Sage 300c 2018

Web screens getting started guide

May 2018

Contents

Discover Sage 300c web screens

Sage 300c 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 300c web screens.

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

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 300c web screens.

General questions

What's the difference between Sage 300c 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 300c 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 300c 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 Sage 300c web screens" (page 34).

Are the web screens identical to the desktop screens?

While most of the web 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.

Can I use web screens in multiple browser windows or tabs at the same time?

Each user can sign in to web screens in only one browser window or tab at a time. If you want to use web screens in multiple browser windows or tabs, as a workaround, you can sign in using different browsers, such as Chrome and Firefox.

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 Intelligence Reporting Cloud is available in web screens. For more information, see "About Sage Intelligence Reporting Cloud" (page 20).

What security authorizations do users need to use Sage Intelligence Reporting Cloud?

To use Sage Intelligence Reporting Cloud, users must be assigned to a security group with **Financial Reporter** security authorization for Sage 300 General Ledger and **Sage 300 Web API** security authorization for Sage 300 Common Services.

Also, for the ADMIN user you must customize two Sage 300 program files. For more information, see Sage Knowledgebase article 84722.

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. You can also use the Reports list to create a list of links to the custom reports you and your team use most often.

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. You can also use the Reports list to create a list of links to the custom reports you and your team use most often.

What other customizations are supported?

All existing customizations are supported in desktop screens, but not in web screens.

Most web screens can be customized by administrators using the Customize menu option. Partners and ISVs can use the Software Development Kit (SDK) and Web Application Program Interface (API) to create custom services and features for Sage 300c web screens.

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, as well as a Web Application Program Interface (API).

To download documentation and get started, see Sage Knowledgebase article 75211.

For more information about Sage Development Partner Programs, visit www.sage.com/us/partners.

Getting started with Sage 300c web screens

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

Installing Sage 300c web screens

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

> **Important!** When using Sage 300c 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 300c web screens. For complete installation and setup instructions, see the *Sage 300 Installation and Administration Guide*.

Before installing Sage 300c:

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 300c web screens. (*Sage 300 Installation and Administration Guide* Chapter 3)

When you install Sage 300c:

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 300c:

1. Configure the Portal database, which is used by both the Sage 300 Portal and Sage 300c 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 300c 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 300c web screens.

Signing in to Sage 300c in a browser

To use Sage 300c web screens, you sign in to Sage 300c 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 300c 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 300c 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.

   Your system may be set up to show only companies for which you have security rights.

   If your system is set up this way:

- Pressing Tab after entering your password updates the list of companies that are available. (Initially, the list of companies includes only companies that do not use security. After entering your password and pressing Tab, the list also includes companies that use security that you are authorized to open.)

- If you enter your password but do not press Tab, and instead immediately press Enter or click **Sign In**, the system tries to open the last company that was opened, which may not be the same one displayed in the company list. For example:

  Suppose you have two companies: Company1 does not use security, Company2 uses security (and you have security rights for it). The last company that was opened is Company2. Before entering your password and pressing Tab, Company2 cannot be displayed, so Company1 is. You enter your password and click **Sign In**. Even though Company1 was displayed, Company2 opens.

3. Select a company.

4. Click **Sign In**.

Finding and learning about features

Sage 300c 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 the session date, the Account menu, your company name, the Help menu, and the Tools icon.
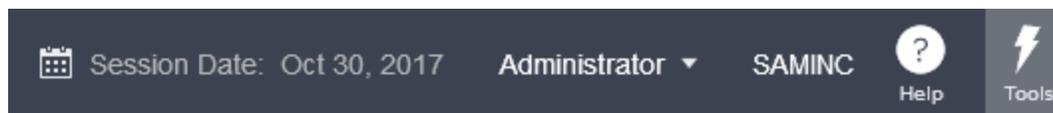
You use the Account menu to sign out of Sage 300c, and to navigate to any available connected services.

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.

The Tools icon lets you show or hide the web toolbar.

