



Sage 300 2017

Upgrade Guide

July 2016

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Last updated: March 1, 2016

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Overview

This Upgrade Guide provides instructions for upgrading earlier versions of System Manager and applications to Sage 300 2017. You should review the following sections carefully to ensure that the upgrade proceeds smoothly:

- Minimum System Requirements
- Version Compatibility
- Upgrading from Version 5.5 or Earlier
- Applying for Activation Codes
- Before Upgrading to Sage 300 2017
- Upgrade Steps
- After Activating
- Configuring the Sage 300 Web Screens or Portal

You should refer to the Sage 300 2017 Release Notes for supplementary information and information that was not available when this *Upgrade Guide* was published.

For information on the changes and new features in this version, see *What's New in Sage 300 2017*, which is available from the [Sage 300 ERP\Docs\64A](#) program folder after you install Sage 300.

If you will be using Sage CRM with Sage 300, refer to the *Sage CRM Integration Upgrade Guide* for information about upgrading and a list of changes to that program. For system requirements and instructions on integrating Sage CRM with Sage 300, see the *Sage CRM Integration Guide*.

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

System Requirements

The information in this section was current when we released Sage 300 2017. If you do not find the information you need, see the *Compatibility Guide*:

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

Server and Workstation Requirements

For a complete and up-to-date list of hardware and operating system requirements for workstations and servers, see the *Compatibility Guide*:

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

Creating DSNs for Sage 300 Data on 64-Bit Windows

On a 64-bit Windows system, the default ODBC Data Source Administrator (available from the Administrative Tools menu) lets you configure only 64-bit data sources.

However, Sage 300 is a 32-bit application. To create data sources for Sage 300, you need to browse for the 32-bit version of the ODBC Administrator. You can find the 32-bit ODBC Administrator in the following location:

<C:\WINDOWS\SysWOW64\odbcad32.exe>

Optional System Requirements

Web Deployment of the Desktop Client

This version does not support DCOM remoting for Web Deployment.

Before setting up Web Deployment, you must enable 32-bit application support in Internet Information Services (IIS). Refer to the following Microsoft article on the steps to do this:

<http://www.iis.net/configreference/system.applicationhost/applicationpools/applicationpooldefaults>

Under Windows 7, you cannot print reports for web deployed Sage 300. However, you can still print reports from the Sage 300 desktop.

If you are using Web Deployment with .NET Remoting, the G/L Statement Designer can fail with an “Initializing FR Error (30): Fail in starting Statement Designer” error when you try to run the Statement Designer from a browser client.

This problem occurs because Microsoft Excel is loading an incorrect version of the Microsoft .NET Framework. You should install the Update for Office 2003 as outlined in the Microsoft Knowledge Base article KB907417. The update must be installed on the browser client machine.

Visual Basic for Applications (VBA)

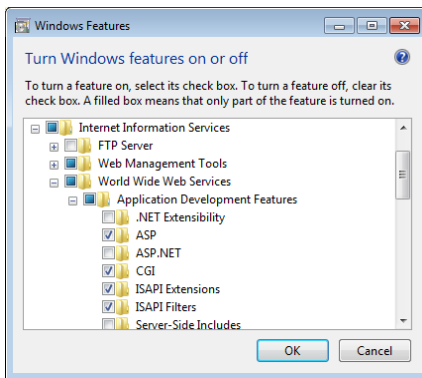
System Manager 2017 (internally known as version 6.4A) installs and uses Microsoft VBA 6.4. This version is compatible with macros created using prior versions of VBA.

Sage 300 Web Screens and Portal

Before you install the Sage 300 web screens or Portal:

- Note that, on any single server, you can install the web screens or the Portal, but not both. To install the web screens and the Portal, you must have two servers.
- Ensure that Microsoft’s Internet Information Services (IIS) is installed on the server that will host the Sage 300 web screens or Portal.
- If IIS is not installed, you must install it before you attempt to install the Sage 300 web screens or Portal. For detailed instructions, see “Step 6: Install and Configure Internet Information Services.”

- For Windows 7 and Windows 8, ensure that ASP, CGI, ISAPI Extensions, and ISAPI Filters are selected Windows features (under World Wide Web Services' Application Development Features), as shown here:



Important! The Sage 300 web screens and Portal support only Microsoft SQL Server database formats. If you are upgrading from Sage ERP Accpac 6.0, you must re-create your portal database using Microsoft SQL Server. For detailed instructions, refer to the *Sage 300 Installation and Administration Guide*.

Recommended Setup on Windows

You must install Sage 300 outside the default path ([C:\Program Files\Sage\Sage 300 ERP](#)).

If you install to the default path, you may have problems with security because Windows does not allow more than one user to open Sage 300.

