



Sage 300 2016

Web Screens

Getting Started Guide

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Discover Sage 300 Web Screens

Sage 300 web screens bring the power of Sage 300 to your web browser.

Whether you're using your desktop computer, your laptop, or your tablet, now you can enter transactions, generate reports, manage company finances, and more—anywhere, anytime.


Web screens run in parallel with the classic 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.

Read on for a quick overview of what's available in Sage 300 web screens.

Some features described here may not be available in your Sage 300 system.

Home Page

Use the home page to find and open program features and reports; to review key business information; and to find help and resources.

- **Find and open program features and reports.** On the home page, use the navigation menu to find and open program features ("windows") and reports. After opening a feature or report, click the Help  menu to browse related help articles and find additional resources.
- **Navigate between open windows and reports.** Use the Window Manager at the right of the screen to switch between open windows, or to close windows.
- **Review key performance indicators for your business.** Add and set up widgets on the home page to see key business information at a glance.

Administration

Administrators can use web screens to update company information and maintain data.

- **Set up your company.** Create your company profile and optional fields and set up your fiscal calendar.

- **Maintain your data.** Check data integrity and review restart records to resolve data issues and recover from errors.

Financial Management

Use financial modules to set up your general ledger, maintain banking and tax information, and manage payables and receivables.

- **General Ledger.** General Ledger supports multicurrency accounting, integrates extensively with other program features, and supports import and export of transaction data for use with other programs. Set up and maintain your general ledger accounts, enter or transfer transactions from various sources, and print reports.
- **Bank Services.** Bank Services centralizes payments and receipts for all Sage 300 accounting features. Set up bank information, track and manage payments and receipts, reverse payments, return NSF items, perform reconciliations with bank statements, and create General Ledger batches for information from bank statements and miscellaneous monthly transactions.
- **Tax Services.** Tax Services centralizes tax information on sales and purchases for all Sage 300 accounting features. Set up tax tables, tax calculation rules, and tax audit information.
- **Accounts Payable.** Accounts Payable handles all your payables record keeping and reporting needs. Set up and maintain vendor accounts; enter or import transactions; print checks; and track vendor account and transaction details on screen and on printed reports.
- **Accounts Receivable.** Accounts Receivable handles all your receivables record keeping and reporting needs. Set up and maintain your customer accounts; enter or import transactions; print invoices; and track account and transaction details on screens and on printed reports.

Operations Management

Use operations modules to process payments, manage inventory, and process customer and vendor transactions.

- **Payment Processing.** Set up Payment Processing to process credit card payments from your customers.

- **Inventory Control.** Inventory Control maintains detailed perpetual inventory records and produces reports to help you manage your stock effectively. Set up and track inventory items, enter and post transactions, and print reports.
- **Order Entry.** Order Entry handles all your order entry, invoicing, and order tracking needs, regardless of the size and complexity of your business. Process orders and shipments, track transaction details and sales information, and print invoices, quotes, order confirmations, picking slips, credit notes, debit notes, and shipping labels.
- **Purchase Orders.** Purchase Orders provides all the transaction entry, processing, and reporting features you need to fully automate your purchase order procedures and meet your management needs. Enter and process purchase requisitions, purchase orders, receipts, vendor invoices, returns, credit notes, and debit notes, and print forms and mailing labels for your vendor transactions.

Reports

Print financial reports, transaction reports, and other key business information.

Frequently Asked Questions

Find answers to frequently asked questions about Sage 300 web screens.

General Questions

What's the difference between web screens, the Sage 300 Portal, and web deployment?

- **Web screens** are redesigned versions of Sage 300 desktop screens that you use in a web browser. You open web screens from a new browser-based home page, which also features widgets that you can customize to display key business information.
- **The Sage 300 Portal** provides access to Sage 300 *desktop screens* in a web browser. It features a Shortcuts toolbar, snapshots of your accounting data, and the Sage 300 ad hoc Inquiry tool.
- **Web deployment** provides a web-based platform for accessing Sage 300 *desktop screens* using IIS and remote access technology (Microsoft .NET Framework or Distributed COM remoting). Web deployment is not required in order to use Sage 300 web screens.

Do web screens replace the Sage 300 Portal?

Not yet. The Portal is still available in Sage 300, and is still required if you use the quotes-to-orders feature in Sage CRM.

Web screens use the Portal database, so if you already use the Portal, you do not need to create or set up a new database to start using web screens. For more information, see "Installing Sage 300 Web Screens" (page 14).

Are all modules and screens from the Sage 300 Desktop available as web screens?

Not all modules and screens from the Sage 300 Desktop are available as web screens.

A selection of frequently used screens from the following Sage 300 modules are available as web screens, with more screens planned for upcoming releases:

- Administrative Services
- Common Services
- Bank Services
- Tax Services
- General Ledger
- Accounts Payable
- Accounts Receivable
- Inventory Control
- Order Entry
- Purchase Orders
- Payment Processing

For a list of available web screens, see "List of Web Screens" (page 21).

Are the web screens identical to the desktop screens?

While most of the browser screens are similar to their counterparts in the Sage 300 Desktop, the new screens have been redesigned to work in a browser and deliver an improved user experience.

Among other changes, we've spelled out potentially confusing abbreviated labels, revised messages so they're simpler and friendlier, and redesigned a number of controls on the user interface to streamline and simplify tasks.

Can I use web screens and desktop screens at the same time?

Yes, you can. For example, if you have customized some desktop screens, you can continue to use those while using the web screens for other tasks.

Do I need to install Sage 300 or any other software on every computer or device that will be used to access the web screens?

You do not need to install any software other than a web browser. However, all computers or devices that will be used to access the web screens must be connected to the network on which the Sage 300 server is running.

Product Features

Are web screens available in languages other than English?

Web screens are available in English, French, Spanish, and Chinese (Simplified and Traditional). Help and documentation for web screens is available in English and French.

Are optional fields supported in web screens?

Yes.

Are multicurrency systems supported?

Yes.

Is Payment Processing available?

Yes.

Are Intercompany Transfers available?

No. To manage intercompany transfers, use Sage 300 desktop screens.

Is Project and Job Costing available?

No. To manage projects and jobs, or to process job-related transactions, use Sage 300 desktop screens.

Are Operations modules available?

Yes. A selection of frequently used screens from Inventory Control, Order Entry, and Purchase Orders are available as web screens, with more screens planned for upcoming releases.

