index** tab with keywords that link to help topics related to that keyword.
- **Search** tab, where you can type text and click [Search] to locate that text in the help topics.

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**.
- From Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit <http://www.sagesoftwareuniversity.com/>.

Contact your business partner for local training.

Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.

Installation

Before you install this version, review the **Install Sage 300 Construction and Real Estate** chapter in the [User's Guide](#), which provides step-by-step instructions.

Beginning with 17.1 Rev 5, you no longer enter activation codes when you install. Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. Before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the [Sage Customer Portal](#); see [Knowledgebase article 87017](#) for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com). You can use the new License Administrator tool to manage these licenses.

The installer detects old operating systems (including Windows XP, Windows Vista, Windows Server 2003, and Windows Server 2008 R1) and will prevent the installation of Sage 300 Construction and Real Estate. For a complete list of supported operating systems, see the [System Requirements article in the Sage Knowledgebase](#).

Important! If you want to run the new SQL Replicator tool (described on [page 16](#)), use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. If the size of your data (including Service Management, Purchasing, and Inventory) is under 6 GB, you can use SQL Express. For information about installing and using SQL Replicator, see the [Sage SQL Replicator and Sage Construction Central Setup Guide](#).

Tip: If you are planning to run Sage 300 Construction and Real Estate on new hardware, use the Server Migration tool. See chapter 3 of the **User's Guide** for instructions.

Installation paths

If you are on version 15.1 or 16.1, you can upgrade directly to version 17.1.

If you are on version 13.1 or 14.1, we recommend that you first upgrade to version 15.1 and upgrade your data (including Inventory, Purchasing, and Service Management data) before upgrading to version 17.1.

If you are on a version that is earlier than 13.1, we recommend that you contact your Business Partner for assistance.

Important! If you also use Document Management or Sage Estimating, you must upgrade both products to the same version. For more information, see the **Upgrade paths** section in **Chapter 1** of the [User's Guide](#).

Installation notes

Important! If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We **do not** support rolling Sage 300 Construction and Real Estate back to a previous version and **do not** recommend it.

- **Estimating** - If you use Sage Estimating, you must install Sage Estimating 17.1 *after* installing Sage 300 Construction and Real Estate Accounting 17.1.

Known issues

Estimating using the sample address book

If you used the sample address book that comes with Sage 300 Construction and Real Estate and added your contacts to it, you may have a problem opening the address book after upgrading to version 17.1. See Knowledgebase article 85407 for more information.

Service Management upgrade

If you use Sage Service Operations and Service Management, you may see a pop up message for each table where duplicate records are found during the upgrade. Just click **[OK]** to continue.

Database changes

As with any release, database changes in Sage 300 Construction and Real Estate applications may affect your custom report designs or custom third-party applications. Contact your authorized business partner to discuss any issues relating to custom reports or third-party applications.

To view fields contained in new records:

- In Report Designer, view the Available Fields report (by selecting **Tools > Available Fields**).
- In Crystal Reports Designer, open an existing report, specify the data source location, add new or modified records, and view the fields through Field Explorer. For more information about this procedure, refer to the **Crystal Reports** chapter of the *User's Guide*.

For version 17.1, some schema changes were made in Service Management.

Note: Version 17.1 includes the new Sage SQL Replicator tool, which takes the Sage 300 Construction and Real Estate data stored in the Actian Pervasive database and replicates it into a SQL database. For more information, see ["SQL Replicator" on page 16](#).

General Topics

New features and enhancements

Upgrades to the latest components

This release includes the following upgrades:

- Actian PSQL v12 SP1 Update 8.
- .NET 4.6.2 and .NET 3.5.
- Crystal Runtime Engine 13.0.19.
- Amyuni PDF Driver 5.5
- Sage Exchange Desktop 2.0 (for use with Sage Payment Solutions)

Licensing changes

Beginning with 17.1 Rev 5, you no longer enter activation codes when you install. Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. Before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the [Sage Customer Portal](#); see [Knowledgebase article 87017](#) for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com). You can use the new License Administrator tool to manage these licenses.