We recommend changing the Program and Shared Data directories to locations other than the default. For example:

- For Programs, install to: [C:\Sage 300](#).
- For Shared Data, install to: [C:\Sage 300 Data](#).

Version Compatibility

You must upgrade all Sage 300 programs to version 2017 (internally known as 6.4A) at the same time. Sage 300 2017 programs do not work with programs from earlier versions.

In addition, note that:

- You must upgrade all programs that you use with Sage 300 to compatible versions.
- If you are using Sage CRM with Sage 300, see the *Sage CRM Integration Upgrade Guide* for important information about version compatibility.
- Sage 300 Payroll 2017 (7.3A) is compatible with Sage 300 2017. However, it must be installed separately.

Note: Sage Payroll requires Bank Services, Tax Services, and G/L Subledger Services.

Upgrading from Version 5.5, or Earlier

If you are using Sage ERP Accpac version 5.5, or earlier versions, note that you cannot upgrade your data directly to Sage 300 2017.

Warning! You cannot use the 2017 version of System Manager to upgrade Sage ERP Accpac programs from version 5.5, or earlier.
Also, you cannot use version 5.6 of System Manager to upgrade Sage ERP Accpac programs from version 5.2, or earlier.
Attempting to do so will cause your system to crash, and will corrupt your data.

If you are using Sage ERP Accpac version 5.5, 5.4, or 5.3, you must update your data to version 5.6 *before you install the 2017 version of System Manager*. See the *Upgrade Guide* for version 5.6 for information about upgrading to that version.

If you are using Sage ERP Accpac version 5.2, or earlier versions, you must upgrade your database to an intermediate version (version 5.3, 5.4, or 5.5) *before you install System Manager version 5.6*. See the *Upgrade Guide* for the intermediate version for information about upgrading to that version.

Alerts and Warnings

Alert when Running Help

If you run Windows with your browser security set to High, you may receive the following message about Web page security when you try to open Sage 300 help:



To accept Sage 300 help as a trusted site, click the **Add** button.

Alert when Upgrading Sage 300 Intelligence Reporting

If you were using Sage Accpac Intelligence (SAI) with a previous version of Sage ERP Accpac, do not change the company database ID.

If you change the database ID, and then upgrade to Sage 300 2017 Intelligence Reporting, you may lose all the security roles set up for Intelligence Reporting in the previous version.

Alert when Migrating from Pervasive to Microsoft SQL

If you are migrating your database from Pervasive to Microsoft SQL, and your database contains Inventory Control items that use units of measure with the same name but with mixed cases (for example, both "EACH" and "Each," or another combination), we recommend that you choose a binary collation method for your SQL database. If you try to load data with mixed cases and you use a non-binary collation method, Database Load will fail.

Alternatively, you can repair your data, standardizing on one unit of measure, before using Database Load.

Applying for Activation Codes

You need activation codes to use Sage 300 products, including upgrades. However, you can run Sage 300 for up to 30 days while you await your activation codes.

You can obtain activation codes from the Sage Customer or Partner Portal.

If you are a Sage customer:

1. Log in to your account at <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

If you don't have an account, use the self-registration tool on the Customer Portal login page to create one.

2. On the Support menu, click **Self Service**.
3. Click the **My Products** tab.
4. Follow the instructions on the My Products tab to display and print the Details Sheet.

If you need assistance with the Customer Portal, email Customer.Portal@sage.com, or call 1-877-828-6372.

If you are a Sage partner:

1. Log in to your account at <https://partners.sagenorthamerica.com/irj/portal>.

If you don't have an account, contact the portal administrator at your company, or contact Sage.

2. Click **Customers > Details Sheet**.
3. Click **Show Advanced Search**.
4. Enter an account ID, and then click **Go**.
5. On the Details Sheet, click the **Products Details** tab to view the customer's activation codes.

If you need assistance with the Partner Portal, email Partner.Portal@sage.com, or call 1-877-828-6372.

Before Upgrading to Sage 300 2017

Perform the following steps, in order, before upgrading to Sage 300 2017. If you don't take these steps, you will not be able to activate your software.

For instructions on steps to take after upgrading, see "After Activating Applications" in this guide.

Step 1: Make Sure You Have 2017 Versions of All Programs

Make sure you have version 2017, or compatible versions, of all Sage 300 programs and other programs you use with Sage 300.

Warning! You must upgrade all Sage 300 programs at the same time.

Step 2: Run Day End Processing (Optional)

Run Day End Processing in Inventory Control or, if you have a standalone Purchase Orders system, run Day End Processing in Purchase Orders.

Step 3: Post Batches in Accounts Receivable and Accounts Payable (Optional)

You must post all open batches in Accounts Receivable and in Accounts Payable.

Step 4: Save Customized Reports, Macros, and Other Customizations

Move customized reports to another folder, or they will be overwritten during the installation process.