Reporting and Intelligence

What reporting and intelligence features are available in web screens?

Web screens use SAP Crystal Reports® to generate reports.

Sage 300 Intelligence Reporting is not available in web screens, but is available in the Sage 300 Desktop.

Are custom forms and reports supported?

Yes, with exceptions. If you have customized versions of the standard forms and reports included with Sage 300, they will be available in web screens, as long as the report file name has not been changed. However, any new custom forms or reports you create will not be available for use in web screens.

Hardware and Software Requirements

What hardware and software do I need to use web screens?

For current information about minimum system requirements, see the Compatibility Guide:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

Do I need to use a PC?

You can use any computer or device with a current web browser to view and use web screens.

The screens are not optimized for display on mobile devices, so are not currently recommended for use on a tablet or mobile phone.

Which web browsers are supported?

Current versions of the most popular web browsers are supported.

For details, see the Compatibility Guide:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

Do web screens use Apache Tomcat?

No. Web screens use Microsoft .NET and Internet Information Services (IIS).

The existing Sage 300 Portal uses Apache Tomcat, and is still required to support the quotes-to-orders feature in Sage CRM.

Customization

Are custom forms and reports supported?

Yes, with exceptions. If you have customized versions of the standard forms and reports included with Sage 300, they will be available in web screens, as long as the report file name has not been changed. However, any new custom forms or reports you create will not be available for use in web screens.

What other customizations are supported?

All existing customizations are supported in desktop screens, but not in web screens. Future releases may include support for customization.

Are ISVs or third-party applications supported?

ISVs and third-party applications are not currently supported in web screens.

ISVs and third-party applications should work as expected in the Sage 300 Desktop, or may require a compatibility release to work with the current release.

Are Visual Basic macros supported?

Macros are not supported in web screens, but are still supported in desktop screens.

Can I modify application files, DLL files, and INI files?

Modifying these files to make changes to web screens is not supported.

You can continue to modify these files to make changes to the Sage 300 Desktop.

Is a Software Development Kit (SDK) available?

Yes, an SDK is available for Sage 300 web screens. For more information about Sage Development Partner Programs, visit www.sage.com/us/partners.

Getting Started with Sage 300 Web Screens

Find general information on how to get started with Sage 300 web screens.

Installing Sage 300 Web Screens

Sage 300 web screens are installed with Sage 300 when you select the **Web Screens** option during installation.

Important! When using Sage 300 web screens over an external network or the internet, data must be protected with security measures such as Secure Socket Layer (SSL) or a Virtual Private Network (VPN). To determine appropriate security measures, consult with your information technology (IT) professional or Sage Business Partner.

The lists below provide a quick overview of additional steps required to install and start using Sage 300 web screens. For complete installation and setup instructions, see the *Sage 300 Installation and Administration Guide*.

Before installing Sage 300:

1. Verify that your system meets all hardware and software requirements listed in the Compatibility Guide:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

2. Install Microsoft Internet Information Services (IIS) if you have not already done so. (*Sage 300 Installation and Administration Guide* Chapter 5)

Note: If you encounter any issues when trying to use web screens after installing, see the Troubleshooting section in Chapter 5 for additional information about IIS settings.

3. In Microsoft SQL Server Management Studio, create a Portal database if you have not already done so. This database is used by both the Sage 300 Portal and Sage 300 web screens. (*Sage 300 Installation and Administration Guide* Chapter 3)

When you install Sage 300:

1. On the Select Features screen, select the **Web Screens** option.
2. If any users will use web screens in a language other than English, select the relevant language pack.

After installing Sage 300:

1. Configure the Portal database, which is used by both the Sage 300 Portal and Sage 300 web screens. (*Sage 300 Installation and Administration Guide* Chapter 5)
2. Ensure that users have security authorization to access all modules and screens they need to use. (*Sage 300 Installation and Administration Guide* Chapter 6)
3. Activate all modules for which you want to use Sage 300 web screens.

Note: Administrative Services, Common Services, and General Ledger must be activated before you can sign in to Sage 300 web screens.

When installation and setup are complete, you are ready to sign in and start using Sage 300 web screens.

Signing in to Sage 300 in a Browser

To use Sage 300 web screens, you sign in to Sage 300 in your web browser, using the same credentials you use to sign in to the Sage 300 Desktop.

The computer or device you use to sign in does not need to have Sage 300 installed, but it does need to be connected to the network on which the Sage 300 server is running.

Sage 300 web screens support current versions of the most popular web browsers. For current information about supported browsers, see the Compatibility Guide:

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>

To sign in to Sage 300 in a browser:

1. Visit <http://servername/sage300>, where *servername* is the server name or IP address of the web server where Sage 300 is installed.
2. Enter your username and password.

3. Select a company.
4. Click **Sign In**.

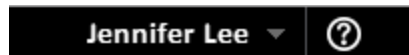
Note: If web screens do not appear in the language specified in your Sage 300 user record, select that language in your web browser settings as your preferred language for viewing web pages.

Finding and Learning about Features

Sage 300 includes a number of tools to help you find and learn about program features in the web screens.

Welcome bar

At the top of the screen, the welcome bar displays your company name, the Account menu, and the Help menu.

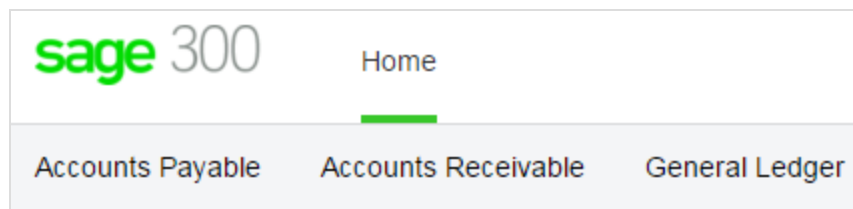


You use the Account menu to sign out of Sage 300, and to navigate to any available connected services.

The Help menu lists articles and resources related to the window you are viewing, as well as a search field you can use to search for specific terms in the Help Center.

Navigation menu

Windows and reports are organized into "modules" on the navigation menu. When you sign in, Sage 300 displays modules, windows, and reports you are authorized to view and use.