Crystal Reports using the SQL database

If you use the new SQL Replicator tool (as described on [page 16](#)), your company data (stored in a Pervasive database) is replicated into a SQL database. To use this SQL database for your Crystal Reports that are accessed from menus or Desktop, select the **Use SQL** check box. For more information, view the [Using SQL data for reporting video](#).

The **Use SQL** check box does not work with reports written with SQL commands. At this time, the subcontractor compliance reports provided with Accounts Payable and Project Management will continue to use the Pervasive database.

Note: Because Crystal Reports run with and without the **Use SQL** check box use different logic to generate the results and enforce security differently, you may notice some differences in the sort order, number of lines, and number of pages. Although the totals will be the same, we recommend that you verify your reports when you switch to using the SQL database.

If you design Crystal Reports and want to use the SQL database as the data source, see the Crystal Reports chapter of the [User's Guide](#) and view the [Design Reports to Access SQL Data video](#).

Important! If you use a macro to run a Crystal Report in Sage 300 Construction and Real Estate (even if it uses the Pervasive database), you will need to set up the macro again to run the report in version 17.1

SQL server on another server

You can run SQL server on a server other than the Accounting server containing your Sage 300 Construction and Real Estate data. If you do, you must perform these extra steps to link the two servers correctly:

- 1 On your Accounting server, browse to the Shared directory where you installed Sage 300 Construction and Real Estate and launch **RemoteSQLServiceAccountConfigurationTool.exe**.
- 2 In the **Remote SQL Service Account Configuration Tool** window, enter the SQL instance name, enter the domain\username and password for **Service Account Credentials**, and click [OK].

Resolved issues in 17.1 Rev 7

The resolution of the company logo image used in Crystal Reports was improved.

Resolved issues in 17.1 Rev 6

If you change the **Posting Setting** to **Automatic** in the **Post and Interface Settings** window (for any application), that setting is now retained when you close the window.

Accounts Payable

Enhancements in 17.1 Rev 6

Electronic 1099 forms

You can now designate which vendors in Accounts Payable will receive electronic 1099 forms (instead of printed forms). On the **1099 Settings** tab of the **Vendor Setup** window, select the **Electronic 1099** check box and enter the email address where the vendor will receive notification of the electronic 1099 form.

Resolved issues in 17.1 Rev 7

- After you record a few credit card payments, you no longer get a message about another user locking the data file.
- You can now void a credit card payment without getting a message about another user locking the data file.

Resolved issues in 17.1

Message about a closed GL period

Previously, if **Allow entry to closed period** was not selected in the **GL Settings - Processing Options** window but you changed an invoice distribution that has a closed accounting period, the entry may be posted to the closed period. Now, you see an error message that the accounting period is closed and the entry is not posted.

Accounts Receivable

There were no major updates to Accounts Receivable for this release.

Address Book

There were no major updates to Address Book for this release.

Billing

There were no major updates to Billing for this release.

Cash Management

There were no major updates to Cash Management for this release.

Resolved issues in 17.1 Rev 7

You can now import cleared checks without some being skipped with a message about a bookmarked position.

Contracts

There were no major updates to Contracts for this release.

Desktop

There were no major updates to Desktop for this release.

About TS-Main

Because you can quickly access applications from Sage Desktop, you no longer need to access them through TS-Main. You can even launch a particular application task from Desktop. All existing shortcuts for TS-Main now launch Desktop; TS-Main has been removed from the Windows Start menu and from the applications list in Desktop.

Resolved issues in 17.1 Rev 7

When many people are using an application, it no longer takes a lot of time to open that application from Desktop.

Equipment Cost

There were no major updates to Equipment Cost for this release.

Financial Statements

There were no major updates to Financial Statements for this release.

General Ledger

There were no major updates to General Ledger for this release.

Information Assistant

There were no major updates to Information Assistant for this release.