For example, if you created customized financial reports in General Ledger, copy them from their current location (for example, [GL63A\ENG](#)) to another location, and then copy them to [GL64A\ENG](#) after installing the upgrade.

Also, save macros and any other customizations to a new folder.

Note that macros work with the Sage 300 desktop program, and are not available in the Sage 300 Portal.

Step 5: Print the Account Group Report (Optional)

In version 6.0, we modified the standard set of account groups to support General Ledger "snapshots" in a new web Portal.

If you used account groups in version 5.6 and you want to use these snapshots in Sage 300 2017, you may need to reassign some of your existing accounts to new account groups.

Print the Account Group Report to use as a reference when reassigning accounts, after installing and activating Sage 300 2017.

Step 6: Install and Configure Internet Information Services

The Sage 300 web screens and Portal require Microsoft Internet Information Services (IIS). If you plan to use the web screens or portal, ensure that IIS is installed on the portal server before you install Sage 300.

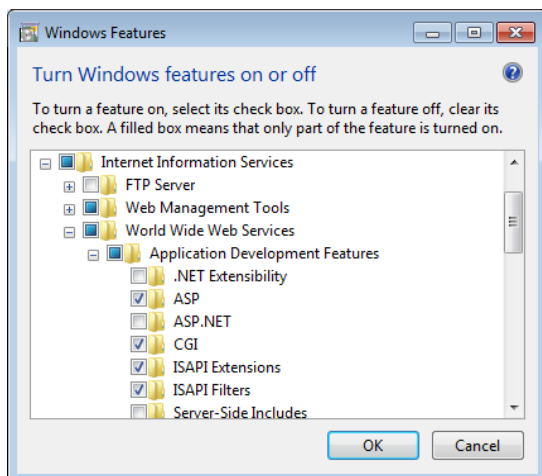
You install and configure IIS a little differently, depending on your version of Windows. If you need to install IIS, follow the instructions for your computer's operating system.

IIS for Windows 7

To install and configure IIS for Windows 7:

1. In Windows' Control Panel, click **Programs and Features**.
2. Click **Turn Windows Features On or Off**.
3. In the Windows Features form, expand **Internet Information Services > World Wide Web Services > Application Development Features**.
4. Under Application Development Features, select the following options:
 - ASP
 - CGI
 - ISAPI Extensions
 - ISAPI Filters

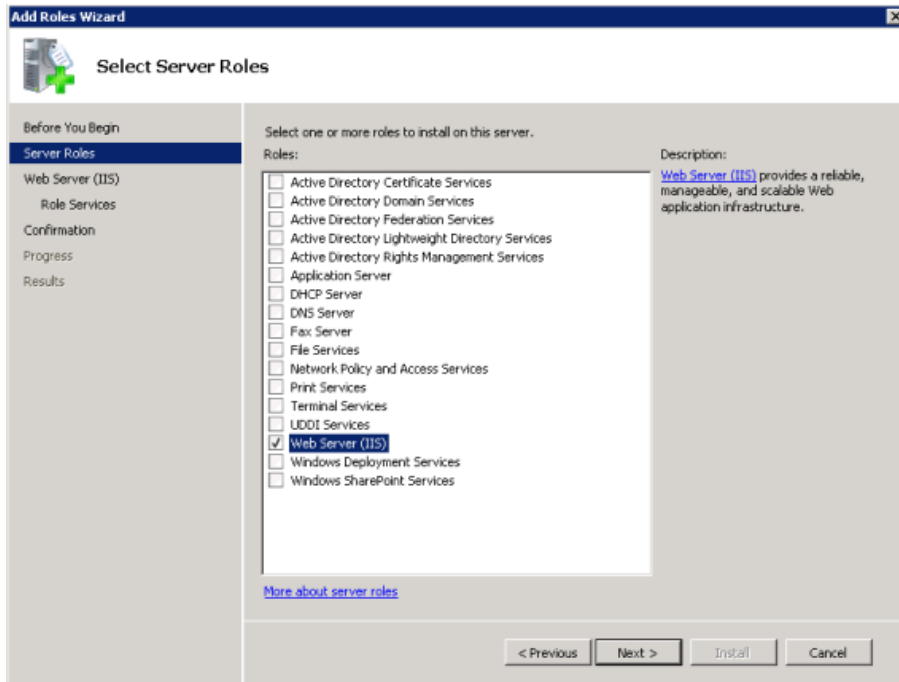
When selected for Windows 7, these options appear, as follows:



IIS for Windows 2008 and Windows 2012

To install and configure IIS for Windows 2008 and Windows 2012:

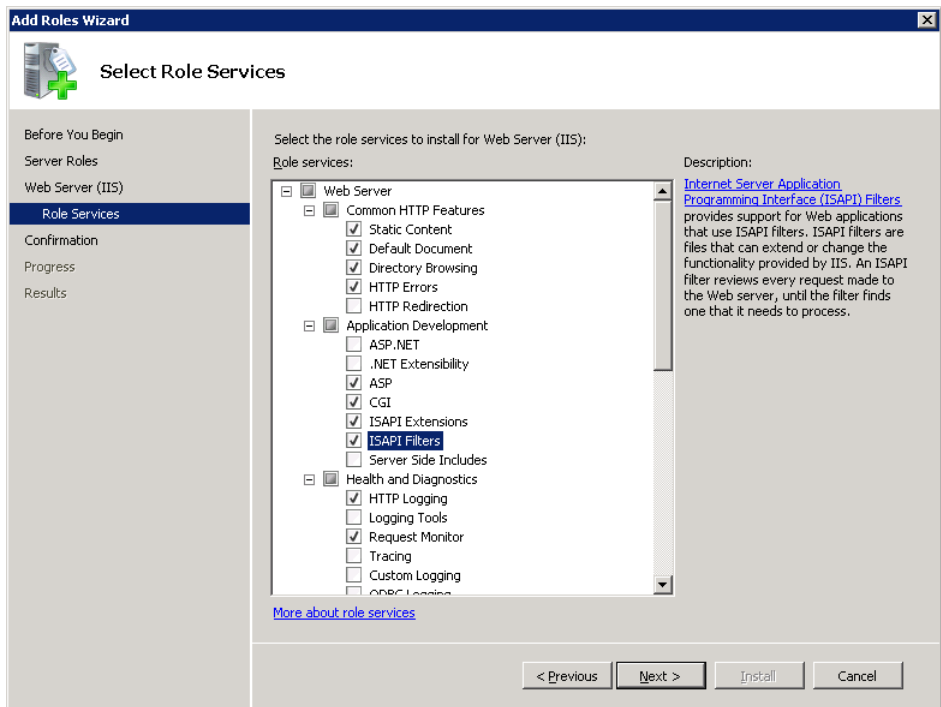
1. From Windows' Control Panel, click **Administrative Tools > Server Manager**.
2. In the Server Manager, under **Roles**, click **Add Roles**.
3. On the Select Server Roles page, click **Web Server (IIS)**, as shown in the following screen:



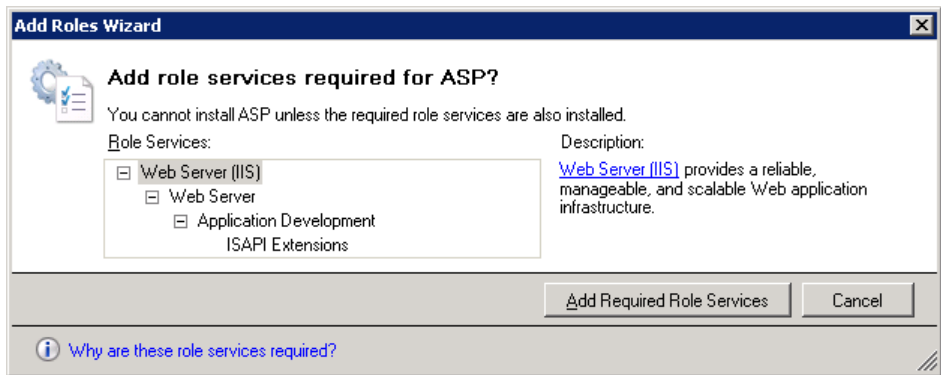
4. Click **Next**, and then select the following Role Services:

- ASP
- CGI
- ISAPI Extensions
- ISAPI Filters.