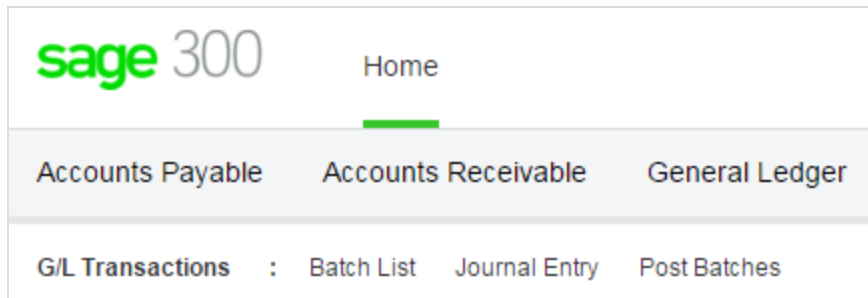
Features differ by module, but are usually organized into some or all of the following categories:

- **Setup and Setup Reports.** Specify setup options and print reports of setup options specified for a module.
- **Transactions and Transaction Reports.** Process transactions and print transaction reports, including forms such as invoices and receipts.
- **Periodic Processing.** Perform periodic processing tasks such as creating batches and running Day End Processing.
- **Reports.** Set up and print reports.

Quick links

When you select a window or report from the navigation menu, a list of quick links to related windows appears below the navigation menu.

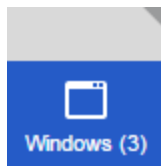
For example, when you open a G/L transaction window, quick links to other G/L transaction windows appear below the menu.




Managing Windows and Tasks

You use the Window Manager to open, manage, and navigate between multiple windows in Sage 300.

The Window Manager appears at the right side of your browser window when you are using Sage 300, and displays the number of windows you have open.



To see a list of open windows, click the Window Manager. On the **Open Windows** list, you can click a window to navigate to it, or click the Close  button to close a window.

To move the window manager icon, drag it up or down the right side of your screen.

Note: If you close all windows, Sage 300 displays your home page.

Customizing the Navigation Menu

Use the Customize Navigation Menu screen to customize the screens that are available on the navigation menu.

For example, you can hide the A/R Invoice Entry web screen, or the A/R Transactions category, or the Accounts Receivable module.

If you hide all web screens in a category, the category does not appear in the navigation menu. If you hide all web screens and categories in a module, the module does not appear in the navigation menu.

Web screens are hidden or shown by company according to the selections you make on the Customize Navigation Menu screen. If you manage multiple companies, you must sign in to each company separately to specify which web screens are hidden or shown for users who sign in to that company.

Desktop screens are hidden and shown based on user authorizations and security groups. Using the Customize Navigation Menu to hide or show a web screen has no effect on the corresponding desktop screen.

Before you start


- You must be signed in as an administrator to use the Customize Navigation Menu screen.
- You can make changes to the navigation menu while other users are signed in, but they will not see the changes until they refresh their browser or sign out and sign in again.
- To open any screen that appears on the navigation menu, users must be assigned to a security group that is authorized to use the screen.

To customize the navigation menu:

1. Open **More > Administrative Services > Customize Navigation Menu**.
2. Clear check boxes to hide screens, categories, or modules from the navigation menu.
 - To hide a screen (such as Invoice Entry), clear the check box for the screen.
 - To hide a category (such as A/R Transactions), clear the check box for the category.
 - To hide a module, clear the check boxes for all categories for the module.
3. Select check boxes to show hidden screens, categories, or modules in the navigation menu.
 - To show a screen (such as Invoice Entry), select the check box for the screen.
 - To show a category (such as A/R Transactions), select the check box for the category, or select one or more screens in the category.
 - To show a module, select the check box for one or more categories or screens in the module.
4. Click **Save**.

Setting Up Home Page Widgets

Set up widgets on your home page to view key business information at a glance.

To add widgets to your home page, click the **Add Widgets** menu  and select widgets to add. The widget or widgets you selected are added to your home page in the order you selected them.


To arrange widgets, point to the title bar of a widget, and then drag it to a new position.

Note: Figures displayed in widgets are in your company's functional currency.

Widget settings and options

In the title bar of each widget, the **Widget Settings** menu  displays some or all of the following options:

- **Edit Settings.** Specify criteria for data to be displayed in the widget. Depending on the widget, you may do this by specifying the year and period; by selecting specific accounts, transactions, and amounts; or by specifying other settings.
- **Edit Title.** Enter a new name for the widget.

- **Refresh.** Refresh the data displayed in the widget.
- **Close.** Remove the widget from your home page. You can add the widget to your home page again by selecting it from the **Add Widgets** menu  .

Errors while viewing widgets

If a "Cannot Display Widget" error message appears in one or more widgets on the home page, it may be caused by one of the following issues.

- **Missing data.** No data has been entered in your Sage 300 system to be displayed in the widget. For example, if you have not entered any income or expenses, the Income and Expenses widget may display an error message.
- **Temporary issues retrieving data.** Data has been entered but is currently unavailable. This may happen during temporary issues with network connectivity.
- **Other setup or application issues.** Data is available, but the widget cannot be displayed due to a setup issue or a temporary issue with Sage 300.

If the problem persists, contact your system administrator, or contact Sage for technical support.

Appendix A: List of Web Screens

New web screens are added with each Sage 300 release and product update. Consult this list to see web screens that are available in the Sage 300 version and modules you use.

If a web screen is not available for the task you need to perform, you may be able to use a Sage 300 desktop screen.

For general information and an overview of web screens that have been added with each release and product update, see *What's New in Sage 300*.

Financial web screens

Financial modules include General Ledger, Accounts Payable, and Accounts Receivable.