Inquiry

There were no major updates to Inquiry for this release.

Inventory

There were no major updates to Inventory for this release.

Job Cost

There were no major updates to Job Cost for this release.

License Administration



New tool

The License Administration tool is new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to track and assign licenses for your Sage 300 Construction and Real Estate applications.

To access the tool (on the server), select the **Sage Administration** program group, and then select **License Administration**.

- Use the **Licenses** tab to view and allocate the total uses for each application.
- Use the **Mobile Licenses** tab to view and assign licenses to employees for the Mobile Projects application (described on [page 11](#)) and the Mobile Reports application (described on [page 12](#)).

To use License Administration:

- 1 On the server, select the **Sage Administration** program group (from the **Start** menu), and then select **License Administration**.
- 2 On the **Licenses** tab, the table shows the total uses for each application.
 - To allocate all of the available uses for each application, click [**Allocate All Uses**].
 - To allocate just one of the available uses for each application, click [**Allocate One Use**].
 - To allocate another number, type the number in the Allocated Uses column and then click [**Update**].
- 3 If your company purchased licenses for mobile applications, assign these licenses to people:
 - a Click the **Mobile Licenses** tab. The **Allocated uses** shows the number of uses for each mobile application that you can assign.
 - b Click the  to the left of the application name. The table shows the user names of people assigned to the mobile application, if any.
 - c Click [**Add User**] to add another line to the list of users.
 - d In the new line, click  (the browse button) or press **F4**.
 - e In the list on the **Users** window, select the user that you want to add.

Note: The list only includes users who have been set up with a Windows user account in the Desktop Security tool (in the **User Details** window).
 - f Click [**OK**]. That person's user name is added to the list.
 - g Repeat steps 3b - 3f for each person you want to add as a user.
 - h Click [**Update**] on the **Mobile Licenses** tab to save your changes.

Mobile Projects

New application

The Mobile Projects application is new for Sage 300 Construction and Real Estate Version 17.1. With this application, selected employees can enter and manage Field Reports (FRs) and Requests for Information (RFIs) in the field using a mobile device or computer. See the [Introduction to Mobile Projects video](#) for more information.

Note: Mobile Projects uses your company data stored in the SQL database. You must use the SQL Replicator to copy the data stored in the Actian Pervasive database and replicate it into a SQL database. See [page 16](#) for information about the SQL Replicator.

To set up Mobile Projects:

- If you have not done so already for Mobile Reports, set up the Microsoft Azure Active Directory (AAD). When you purchase Mobile Projects, a subscription to the AAD is included. AAD provides a secure connection from your mobile device to your Sage 300 Construction and Real Estate data. You will receive an email with instructions to set up AAD. For more information, see the [Sage SQL Replicator and Sage Construction Central Setup Guide](#).
- Use License Administration to assign the Mobile Projects licenses to the employees. See [page 10](#) for information about License Administration.
- Use Security Administration to select **Mobile Projects**, select **RFIs**, **Cost Management**, **Documents**, **Field Reports**, and/or **Project Administrator**, and select **SQL Data Access** in the Tasks tree to the roles that can access Mobile Projects.

The employees can then use a browser to log into the Sage Construction Central website and select **Mobile Projects** in the menu on the left.

Note: The Mobile Projects application was tested using the following browsers:
Chrome and Internet Explorer 11.
If you use Internet Explorer, you must turn off IE Enhanced Security Configuration or add the website to the "safe" list.

For information about purchasing Mobile Projects, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com). You must also own at least one license of the Project Management application in order to use Mobile Projects.

Known issues

Named Payroll files

At this time, time entry in the Payroll Time observation does not support named Payroll files.

Mobile Reports

New application

The Mobile Reports application is new for Sage 300 Construction and Real Estate Version 17.1 Rev 6. With this application, selected employees can generate and view Crystal Reports in the field using a mobile device or computer. They can also send the reports through email. See the [Introduction to Mobile Reports video](#) for more information.