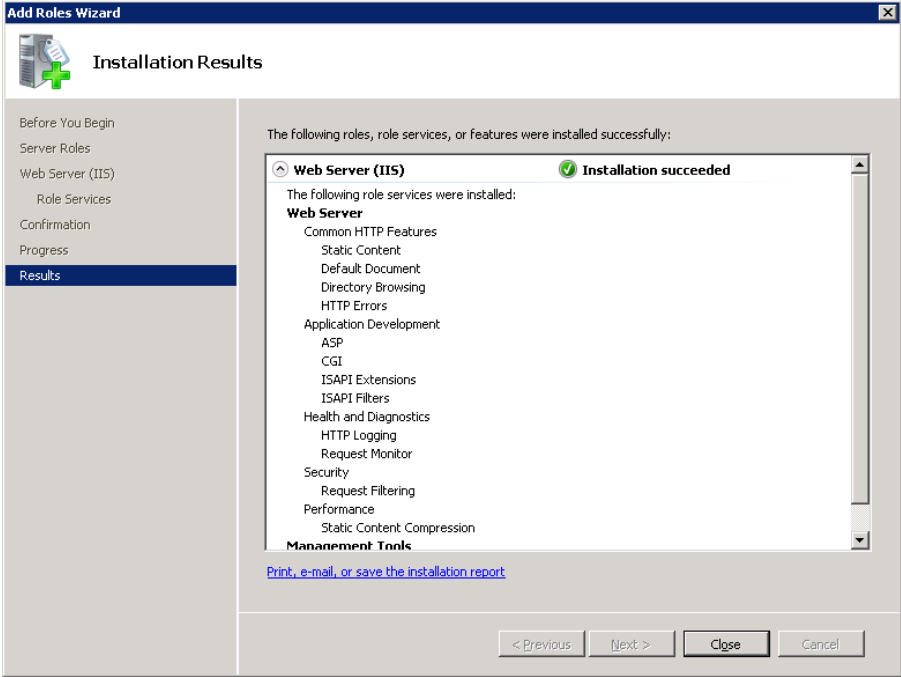
The Select Role Services page should now appear as follows:



- 5. Click **Next**.
- 6. If the following prompt to install required services appears, click **Add Required Role Services**.



The Results page should appear, as follows:



Upgrading to Sage 300 2017

Before you proceed with the steps in this section, we strongly recommend that you:

- Check data integrity in your previous version, and correct any errors.
- Back up your data.

Important! If you are activating a new Sage 300c and/or Sage Payroll subscription, back up all existing Sage 300 program files and data, **including all installed Payroll and other modules**, before installing new programs and entering license information.

If your subscription is terminated, expires, or ends for any reason, you can restore your Sage 300 program files from the backup and continue to use that version of the software.

- Uninstall System Manager before installing the latest version to ensure a clean installation of the new version.

Step 1: Install Sage 300 Programs

After you have performed the steps described in the previous section, you can install Sage 300 System Manager, System Manager Components, Sage 300 applications, the Sage 300 web screens or Portal, and any desired language packs.

You install Sage 300 components in one continuous process, consisting of two phases:

1. Installing Sage 300.
2. Entering license information.

Installing the Programs

1. Insert the Sage 300 installation DVD into your DVD drive.
If the installation screen does not appear automatically, go to the DVD's root directory (for example, `d:\`), and run [LAUNCH.EXE](#).
2. On the installation screen, click **Sage 300**.
3. On the Sage 300 installation screen, click **Sage 300**.
4. On the Welcome screen, click **Next**.
5. Click the option to accept the license agreement, and then click **Next**.
6. Select the geographical region where you are installing the software, and then click **Next**.
7. For the client information, enter your 7-digit or 10-digit client ID and the company name to use for registration, and then click **Next**.

8. To provide additional information for registration, enter the names of the company contact, software dealer, and certified consultant, and then click **Next**.
9. Select the edition of Sage 300 you require, and then click **Next**.
10. Specify the names and locations of your program and data folders, and then click **Next**.

Note: Be sure to install Sage 300 outside the default path (for example, [C:\Sage\Sage 300](#)). See the section “Recommended Setup on Windows,” for more information. Also, to use web screens, you must specify the full path for the shared data folder (do not specify a mapped drive) and a local path for the programs folder (do not specify a mapped drive or a UNC path).

11. On the Select Features screen, select features and applications to install, and then click **Next**.

When installing the web screens or Portal, note that:

- Installing the web screens or Portal installs components required to support these features.
- Before installing the web screens or portal, you must have installed IIS, as described in “Step 6: Install and Configure Internet Information Services,” in the previous section.
- On any single server, you can install the web screens or Portal, but not both. To install the web screens and the Portal, you must have two servers.

Keep in mind that most of the applications require you to install others. All of the applications require core System Manager files.

The following list shows any additional requirements in parentheses for each application:

- Bank Services (Tax Services, G/L Subledger Services)
- General Ledger (Sage 300 Intelligence Reporting)
- Accounts Payable (Bank Services, Tax Services, G/L Subledger Services)
- Accounts Receivable (Bank Services, Tax Services, G/L Subledger Services)
- Inventory Control (G/L Subledger Services)
- Order Entry (Accounts Receivable, Inventory Control, Bank Services, Tax Services, G/L Subledger Services)
- Payment Processing (Accounts Receivable, G/L Subledger Services, Bank Services, Tax Services, Order Entry, Sage Exchange)
- Purchase Orders (Accounts Payable, Bank Services, Tax Services, G/L Subledger Services)
- Project and Job Costing (Accounts Payable, Accounts Receivable, Bank Services, Tax Services, G/L Subledger Services)

12. On the next screen, in the **Program Folder** field, type the location on the Start menu where you want Sage 300 to appear, and then click **Next**.