General Ledger web screens

Category	Screen	2016	2016.1
<i>G/L Accounts</i>	<i>Account History Inquiry</i>		
G/L Accounts	Accounts	✓	✓
<i>G/L Accounts</i>	<i>Budget Maintenance</i>		
<i>G/L Accounts</i>	<i>Chart of Accounts</i>		
<i>G/L Accounts</i>	<i>Create Accounts</i>		
G/L Accounts	Fiscal Set Comparison		✓
<i>G/L Accounts</i>	<i>Source Currency Inquiry</i>		
<i>G/L Accounts</i>	<i>Source Currency Inquiry</i>		
<i>G/L Accounts</i>	<i>Transaction History</i>		

Category	Screen	2016	2016.1
G/L Periodic Processing	Clear History		✓
G/L Periodic Processing	Consolidate Posted Transactions		✓
G/L Periodic Processing	Create Allocation Batch		✓
G/L Periodic Processing	Create New Year	✓	✓
G/L Periodic Processing	Create Recurring Entries Batch	✓	✓
<i>G/L Periodic Processing</i>	<i>Create Revaluation Batch</i>		
G/L Periodic Processing	Period End Maintenance	✓	✓
<i>G/L Reports</i>	<i>Account Groups Report</i>		
<i>G/L Reports</i>	<i>Account Structures Report</i>		
G/L Reports	Batch Listing Report	✓	✓
G/L Reports	Batch Status Report		✓
G/L Reports	Chart of Accounts Report	✓	✓
<i>G/L Reports</i>	<i>Optional Fields Report</i>		
<i>G/L Reports</i>	<i>Options Report</i>		
G/L Reports	Posting Journals Report	✓	✓
<i>G/L Reports</i>	<i>Recurring Entries Report</i>		
<i>G/L Reports</i>	<i>Revaluation Codes Report</i>		
<i>G/L Reports</i>	<i>Segment Codes Report</i>		
<i>G/L Reports</i>	<i>Source Codes Report</i>		
<i>G/L Reports</i>	<i>Source Journal Profiles Report</i>		
<i>G/L Reports</i>	<i>Source Journals Report</i>		

Category	Screen	2016	2016.1
G/L Reports	Transaction Listing Report	✓	✓
G/L Reports	Transaction Details Optional Fields Report	✓	✓
G/L Reports	Trial Balance Report	✓	✓
G/L Setup	Account Groups	✓	✓
G/L Setup	Account Structures	✓	✓
G/L Setup	Optional Fields	✓	✓
G/L Setup	Options	✓	✓
G/L Setup	Recurring Entries	✓	✓
<i>G/L Setup</i>	<i>Revaluation Codes</i>		
G/L Setup	Segment Codes	✓	✓
G/L Setup	Source Codes	✓	✓
<i>G/L Setup</i>	<i>Source Journal Profiles</i>		
G/L Transactions	Batch List	✓	✓
G/L Transactions	Journal Entry	✓	✓
G/L Transactions	Post Batches	✓	✓

Accounts Payable web screens

Category	Screen	2016	2016.1
A/P Periodic Processing	1099 Electronic Filing	✓	✓
A/P Periodic Processing	Clear History		✓

Category	Screen	2016	2016.1
A/P Periodic Processing	Clear Statistics		✓
A/P Periodic Processing	Create G/L Batch	✓	✓
A/P Periodic Processing	Create Recurring Payable Batch	✓	✓
A/P Periodic Processing	Create Retainage Batch		✓
A/P Periodic Processing	Delete Inactive Records		✓
A/P Periodic Processing	Revaluation		✓
A/P Periodic Processing	T5018(CPRS) Electronic Filing	✓	✓
A/P Periodic Processing	Year End	✓	✓
A/P Setup	1099/CPRS Codes	✓	✓
A/P Setup	Account Sets	✓	✓
A/P Setup	Distribution Codes	✓	✓
A/P Setup	Distribution Sets	✓	✓
A/P Setup	Email Messages	✓	✓
A/P Setup	G/L Integration	✓	✓
A/P Setup	Optional Fields	✓	✓
A/P Setup	Options	✓	✓
A/P Setup	Payment Codes	✓	✓
A/P Setup	Payment Selection Codes	✓	✓
A/P Setup	Terms	✓	✓

Category	Screen	2016	2016.1
A/P Transaction Reports	Aged Cash Requirements Report	✓	✓
A/P Transaction Reports	Aged Payables Report	✓	✓
A/P Transaction Reports	Aged Retainage Report	✓	✓
A/P Transaction Reports	Batch Listing Report	✓	✓
A/P Transaction Reports	Batch Status Report		✓
A/P Transaction Reports	Check Register Report	✓	✓
A/P Transaction Reports	G/L Transactions Report	✓	✓
A/P Transaction Reports	Posting Errors Report	✓	✓
A/P Transaction Reports	Posting Journals Report		✓
A/P Transaction Reports	Vendor Transactions Report	✓	✓
<i>A/P Transactions</i>	<i>Adjustment Batch List</i>		
<i>A/P Transactions</i>	<i>Adjustment Entry</i>		
<i>A/P Transactions</i>	<i>Adjustment Entry</i>		
A/P Transactions	Control Payments	✓	✓
A/P Transactions	Create Payment Batch	✓	✓
A/P Transactions	Invoice Batch List	✓	✓
A/P Transactions	Invoice Entry	✓	✓
A/P Transactions	Payment Batch List	✓	✓
A/P Transactions	Payment Entry	✓	✓
A/P Transactions	Payment Inquiry	✓	✓

Category	Screen	2016	2016.1
A/P Transactions	Post Batches	✓	✓
A/P Vendor Reports	Letters/Labels Report	✓	✓
A/P Vendor Reports	Print 1099/1096 Forms Report	✓	✓
A/P Vendor Reports	Print T5018(CPRS) Forms Report	✓	✓
A/P Vendor Reports	Recurring Payables Report		✓
A/P Vendor Reports	Remit-To Locations Report		✓
A/P Vendor Reports	Vendor Groups Report		✓
A/P Vendor Reports	Vendors Report	✓	✓
A/P Vendors	1099/CPRS Inquiry	✓	✓
A/P Vendors	Recurring Payables		✓
A/P Vendors	Remit-To Locations		✓
A/P Vendors	Vendor Activity	✓	✓
A/P Vendors	Vendor Groups	✓	✓
A/P Vendors	Vendors	✓	✓

Accounts Receivable web screens

Category	Screen	2016	2016.1
A/R Customer Reports	Customer Groups Report		✓
A/R Customer Reports	Customers Report	✓	✓

Category	Screen	2016	2016.1
A/R Customer Reports	Labels Report	✓	✓
A/R Customer Reports	National Accounts Report		✓
A/R Customer Reports	Recurring Charges Report		✓
A/R Customer Reports	Ship-To Locations Report		✓
A/R Customer Reports	Statements/Letters/Labels Report	✓	✓
A/R Customers	Customer Groups	✓	✓
<i>A/R Customers</i>	<i>Customer Inquiry</i>		
<i>A/R Customers</i>	<i>Customer List</i>		
A/R Customers	Customers	✓	✓
A/R Customers	National Accounts	✓	✓
A/R Customers	Recurring Charges		✓
A/R Customers	Ship-To Locations	✓	✓
A/R Periodic Processing	Clear History		✓
A/R Periodic Processing	Clear Statistics		✓
A/R Periodic Processing	Create G/L Batch	✓	✓
A/R Periodic Processing	Create Interest Batch	✓	✓
A/R Periodic Processing	Create Recurring Charge Batch		✓
A/R Periodic Processing	Create Retainage Batch		✓
A/R Periodic Processing	Clear Write-Off Batch		✓
A/R Periodic Processing	Delete Inactive Records		✓

