

# Important

Read the [Release Notes](#) for details of the version 20.5 release. Read the **Install Sage 300 Construction and Real Estate** chapter of the [User's Guide](#) before you install the software. Review the list of supported operating systems and recommended hardware in the [System Requirements article \(104860\) in the Sage Knowledgebase](#). The latest versions of these and other documents are available from the **Product Documents** web page:

<http://cdn.na.sage.com/Docs/en/customer/300cre/Documentation.htm>

**Note:** 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.

## Government changes

Due to changes in government forms and reporting requirements, you must install version 20.3 or later if you use any of the following applications:

- U. S. Payroll: Version 20.3 and later enables entry of additional codes for Box 14 on the W-2 form, including payments for any sick leave or family leave wages paid under the Families First Coronavirus Response Act. You enter information for Box 14 on the **Amounts** tab of the **Modify W-2 Forms** window.
- Canadian Payroll: Version 20.3 and later includes the new **CQ** code in the **Other Information Boxes** area on the **Amounts** tab of the **Modify T4 Formats** window. When Aatrix processes the T4 information, they will assign code 57, 58, 59, or 60 based on the cheque dates. The Canada Revenue Agency uses this information to validate payments for the Canada Emergency Wage Subsidy (CEWS), Canada Emergency Response Benefit (CERB), and Canada Emergency Student Benefit (CESB). If you create any new T4 formats, you must include the CQ code.
- U. S. Accounts Payable: Version 20.3 and later includes the new 1099-NEC form to report non-employee compensation as well as changes to the 1099-MISC form. You select the form for the vendor on the **1099 Settings** tab of the **Vendor Setup** window. If the **Gross Proceeds Paid to an Attorney** check box is selected on this tab, you must also select **1099-MISC Rents/Gross Proceeds** for **Form Type**.

## Compatible versions

There is no version of Sage Estimating (Pervasive) that is compatible with Sage 300 Construction and Real Estate version 20. However, you can use a compatible version of Sage Estimating (SQL) with Sage 300 Construction and Real Estate version 20.

There is no Sage Document Management version 20. Document Management was retired on December 31, 2019; see [Knowledgebase article 91616](#) for more information about the retirement. You can still run Document Management in a standalone environment; see [Knowledgebase article 91608](#) for more information. DO NOT install Sage 300 Construction and Real Estate Accounting version 20 on the same machine as Document Management.

## Installation

If you are on Sage 300 Construction and Real Estate (Accounting) version 20.1, 20.2, 20.3, 20.4, 18.1, 18.2, 18.3, or 18.4, you can upgrade directly to version 20.5.

If you are on an earlier version, we recommend that you upgrade to 18.4 before upgrading to version 20.

Before upgrading:

1. Create a complete backup of all data and program files for Sage 300 Construction and Real Estate. If you are currently on version 17.1 or later, use the **Backup** tab in Sage System Administrator. If you are on an earlier version, use File Tools to create the backup.
2. Run File Doctor on all files in your current version before upgrading to the next version. Even if you do not receive a corrupt file message, there may be issues File Doctor finds that it will not be able to fix after upgrading to version 20.

## Prerequisite installation

The Sage 300 Construction and Real Estate installation first installs missing prerequisites. If your computer doesn't already have .NET 4.6.2, it will be installed but your computer may need to reboot. After the reboot, the installation should automatically continue. If it does not automatically continue, restart the installation and it will continue from that point.

## Licenses

Beginning with version 17.1 rev 4, 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.

**Important!** If you are upgrading from a version before version 17.1 rev 4, have your **Registration Name** and **Sage Client ID** (Account ID) handy. The ID is a 10-digit number that starts with 4. 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](mailto:CREsales@sage.com)).

You can use the License Administrator tool to manage the uses of your licenses. If you have a test server, assign one use to that server in the **License Administrator** window. Assign the remaining uses to your production server so they will then be available for your staff.

If you plan to migrate the software to another server, you must deauthorize the licenses (by clicking **[Deauthorize Server]** in the **License Administrator** window) on the existing server before migrating. Also, you must deauthorize the licenses on the sever before uninstalling, wiping, or reconfiguring that server.

## SQL Replicator installation

Version 20 includes Sage SQL Replicator 2.0, which is an improved version of the replicator that was introduced in Version 17.1. Use the replicator to copy your Sage 300 Construction and Real Estate data stored in the Actian Pervasive database into a SQL database, which enables faster data access for reports. The data is also available for mobile applications, such as Sage Mobile Dashboard, Sage Mobile Reports, Sage Field Operations, and Sage Construction Project Center.

Before you can use the Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. (You cannot install SQL Server on a Domain Controller.) Also install SQL Replicator 2.0 by downloading the **SageSQLReplicator.exe** file and running the installation on your

Sage 300 Construction and Real Estate Accounting server. For detailed information, see the [Sage SQL Replicator Setup Guide](#).

**Important!** If you used an earlier version of Sage SQL Replicator, follow the steps in [Knowledgebase article 104917 \(Preparing your SQL data prior to upgrading to Replicator 2.0\)](#) before you install.

**Note:** 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 must use the full SQL Server version. To save space, you can configure replicator so that only certain tables are replicated.

If your company plans to use mobile applications, click [[Link to Mobile](#)].

To configure Replicator 2.0:

1. Open the System Administrator tool (found in the **Sage Administration** program group).
2. Connect to the SQL server.
3. In the table on the **Replicator Settings** tab in **System Administrator**, highlight the company folder that you want to configure for replication, and then click [**Configure**].
4. On the **Settings** tab of the **Configuration Manager** window, click [**Settings**] at the end of the row for the company to replicate.
5. In the **Table Selection** window, select the Enable Replication check box, select the tables to replication, and make any other changes, and then click [**Save**].
6. Click [**Start**] to begin the replication based on these settings.

## Mobile applications

You can purchase the following mobile applications. On a mobile device or computer, your employees use a browser to log into the Sage Construction Central website to access these applications.

- **Mobile Reports:** Enables your employees to generate and view Crystal Reports in the field. They can also send the reports through email.
- **Mobile Dashboard:** Enables your employees to view dashboards and dashboard reports with visual information about the state of your company.

When you purchase these mobile applications, a subscription to the Microsoft Azure Active Directory (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 and Mobile Projects. For more information, see the [Sage Construction Central Setup Guide](#).

**Note:** These mobile applications were tested using Chrome and Internet Explorer 11. If you use Chrome to view generated Mobile Reports (in your Sage Construction Central Inbox), set Chrome to allow pop-ups from your Sage Construction Central web address. If you use Internet Explorer, you must turn off IE Enhanced Security Configuration or add the website to the "safe" list.

## Macros

In Sage 300 Construction and Real Estate version 17.1 Rev 5, the **Use SQL** check box was added to enable Crystal Reports to run against the SQL database instead of the Pervasive database. If you wrote a macro to run a Crystal Report before version 17.1 Rev 5, you will need to set up the macro again to run the report in version 20.