Note: Mobile Reports uses your company data stored in the SQL database. You must use the SQL Replicator to copy the data stored in the Actian Pervasive database and replicate it into a SQL database. See [page 16](#) for information about the SQL Replicator.

To set up Mobile Reports:

- If you have not done so already for Mobile Projects, set up the Microsoft Azure Active Directory (AAD). When you purchase Mobile Reports, a subscription to the AAD is included. AAD provides a secure connection from your mobile device to your Sage 300 Construction and Real Estate data. You will receive an email with instructions to set up AAD. For more information, see the [Sage SQL Replicator and Sage Construction Central Setup Guide](#).
- Use License Administration to assign the Mobile Reports licenses to the employees. See [page 10](#) for information about License Administration.
- Use Security Administration to elect **Mobile Intelligence, Reports, and SQL Data Access** in the **Tasks** tree to the roles that can access Mobile Reports. To enable a role to add and change information about the reports that can be viewed and organize the reports into groups, also select the **Report Manager** task (under **Mobile Intelligence > Reports**).

The employees can then use a browser to log into the Sage Construction Central website, select **Intelligence** in the menu on the left, and then select **Mobile Reports**.

You can learn more about Mobile Reports and Sage Construction Central website through [complimentary online courses](#) offered by Sage University.

For information about purchasing Mobile Reports, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).

MyAssistant

There were no major updates to MyAssistant for this release.

ODBC

There were no major updates to ODBC for this release.

Resolved issues

Performance improvements

Using a Microsoft Access form with ODBC is now faster than with version 16.1.

Payroll (Australia)

Important! The sample cheque forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal and state laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your cheque forms as needed to ensure compliance.

New features and enhancements

There were no major updates to Australian Payroll for this release.

Payroll (Canada)

Important! The sample cheque forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal and provincial laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your cheque forms as needed to ensure compliance.

There were no major updates to Canadian Payroll for this release.

Payroll (United States)

Important! The sample check forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal, state, and local laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your check forms as needed to ensure compliance.

There were no major updates to US Payroll for this release.

Note about the new Oregon tax

Starting July 2018, there is a new tax for the Oregon State Transportation Improvement Fund (ORTIF) that applies to residents of Oregon and non-residents of Oregon who provide services in Oregon. If this tax applies to your employees, you will need to make the following changes so that Oregon taxes will automatically calculate when the work state on the job or the employee work state is Oregon. See [Knowledgebase article 91505](#) for more information and [Knowledgebase article 95110](#) for the Payroll Update.

- Install Payroll Tax Update 18.09 or later
- Upgrade to Version 17.1 Rev 8 and apply the Payroll Update (17.1.8ortifupdate1.zip)
- Add this tax to the Oregon tax group
- Modify the check stubs and direct deposit notifications to include this tax

If you have employees who live in Oregon but do not work in Oregon, they will still owe this tax. To properly withhold this tax, set up a reciprocity agreement between their work state and Oregon. See [Knowledgebase article 21191](#) for more information. If you do not withhold this tax, the employees will be assessed this tax on their Oregon income tax forms.

Resolved issues in 17.1 Rev 8

ACA information carryover

If you entered information in the **Affordable Care Act Compliance Details** window, when you close the year, the program automatically copies that information to the new year. This includes whether the employee was enrolled in an employer-sponsored self-insured plan.

Resolved issues in 17.1 Rev 7

- If you have a large number of employees, Payroll no longer stops when compiling W-2 forms.
- W-2 form processing is now faster.

Resolved issues in 17.1 Rev 6

Payroll report and ACA compliance fixes

- The New Jersey NJ-927/WR-30 report now shows the Total FLI contributions.
- The Pennsylvania certified payroll report now shows the hourly fringe benefit amount.
- Certified reports generated using Aatrix now exclude Daily Distributions associated with time entries that are not marked certified.
- When clicking [**Use Daily Distributions**] in the **Affordable Care Act Compliance** window, the correct hours now show for all months.