Category	Screen	2016	2016.1
A/R Periodic Processing	Revaluation		✓
<i>A/R Periodic Processing</i>	<i>Update Recurring Charges</i>		
A/R Periodic Processing	Year End	✓	✓
A/R Setup	Account Sets	✓	✓
A/R Setup	Billing Cycles	✓	✓
A/R Setup	Comment Types	✓	✓
A/R Setup	Distribution Codes	✓	✓
A/R Setup	Dunning Messages	✓	✓
A/R Setup	Email Messages	✓	✓
A/R Setup	G/L Integration	✓	✓
A/R Setup	Interest Profiles	✓	✓
A/R Setup	Items		✓
A/R Setup	Optional Fields	✓	✓
A/R Setup	Options	✓	✓
A/R Setup	Payment Codes	✓	✓
A/R Setup	Salespersons	✓	✓
A/R Setup	Terms	✓	✓
A/R Transaction Reports	Aged Retainage Report	✓	✓
A/R Transaction Reports	Aged Trial Balance Report	✓	✓

Category	Screen	2016	2016.1
A/R Transaction Reports	Batch Listing Report	✓	✓
A/R Transaction Reports	Batch Status Report		✓
A/R Transaction Reports	Customer Transactions Report	✓	✓
A/R Transaction Reports	Deposit Slips Report		✓
A/R Transaction Reports	G/L Transactions Report	✓	✓
A/R Transaction Reports	Invoices Report	✓	✓
A/R Transaction Reports	Item Sales History Report	✓	✓
A/R Transaction Reports	Posting Errors Report	✓	✓
A/R Transaction Reports	Posting Journals Report		✓
A/R Transaction Reports	Receipts Report	✓	✓
<i>A/R Transactions</i>	<i>Adjustment Batch List</i>		
<i>A/R Transactions</i>	<i>Adjustment Entry</i>		
<i>A/R Transactions</i>	<i>Adjustment Entry</i>		
<i>A/R Transactions</i>	<i>Document Inquiry</i>		
<i>A/R Transactions</i>	<i>Document Inquiry</i>		
A/R Transactions	Invoice Batch List	✓	✓
A/R Transactions	Invoice Entry	✓	✓
A/R Transactions	Post Batches	✓	✓
<i>A/R Transactions</i>	<i>Quick Receipt Entry</i>		
A/R Transactions	Receipt Batch List	✓	✓

Category	Screen	2016	2016.1
A/R Transactions	Receipt Entry	✓	✓
<i>A/R Transactions</i>	<i>Receipt Inquiry</i>		
<i>A/R Transactions</i>	<i>Refund Batch List</i>		
<i>A/R Transactions</i>	<i>Refund Entry</i>		
<i>A/R Transactions</i>	<i>Refund Inquiry</i>		

Operations web screens

Operations modules include Inventory Control, Order Entry, Purchase Orders, and Payment Processing.

Inventory Control web screens

Category	Screen	2016	2016.1
<i>I/C Items and Price Lists</i>	<i>Bills of Material</i>		
<i>I/C Items and Price Lists</i>	<i>Contract Pricing</i>		
<i>I/C Items and Price Lists</i>	<i>Copy Bills of Material</i>		
<i>I/C Items and Price Lists</i>	<i>Copy Item Pricing</i>		
I/C Items and Price Lists	Customer Details		✓
I/C Items and Price Lists	Item Pricing		✓
I/C Items and Price Lists	Items		✓
<i>I/C Items and Price Lists</i>	<i>Items Wizard</i>		
I/C Items and Price Lists	Kitting Items		✓
I/C Items and Price Lists	Location Details		✓

Category	Screen	2016	2016.1
<i>I/C Items and Price Lists</i>	<i>Lot Numbers</i>		
I/C Items and Price Lists	Manufacturers' Items		✓
<i>I/C Items and Price Lists</i>	<i>Optimize Inventory</i>		
I/C Items and Price Lists	Reorder Quantities		✓
<i>I/C Items and Price Lists</i>	<i>Serial Numbers</i>		
<i>I/C Items and Price Lists</i>	<i>Update Bills of Material</i>		
<i>I/C Items and Price Lists</i>	<i>Update Item Pricing</i>		
I/C Items and Price Lists	Update Item Pricing		✓
I/C Items and Price Lists	Vendor Details		✓
<i>I/C Periodic Processing</i>	<i>Clear History</i>		
I/C Periodic Processing	Create G/L Batch		✓
I/C Periodic Processing	Day End Processing		✓
<i>I/C Periodic Processing</i>	<i>Delete Inactive Records</i>		
<i>I/C Periodic Processing</i>	<i>Lot Recalls/Releases</i>		
<i>I/C Periodic Processing</i>	<i>Lot Splits/Combines</i>		
<i>I/C Periodic Processing</i>	<i>Process Adjustments</i>		
<i>I/C Periodic Processing</i>	<i>Quarantine Release</i>		
<i>I/C Periodic Processing</i>	<i>Serial Registration</i>		
<i>I/C Periodic Processing</i>	<i>Serial/Lot Reconciliations</i>		
<i>I/C Periodic Processing</i>	<i>Warranty Update</i>		
I/C Physical Inventory	Generate Inventory Worksheet		✓