13. Click **Install**.

Once installation has finished, the License Manager appears. Follow the instructions in the next section to enter license information.

Entering License Information

The next steps continue from the preceding section, “Installing the Programs.”

The License Information tab is completed with information you entered during installation.

The screenshot shows the 'Sage 300 ERP License Manager' window. It has three tabs: 'License Information', 'Licenses', and 'Users'. The 'License Information' tab is selected. It contains several input fields: 'Client ID' with the value '0000000000' and a 'Change' button; 'Company' with the value 'XYZ Company' and a 'Change' button; 'Licensed To' with the value 'XYZ Company'; 'Dealer' (empty); and 'C.C.' (empty). A 'Close' button is located at the bottom right of the dialog.

Note: Do not change the company name unless you need to change the business entity to which the programs are registered. If you change the company name, the licenses will appear Unauthorized until you apply for and enter new activation codes.

1. If you have activation codes for your Sage 300 programs, click the **Licenses** tab, and then, for each Sage 300 program:
 - a. Double-click in the **Serial Number** column, and then type the serial number.
 - b. Double-click in the **Activation Code** column, and then type the activation code.
 - c. For subscription licenses, double-click in the **Expiry Date** column, and then enter the expiry date.

If you don't yet have activation codes, you can use the 30-day temporary licenses created during installation, and record the permanent code later.

2. If you installed Sage 300 Intelligence Reporting Analysis or Sage 300 Intelligence Reporting Connector, enter their activation codes on the Licenses tab.

Note: The Analysis and Connector programs are not available with a 30 day license. You must have a permanent license to use them.

3. Click the Users tab, and then, for each LanPak you have installed, double-click in the associated column and enter, in order:
 - a. **License Type.** Select **LanPak**. (Do not select a database-specific LanPak.)
 - b. **Count.** Type the number of users who require Sage 300 access for this installation.
 - c. **Serial Number** (for the LanPak).
 - d. **Activation Code** (supplied by Sage).

If no LanPaks are listed on the tab, click in the blank space to create a new line for a temporary license, and then enter the license type, followed by the count.

Important! You must record at least one LanPak license to use Sage 300.

For Sage 300 Intelligence Reporting, one Report Manager license for one user is free with Sage 300. If you have additional licenses for Report Manager and Report Viewer, enter their activation codes in the Activation Code column.

4. Click **Close**.
5. Click **Finish** to close the Installation wizard.

Step 2: Install Product Updates

Before activating, check for available product updates for version 2017, and install any product updates you have not already installed.

Important! To avoid possible data corruption issues, you must install all released product updates for version 2017 before activating your Sage 300 applications.

Note: After installing a product update, if you use web screens, you must configure the Portal database again. For detailed instructions, see “Configuring the Sage 300 Web Screens or Portal.”

Step 3: Activate Your Data for Version 2017 Applications

You must use the desktop program to activate Sage 300 applications, as follows:

1. In the Administrative Services folder, double-click **Data Activation**.
2. When asked whether you are ready to proceed with activation, click **Yes**.
3. In the Data Activation form that appears, select the check box for each application for which you want to activate data.

Note: If you use Sage 300 Payroll, you require Sage 300 2017 Payroll (7.3A). If you have been using an earlier version, you will have to install the current version and reactivate your payroll data.

The activation program automatically selects any applications that must be activated first, and then checks your data to ensure that it can activate them.

Most Sage 300 applications are interdependent. If you clear the selection for an application that others require, the activation program also clears the selection for the dependent applications. For example, if you clear the selection for Accounts Payable, but Purchase Orders and Project and Job Costing are selected, the program also clears the selections for Purchase Orders and Project and Job Costing. (See “Step 1: Install Sage 300 Programs” for information about dependencies.)

Note: Sage 300 Options products are not part of the multi application data activation. If you select Sales Analysis, Ops Inquiry, or a number change program, you are prompted to activate that program immediately.

4. If you receive a message saying that you cannot activate an application at this time:
 - a. Close the Data Activation form.
 - b. Correct the problems described in the error message.
 - c. Reopen the Data Activation form, and continue the process.
5. Once you have finished selecting applications and entering required information, click the **Activate** button.

After Activating Applications

After activating applications, you should check data integrity for each application to ensure that the upgraded data contains no errors.

In addition, you must perform the tasks described in the next sections.

Bank Services Update Notes

If the data integrity check found errors for Bank Services, you must refresh transactions for the affected banks, as follows:

1. Open the Reconcile Statements form.
2. For each affected bank:
 - a. In the **Bank Code** field, type the bank code, or use the Finder or the navigation buttons to display it.
 - b. Click **Calculate**.
3. Check data integrity for Bank Services again.

General Ledger Update Notes

Preparing Your Accounts for Use with Data Snapshots

You can view graphic “snapshots” of your accounting data in a web Portal.