Project Management

There were no major updates to Project Management for this release.

Property Management

There were no major updates to Property Management for this release.

Purchasing

There were no major updates to Purchasing for this release.

Remote Time Entry

There were no major updates to Remote Time Entry for this release.

Report Designer and Reporting

There were no major updates to Report Designer for this release.

Sage System Verifier

There were no major updates to Sage System Verifier for this release.

Security Administration

There were no major updates to Security Administration for this release except to add a section for Sage SQL Replicator.

Server Migration

There were no major updates to Server Migration for this release.

Service Management

There were no major updates to Service Management for this release.

Resolved issues in 17.1 Rev 7

You can now include non-alphanumeric characters (such as dashes and periods) for **Alternative Work Order**.

SQL Replicator

New tool

The SQL Replicator tool is new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to take the Sage 300 Construction and Real Estate data stored in the Actian Pervasive database and replicate it into a SQL database. When you access the data from SQL, reports generally run faster. The new mobile applications also access the data from SQL.

The Sage SQL Replicator is an improvement to the Sage SQL Gateway, which replicated data at a scheduled time each day. Instead, Replicator runs continually and replicates the data as needed.

Important! Before you can run the SQL Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data.

The size of the replicated data is larger than the original Pervasive data because replicator adds views and indexes the data. To determine if you can use SQL Server Express, add the size of the PVData, POIV Data, SM Data folders and the master.qxm file together for each company. If the sum is greater than 6 GB, you should use the full SQL Server version.

To configure and start Replicator, use the new System Administrator tool; see [page 18](#) for more information.

The first full replication may take some time. Replicator will perform additional replications whenever your employees make changes to your company's data. These replications may be almost instantaneous.

Replicator copies the Pervasive data and renames the tables in SQL. It doesn't merge and transform data tables like Gateway did. Thus, it will be easier to change the data source in Crystal Reports.

Note: For the initial releases of Version 17.1, Crystal Reports on the menus will still use the Pervasive database. Starting with 17.1 Rev 5, these Crystal Reports can be set up to run using the SQL database by selecting the **Use SQL** check box.

You can control security for SQL Replicator in Security Administration.

For more information, see the [Sage SQL Replicator and Sage Construction Central Setup Guide](#) and the [Introduction to Sage SQL Replicator video](#).

Enhancements in 17.1 Rev 7

Performance improvements were made for Sage SQL Replicator.

Known issues

Locked tables

Certain processes (such as closing a GL period, month, or year) will temporarily lock a table. If Replicator runs while a table is locked, it skips that table and the table data is not replicated. However, Replicator will retry replication of the table again in 5 minutes. You can also stop Replicator and then (after the process completes) restart Replicator to pick up the table data.

File Security

At this time, file security for the replicated SQL data is not supported.

SM history data

At this time, the Replicator does not replicate Service Management history data.

System Administrator

New tool

The System Administrator tool is new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to:

- Configure and start SQL Replicator; see [page 16](#) for more information.
- Perform a comprehensive backup of your company data (including the global folder, Service Management, Purchasing, and Inventory data), plus the SQL data that was replicated.
- Restore the data from the backup.

You can use the backup and restore procedures in System Administrator even if you do not use the Replicator. See the [Using System Administrator to back up and restore your data](#) video for more information.

Note: You can still use File Tools to back up and restore your company data stored in Pervasive. However, File Tools does not back up and restore the SQL data.

To access the tool (on the server), select the **Sage Administration** program group (from the **Start** menu), and then select **System Administrator**.

Important! As with any backup tool, we recommend that you validate and test the backup to ensure that the process is working properly. Environmental issues and files in use can affect the integrity of a backup.

Restoring your business data requires advanced knowledge of the Actian Pervasive, Microsoft SQL, and Sage 300 Construction and Real Estate file systems. We strongly recommend you undertake this process with a knowledgeable professional, such as your business partner, certified consultant, or Sage Customer Service representative.