Category	Screen	2016	2016.1
I/C Physical Inventory	Inventory Counts		✓
I/C Physical Inventory	Inventory Reconciliation		✓
I/C Physical Inventory	Inventory Worksheet		✓
I/C Physical Inventory	Physical Inventory Quantities		✓
I/C Physical Inventory	Post Inventory Reconciliation		✓
I/C Price/Sales Analysis Reports	Contract Pricing Report		✓
I/C Price/Sales Analysis Reports	G/L Transactions Report		✓
I/C Price/Sales Analysis Reports	Markup Analysis Report		✓
I/C Price/Sales Analysis Reports	Posting Journals Report		✓
I/C Price/Sales Analysis Reports	Price Lists Report		✓
I/C Price/Sales Analysis Reports	Sales Statistics Report		✓
I/C Price/Sales Analysis Reports	Selling/Price Margin Analysis Report		✓
I/C Price/Sales Analysis Reports	Transaction History Report		✓
I/C Price/Sales Analysis Reports	Transaction Statistics Report		✓
I/C Setup	Account Sets		✓
I/C Setup	Categories		✓
<i>I/C Setup</i>	<i>Contract Codes</i>		
I/C Setup	G/L Integration		✓
I/C Setup	Item Structures		✓

Category	Screen	2016	2016.1
I/C Setup	Locations		✓
<i>I/C Setup</i>	<i>Mask Structures</i>		
I/C Setup	Optional Fields		✓
I/C Setup	Options		✓
I/C Setup	Price List Codes		✓
I/C Setup	Segment Codes		✓
I/C Setup	Units of Measure		✓
<i>I/C Setup</i>	<i>Warranty Codes</i>		
I/C Setup	Weight Units of Measure		✓
<i>I/C Setup Reports</i>	<i>Account Sets Report</i>		
I/C Setup Reports	Alternate Items		✓
<i>I/C Setup Reports</i>	<i>Bills of Material Report</i>		
<i>I/C Setup Reports</i>	<i>Categories Report</i>		
<i>I/C Setup Reports</i>	<i>Item Structures Report</i>		
<i>I/C Setup Reports</i>	<i>G/L Integration Report</i>		
<i>I/C Setup Reports</i>	<i>Kitting Items Report</i>		
<i>I/C Setup Reports</i>	<i>Location Details Report</i>		
<i>I/C Setup Reports</i>	<i>Locations Report</i>		
<i>I/C Setup Reports</i>	<i>Manufacturers' Items Report</i>		
<i>I/C Setup Reports</i>	<i>Mask Structures Report</i>		
<i>I/C Setup Reports</i>	<i>Options Report</i>		

Category	Screen	2016	2016.1
<i>I/C Setup Reports</i>	<i>Optional Fields Report</i>		
<i>I/C Setup Reports</i>	<i>Price List Codes Report</i>		
<i>I/C Setup Reports</i>	<i>Reorder Quantities Report</i>		
<i>I/C Setup Reports</i>	<i>Segment Codes Report</i>		
<i>I/C Setup Reports</i>	<i>Units of Measure Report</i>		
<i>I/C Setup Reports</i>	<i>Vendor Details Report</i>		
<i>I/C Setup Reports</i>	<i>Warranty/Contract Codes Report</i>		
<i>I/C Setup Reports</i>	<i>Weight Units of Measure Report</i>		
<i>I/C Statistics and Inquiries</i>	<i>BOM Component Usage Inquiry</i>		
I/C Statistics and Inquiries	Current Transactions Inquiry		✓
I/C Statistics and Inquiries	Item Location Detail Quantity Inquiry		✓
I/C Statistics and Inquiries	LIFO/FIFO Inquiry		✓
<i>I/C Statistics and Inquiries</i>	<i>Lot Number Inquiry</i>		
I/C Statistics and Inquiries	Sales Statistics		✓
<i>I/C Statistics and Inquiries</i>	<i>Serial Number Inquiry</i>		
I/C Statistics and Inquiries	Stock Transaction Inquiry		✓
I/C Statistics and Inquiries	Transaction History Inquiry		✓
I/C Statistics and Inquiries	Transaction Statistics		✓
I/C Stock Control Reports	Aged Inventory Report		✓
I/C Stock Control Reports	Bin/Shelf Labels Report		✓
I/C Stock Control Reports	Inventory Movement Report		✓

Category	Screen	2016	2016.1
I/C Stock Control Reports	Item Labels Report		✓
I/C Stock Control Reports	Item Status Report		✓
I/C Stock Control Reports	Item Valuation Report		✓
I/C Stock Control Reports	Overstocked Items Report		✓
<i>I/C Stock Control Reports</i>	<i>Quarantine Report</i>		
<i>I/C Stock Control Reports</i>	<i>Recall Report</i>		
I/C Stock Control Reports	Reorder Report		✓
<i>I/C Stock Control Reports</i>	<i>Serial/Lot Number List Report</i>		
<i>I/C Stock Control Reports</i>	<i>Serial/Lot Quantity on Hand Report</i>		
<i>I/C Stock Control Reports</i>	<i>Serial/Lot Stock Listing Report</i>		
<i>I/C Stock Control Reports</i>	<i>Serial/Lot Transactions Report</i>		
I/C Stock Control Reports	Slow Moving Items Report		✓
I/C Stock Control Reports	Stock Transactions Report		✓
I/C Stock Control Reports	Transfer Slips Report		✓
I/C Transactions	Adjustments		✓
<i>I/C Transactions</i>	<i>Assemblies</i>		
I/C Transactions	Internal Usage		✓
I/C Transactions	Post Transactions		✓
I/C Transactions	Receipts		✓
I/C Transactions	Shipments		✓

Category	Screen	2016	2016.1
I/C Transactions	Transaction Listing		✓
I/C Transactions	Transfers		✓

Order Entry web screens

Category	Screen	2016	2016.1
O/E Forms	Credit/Debit Notes		✓
O/E Forms	Invoices		✓
O/E Forms	Order Confirmations		✓
O/E Forms	Picking Slips		✓
O/E Forms	Quotes		✓
O/E Forms	Shipping Labels		✓
O/E Periodic Processing	Clear History		✓
O/E Periodic Processing	Create Batch		✓
O/E Reports	Aged Orders Report		✓
<i>O/E Reports</i>	<i>Email Messages Report</i>		
<i>O/E Reports</i>	<i>G/L Integration Report</i>		
O/E Reports	G/L Transactions Report		✓
O/E Reports	Invoice Action Report		✓
<i>O/E Reports</i>	<i>Optional Fields Report</i>		
<i>O/E Reports</i>	<i>Options Report</i>		