The Income Statement and Balance Sheet snapshots provide instant pictures of your company’s current financial health. They can help you spot operational problems and guide your financial decisions.

These snapshots draw data from a set of group categories that are linked to your general ledger accounts through account groups. Group categories, introduced in Sage ERP Accpac 6.0, organize your accounting information especially for presentation in the Portal.

Important! To use the snapshots, you must associate each General Ledger account with an appropriate group category before you configure the Income Statement and Balance Sheet snapshots. Otherwise, the snapshots will not represent your data accurately.

If you have used account groups in version 5.6, note that in version 6.0, we modified the standard account groups that come with Sage 300. Therefore, you may need to reassign some of your existing accounts to new account groups, and assign the groups to the new group categories.

If you have not used account groups previously, note that the Account Groups form appears only if the **Use Account Groups** option is selected in the G/L Options form.

If you used account groups in Sage ERP Accpac versions 5.6 or 6.0 and you plan to use the general ledger snapshots, you must first:

1. Ensure that all account groups are assigned to an appropriate category from the new set of group categories.

You assign group categories using the Account Groups setup form.

2. Ensure that all general ledger accounts are assigned to appropriate account groups.

To assign account groups to group categories, you use the Account Groups form (available in the G/L Setup folder).

Note the following points:

- If you do not want to use general ledger data snapshots, you do not need to remap any accounts to new account groups and categories.
- Financial Reporter comes with a new set of sample statements that use the new account groups. If you want to use the new sample statements, you must ensure that your accounts use the new account groups.
- If you reassign accounts to new account groups, remember to adjust any custom reports that use account groups.
- If you don't want to use the new set of sample financial statements, you can still use the statements that shipped with earlier versions.

The following chart shows the standard account groups and categories that support the snapshots. Use these charts as a reference when remapping existing accounts to the new account groups.

Sage 300 Standard Account Groups and Categories

Code	Group Description	Group Category
01	Cash and Cash Equivalents	Cash and Cash Equivalents
02	Accounts Receivable	Accounts Receivable
03	Inventory	Inventory
04	Other Current Assets	Other Current Assets
05	Fixed Assets	Fixed Assets
06	Accumulated Depreciation	Accumulated Depreciation
07	Other Assets	Other Assets
08	Accounts Payable	Accounts Payable

Code	Group Description	Group Category
09	Provision for Income Taxes	Other Current Liabilities
10	Other Current Liabilities	Other Current Liabilities
11	Long Term Liabilities	Long Term Liabilities
12	Dividends	Other Liabilities
13	Share Capital	Share Capital
14	Shareholders' Equity	Shareholders' Equity
15	Revenue	Revenue
16	Opening Inventory	Cost of Sales
17	Purchases	Cost of Sales
18	Closing Inventory	Cost of Sales
19	Cost of Sales	Cost of Sales
20	Other Revenue	Other Revenue
21	Fixed Charges	Other Expenses
22	Other Expenses	Other Expenses
23	Depreciation Expense	Depreciation Expense
24	Other	Gains/Losses
25	Interest Expense	Interest Expense
26	Income Taxes	Income Taxes
—	—	—

System Manager Update Notes

To let users open Sage 300 using their Windows signon ID, change the authentication method for each user in the Users form.

See the System Manager help for instructions on adding users and setting up security.

Sage 300 Intelligence Reporting Update Notes

Running Intelligence Reporting for the First Time

The first time you run Sage 300 Intelligence Reporting, you must log in as the Windows administrator.

A user with Windows administrator privileges must register the ActiveX component, [BICore.exe](#), that Intelligence Reporting requires. To register this component, open any Sage 300 Intelligence Reporting form. Once the component is registered, other types of users can open these forms.

If you use workstation setup, you must also run Sage 300 Intelligence Reporting workstation setup (located in [BX64A\WSSSetup](#)) on every workstation where you will view and use Intelligence Reporting screens.

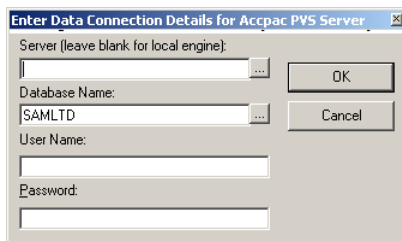
Restoring Customized Reports and Settings from Your Previous Version

If you used Intelligence Reporting (formerly known as Sage Accpac Intelligence) with Sage ERP Accpac 5.6 or 6.0, restore your customized reports and settings by copying the [BXDATA](#) folder (backed up before activation) to the Sage 300 program folder.