Category	Screen	2016	2016.1
O/E Reports	Order Action Report		✓
<i>O/E Reports</i>	<i>Miscellaneous Charges Report</i>		
O/E Reports	Posting Journals Report		✓
O/E Reports	Sales History Report		✓
O/E Reports	Sales Statistics Report		✓
O/E Reports	Salesperson Commissions Report		✓
<i>O/E Reports</i>	<i>Ship-Via Codes Report</i>		
<i>O/E Reports</i>	<i>Templates Report</i>		
O/E Reports	Transaction List Report		✓
O/E Setup	Email Messages		✓
O/E Setup	G/L Integration		✓
O/E Setup	Miscellaneous Charges		✓
O/E Setup	Optional Fields		✓
O/E Setup	Options		✓
O/E Setup	Ship-Via Codes		✓
O/E Setup	Templates		✓
O/E Statistics and Inquiries	Current Orders Inquiry		✓
O/E Statistics and Inquiries	Pending Shipment Inquiry		✓
O/E Statistics and Inquiries	Sales History		✓
O/E Statistics and Inquiries	Sales Statistics		✓

Category	Screen	2016	2016.1
O/E Statistics and Inquiries	Salesperson Inquiry		✓
O/E Transactions	Copy Orders		✓
O/E Transactions	Credit/Debit Note Entry		✓
<i>O/E Transactions</i>	<i>Invoice Entry</i>		
O/E Transactions	Order Entry		✓
<i>O/E Transactions</i>	<i>Shipment Entry</i>		

Purchase Orders web screens

Category	Screen	2016	2016.1
P/O Analytical Reports	Aged Purchase Orders Report		✓
P/O Analytical Reports	G/L Transactions Report		✓
P/O Analytical Reports	Payables Clearing Audit List Report		✓
P/O Analytical Reports	Posting Journals Report		✓
P/O Analytical Reports	Purchase History Report		✓
P/O Analytical Reports	Purchase Order Action Report		✓
P/O Analytical Reports	Purchase Statistics Report		✓
P/O Analytical Reports	Shippable Backorders Report		✓
P/O Analytical Reports	Transaction List Report		✓
P/O Create Purchase Orders	Create POs from I/C		✓
P/O Create Purchase Orders	Create POs from O/E		✓

Category	Screen	2016	2016.1
P/O Create Purchase Orders	Create POs from Requisitions		✓
P/O Forms	Mailing Labels		✓
P/O Forms	Purchase Orders		✓
P/O Forms	Receiving Slips		✓
P/O Forms	Requisitions		✓
P/O Forms	Returns		✓
P/O Periodic Processing	Clear History		✓
P/O Periodic Processing	Create Batch		✓
P/O Setup	Additional Costs		✓
P/O Setup	Email Messages		✓
P/O Setup	G/L Integration		✓
P/O Setup	Optional Fields		✓
P/O Setup	Options		✓
P/O Setup	Ship-Via Codes		✓
P/O Setup	Templates		✓
P/O Setup	Vendor Contract Costs		✓
<i>P/O Setup Reports</i>	<i>Additional Costs Report</i>		
<i>P/O Setup Reports</i>	<i>Email Messages Report</i>		
<i>P/O Setup Reports</i>	<i>G/L Integration Report</i>		
<i>P/O Setup Reports</i>	<i>Optional Fields Report</i>		

Category	Screen	2016	2016.1
<i>P/O Setup Reports</i>	<i>Options Report</i>		
<i>P/O Setup Reports</i>	<i>Ship-Via Codes Report</i>		
<i>P/O Setup Reports</i>	<i>Templates Report</i>		
P/O Statistics and Inquiries	Pending Receipts Inquiry		✓
P/O Statistics and Inquiries	Purchase History		✓
P/O Statistics and Inquiries	Purchase Statistics		✓
P/O Transactions	Copy Purchase Orders		✓
P/O Transactions	Credit/Debit Note Entry		✓
P/O Transactions	Invoice Entry		✓
P/O Transactions	Purchase Order Entry		✓
P/O Transactions	Receipt Entry		✓
P/O Transactions	Requisition Entry		✓
P/O Transactions	Return Entry		✓

Payment Processing web screens

Category	Screen	2016	2016.1
Setup	Options	✓	✓
Setup	Processing Codes	✓	✓
Transactions	Process Credit Card	✓	✓

Banking and Tax web screens

Banking and Tax modules include Bank Services and Tax Services.

Bank Services web screens

Category	Screen	2016	2016.1
Bank Periodic Processing	Clear History	✓	✓
Bank Periodic Processing	Create G/L Batch	✓	✓
Banks	Banks	✓	✓
<i>Bank Setup</i>	<i>Credit Card Types</i>		
Bank Setup	Distribution Codes	✓	✓
Bank Setup	Distribution Sets	✓	✓
Bank Setup	G/L Integration	✓	✓
Bank Setup	Options	✓	✓
<i>Bank Setup Reports</i>	<i>Banks Report</i>		
<i>Bank Setup Reports</i>	<i>Credit Card Types Report</i>		
<i>Bank Setup Reports</i>	<i>Distribution Codes Report</i>		
<i>Bank Setup Reports</i>	<i>Distribution Sets Report</i>		
<i>Bank Setup Reports</i>	<i>G/L Integration Report</i>		
<i>Bank Setup Reports</i>	<i>Options Report</i>		
Bank Transaction Reports	Bank Entries Posting Journal Report	✓	✓
Bank Transaction Reports	Bank Reconciliation Report	✓	✓
Bank Transaction Reports	Check/Payment Register Report	✓	✓

Category	Screen	2016	2016.1
Bank Transaction Reports	Deposit Register Report	✓	✓
Bank Transaction Reports	Deposits Status Report	✓	✓
Bank Transaction Reports	G/L Transactions Report	✓	✓
Bank Transaction Reports	Reconciliation Posting Journal Report	✓	✓
Bank Transaction Reports	Reconciliation Status Report	✓	✓
Bank Transaction Reports	Transaction Listing Report	✓	✓
Bank Transaction Reports	Transfer Posting Journal Report	✓	✓
Bank Transaction Reports	Withdrawals Status Report	✓	✓
Bank Transactions	Bank Entry	✓	✓
Bank Transactions	Bank Transfers	✓	✓
Bank Transactions	Import OFX Statements	✓	✓
Bank Transactions	Post Entries	✓	✓
Bank Transactions	Post Reconciliation	✓	✓
Bank Transactions	Reconcile OFX Statements	✓	✓
Bank Transactions	Reconcile Statements	✓	✓
Bank Transactions	Reverse Transactions	✓	✓
Bank Transactions	Transaction History Inquiry	✓	✓

Tax Services web screens

Category	Screen	2016	2016.1
Tax Setup	Tax Authorities	✓	✓
Tax Setup	Tax Classes	✓	✓
Tax Setup	Tax Groups	✓	✓
Tax Setup	Tax Rates	✓	✓
<i>Tax Setup Reports</i>	<i>Tax Authorities Report</i>		
<i>Tax Setup Reports</i>	<i>Tax Classes Report</i>		
<i>Tax Setup Reports</i>	<i>Tax Groups Report</i>		
<i>Tax Setup Reports</i>	<i>Tax Rates Report</i>		
<i>Tax Setup Reports</i>	<i>Tax Tracking Report</i>		

Administration web screens

Administration modules include Administrative Services and Common Services.

Administrative Services web screens

Category	Screen	2016	2016.1
<i>Administration</i>	<i>Assign UI Profiles</i>		
<i>Administration</i>	<i>Assign Visual Process Flows</i>		
<i>Administration</i>	<i>Customization Directories</i>		
<i>Administration</i>	<i>Data Activation</i>		
<i>Administration</i>	<i>Database Dump</i>		

Category	Screen	2016	2016.1
<i>Administration</i>	<i>Database Load</i>		
Administration	Customize Navigation Menu	✓	✓
Administration	Data Integrity	✓	✓
Administration	Restart Maintenance	✓	✓
<i>Administration</i>	<i>Security Groups</i>		
<i>Administration</i>	<i>UI Profile Maintenance</i>		
<i>Administration</i>	<i>User Authorizations</i>		
<i>Administration</i>	<i>User Authorizations</i>		
<i>Administration</i>	<i>Users</i>		

Common Services web screens

Category	Screen	2016	2016.1
Company Setup	Company Profile	✓	✓
Company Setup	Fiscal Calendar	✓	✓
Company Setup	Optional Fields	✓	✓
<i>Currency</i>	<i>Currency Codes</i>		
<i>Currency</i>	<i>Currency Rate Types</i>		
<i>Currency</i>	<i>Currency Rates</i>		
<i>Currency</i>	<i>Euro Conversion Rates</i>		
<i>Scheduling</i>	<i>Reminder List</i>		
Scheduling	Schedules		✓





Appendix B: Tips and Tools



Find tips and tools for data entry and other key tasks in Sage 300.

Data Entry Tools

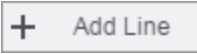

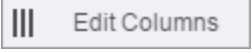


The following data entry tools help you enter and manage information in Sage 300 screens.

Data entry tools

Tool	Name	Description
	Context Menu	<p>The context menu appears next to some data entry fields, and displays a list of available options related to a field.</p> <p>For example, the context menu for the Ship-To Location field may display the following options:</p> <ul style="list-style-type: none">• View Ship-To Location• Edit Ship-To Location
	Date Selector	Click the date selector button to view a calendar and select a date.
	Finder	<p>The Finder appears in some data entry fields, and in some table headings on transaction entry screens. Click it when you want to look up records you can select for a field.</p> <p>When using the Finder, you can specify selection criteria to help you find records. For example, when looking up G/L Accounts, you might specify the following criteria:</p> <p><i>Account Number starts with 21</i></p> <p>You can also click the Edit Columns button to add or remove columns from the table of results that appears in the Finder, or to rearrange the order in which columns appear.</p>
	Go	The Go button appears on screens where you must specify a record (such as a

Tool	Name	Description
	Button	code) before viewing details for the record. After entering the code or name of the record, click this button to view details for the record.
	Help Icon	The Help icon appears next to fields for which help content is available. Point to the icon to see the help.
	New Button	The New button appears next to fields where you can add a new record. For example, where it appears beside a Customer Number field, click this button to add a new customer.

Tools in data entry tables

Tool	Name	Description
	Add Line	Click Add Line to add a new line to a detail entry table.
	Delete Line	Click Delete Line to delete a selected line from a detail entry table.
	Edit Columns	Click Edit Columns to see a list of columns in a detail entry table. You can select the check box for a column to add it; clear the check box to remove it; and drag columns up and down in the list to arrange them in the detail entry table.
	Edit Button	Click the Edit button to open a new screen where you add or edit additional information for a detail line. For example, where this button appears in a Taxes column, click the button to edit tax information for the detail line.
	Page Navigation	Click the Previous and Next buttons to navigate through a list of existing records, or click the First and Last buttons to navigate to

Tool	Name	Description
		the first and last records. You can also enter a page number in the Page field and press Enter to skip to that page.

Buttons

Button	Description
Create New	Click Create New to create a new record. For example, on the A/R Customers screen, click this button to create a new customer record.
Delete	Click Delete to delete the displayed record. If you cannot delete a record, an error message explains why it cannot be deleted.
Print	Click Print to print a report after you have specified settings and criteria for records to include in the report.
Save	Click Save to add a new record you have created, or to save changes you have made to an existing record.

Keyboard Shortcuts

Keyboard shortcuts for data entry

Use the following keyboard shortcuts to speed up data entry.

Key	Action
Enter	Apply changes to the field you are editing.
Tab	Go to the next field.
Pg Up	Go to the top of the window in view.
Pg Dn	Go to the bottom of the window in view.
Shift+Tab	Go to the previous field.

Keyboard shortcuts for detail tables

Use the following keyboard shortcuts to navigate and enter information in detail tables.

Key	Action
Enter	Apply changes to the field you are editing.
Left or Right Arrow	Scroll left or right in the table.
Shift+Tab	Go to the previous field.
Tab	Go to the next field.
Type page number and press Enter	In detail tables that display multiple pages of information, go to a specific page.
Up or Down Arrow	Go up or down one row.

Working with Detail Entry Tables

Transaction entry screens in Sage 300 include a detail entry table that show transaction details in tabular format.

In most cases, you can enter all details for a transaction using the table.

- To add a detail, click the **Add Line** button, and then enter information for the detail in the table.
- To edit a detail, select the line you want to edit, and then make your changes.
- To delete a detail, select the line you want to delete, and then click **Delete Line**.

Tips:

- To show, hide, and arrange columns in the table, click the **Edit Columns** button.
- To resize a column, drag the edge of the column header.
- If there are more columns than can be displayed at one time, you can use the horizontal scroll bar at the bottom of a table to view the additional columns.