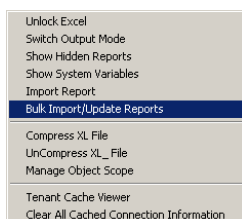
Then, use the Bulk Import feature to import new reports from newer versions of Sage 300 Intelligence Reporting or from existing reports. Importing the new reports in this way ensures that your existing reports and settings are not deleted.

To import new reports:

1. Open Report Manager.



2. Enter the required connection information for your database, and then click **OK**.
3. In the Object window, do one of the following:
 - Click the **Home** icon. Then, on the Tools menu, click **Bulk Import/Update Reports**.
 - Right-click the **Home** icon, then click **Import/Update Reports** on the menu that appears.



4. On the Bulk Import/Update Reports form that appears, click **Yes** to import the new reports.
5. When the new reports are imported, they will co-exist with the backed-up ([BXDATA](#)) reports from the previous version.

Configuring the Sage 300 Web Screens or Portal

Before you can use the Sage 300 web screens or Portal, you need to create a portal database using Microsoft SQL software. The portal database stores files used by the Sage 300 web screens and Portal. For the Portal, these include user preferences and passwords, snapshot configurations, and other files that determine how the portal looks and functions.

Note: You must use Microsoft SQL Server (full or Express edition) to create your portal database.

If you are upgrading from Sage ERP Accpac 6.0:

- If you used Pervasive PSQL to create your portal database, you must recreate your portal database in Microsoft SQL Server. To create your portal database, follow the instructions in the *Sage 300 Installation and Administration Guide*.
- If you used Microsoft SQL Server to create your portal database, your database will be upgraded automatically for use with the version 2017 portal, and all existing settings will be preserved.

Normally, you create the portal database on the same server as your Sage 300 data. The portal database is shared by all companies in a Sage 300 installation, so you configure only one Sage 300 Portal.

After creating the database, configure the portal to connect it to the database.

Note: If you use SQL Server Express, you will need to configure a TCP/IP connection manually as described in the section “Configuring a Microsoft SQL Server Express Database.”

To configure the portal database:

1. From Windows’ Start menu, select **All Programs > Sage 300 > Database Setup**.
2. Click the **Portal** button to open the Configure Portal form.
3. Enter the following information on the Configure Portal form:
 - **Database Format (read-only)**. The format is set to Microsoft SQL Server because it is the only database engine you can use to create your portal database.
 - **Server Machine**. The default portal server that appears is the name of the machine on which you installed Sage 300. If you created your portal database on a different machine, enter the name of that machine instead.

- **Server Port.** Enter the TCP/IP port number specified in your database software for your portal database. The server port must be the HTTP port for SQL Server. (The default port number is 1433.)
- **Database Name.** Enter the name specified for the portal database in your database software.
- **User Name and Password.** Enter the user name and password specified for your database administrator in your database software. (They are not the credentials for the Sage 300 ADMIN User.)

Note: For a Microsoft SQL Database, you must supply credentials for SQL authentication. The portal does not support Windows authentication.

4. Click **OK**.

The program saves this configuration to a file named [dbConnection.xml](#), which is located in the following folder under Program Files:

[Common Files\Sage\Sage 300 ERP\Tomcat\portal\swtServices.](#)

Configuring a Microsoft SQL Server Express Database

The following instructions apply only to a Microsoft SQL Server Express portal database.

TCP/IP connections are not enabled automatically in SQL Server Express. Because the portal requires a TCP/IP connection, you must set one up manually, as follows:

1. Open the SQL Server Configuration Manager.
2. Under the SQL Server Network Configuration tree, click **Protocols For SQLEXPRESS**.
3. For the TCP/IP protocol, select **Enabled**. (The default setting is **Disabled**.)
4. Right-click the TCP/IP protocol, click **Properties**, and then select the **IP Addresses tab**.
5. On the TCP/IP Properties screen, in the IPAll Section:
 - a. Clear the **TCP Dynamic Ports** field.
 - b. Set the **TCP Port** to 1433.
6. Restart the SQL Server.

Starting the Sage 300 Web Screens or Portal

Once you have activated the company data for version 2017 programs and configured the Sage 300 web screens or Portal as described in this guide, the web screens or Portal are ready to use.

For troubleshooting tips, see Chapter 5 in the *Sage 300 Installation and Administration Guide*.

To open web screens in a browser:

1. Visit <http://servername/sage300>, where [servername](#) is the server name or IP address of the server where Sage 300 is installed.
2. Enter your username and password.
3. Select a company.
4. Click **Sign In**.

To open the Sage 300 Portal:

On the Windows Start menu, click **All Programs > Sage 300 > Portal**.

What's New in Sage 300 2017

For detailed information about changes and new features in this version, see *What's New in Sage 300 2017*, available on the installation DVD and from the [Sage 300 ERP\Docs\64A](#) program folder on the computer where you installed Sage 300.