Navigation menu

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

The navigation menu appears at the left side of your browser window. By default, the menu is displayed in a collapsed mode that shows small icons for each module. When you point to the menu, it automatically expands to show the full names of modules. You can permanently expand the menu by clicking **Expand Menu** at the bottom of the menu.
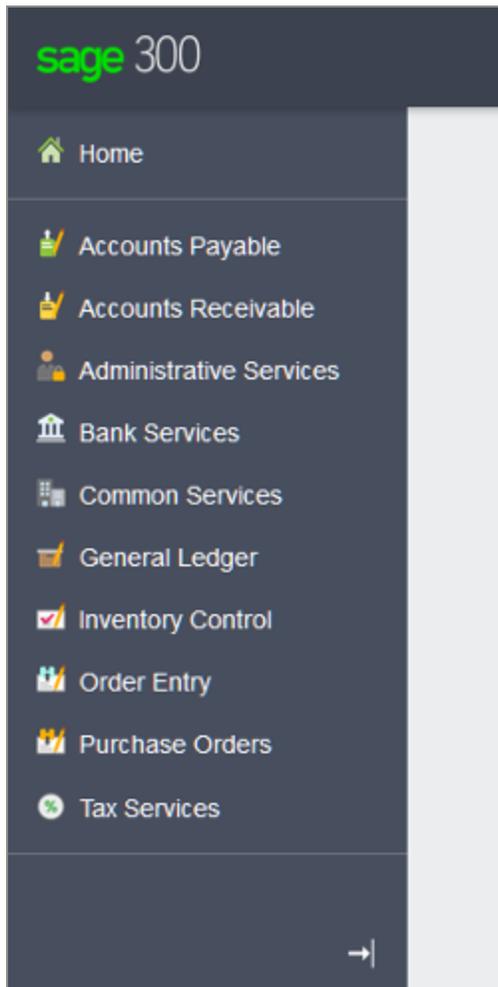
Features differ by module, but are usually organized into some or all of the following categories:

- **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 at the top of the screen.

For example, when you open a G/L transaction window, quick links to other G/L transaction windows appear.
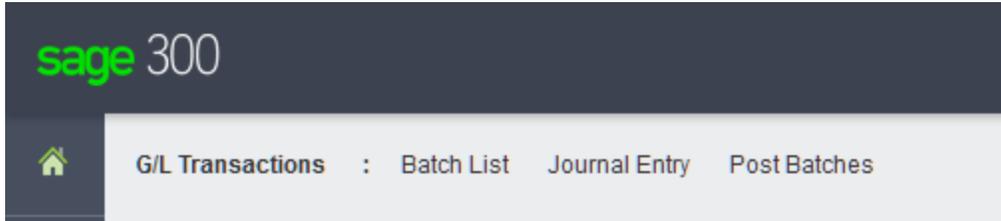
Web toolbar

The web toolbar appears at the right side of your browser window when you are using Sage 300. It includes the tools described below.

You can move the web toolbar by dragging it up or down the right side of your screen. You can also hide or show the web toolbar by clicking the Tools [icon] icon at the top of your screen.

Notes panel

Use the Notes panel to add and manage notes for customers, vendors, and inventory items.

Reports list

The Reports list is available if you use customized SAP Crystal Reports®. Use it to create a list of links to the custom reports you and your team use most often. For more information, see "Adding and managing shortcuts to reports" (page 22).

Inquiry tool

The Inquiry tool allows you to quickly and easily look up information that exists in your Sage 300c system. For more information, see "Looking up information using the Sage 300c Inquiry tool" (page 32).

Managing windows and tasks

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

The Window Manager appears on the web toolbar at the right side of your browser window when you are using Sage 300c, 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.

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

Recently used windows

Like the Window Manager, the Recently Used Windows list appears on the web toolbar at the right side of your browser window.

This list displays windows you've opened recently, and you can click a window on the list to open that window.

About Sage Intelligence Reporting Cloud

Sage Intelligence Reporting Cloud is a financial reporting tool integrated with Sage 300c. It offers ready-to-use online reports that can also be viewed in Microsoft Excel ®. You can customize the ready-to-use financial reports or create new reports specific to your business.

Sage Intelligence Reporting Cloud runs on your Sage 300 server. In Sage 300c web screens, use the **Intelligence** menu to open Sage Intelligence Reporting Cloud and report on your Sage 300 company data.

> **Important!**
> - To use Sage Intelligence Reporting Cloud, users must be assigned to a security group with **Financial Reporter** security authorization for Sage 300 General Ledger and **Sage 300 Web API** security authorization for Sage 300 Common Services.
>
>   Also, for the ADMIN user you must customize two Sage 300 program files. For more information, see Sage Knowledgebase article 84722.
>
> - We recommend that you configure Sage 300c web screens to run in a secured environment using digital certificates. If you do not, warnings will appear in your browser each time you start Sage Intelligence Reporting Cloud. For more information, see Knowledgebase article 84797.

If you use Sage 300c web screens over an external network or the internet, some additional configuration is required to use Sage Intelligence Reporting Cloud. For more information, see Knowledgebase article 90986.

Sage Intelligence Reporting Cloud includes ready-to-use financial reports that give you immediate insight into and across your business. You can customize these reports or create and save your own so you don't have to recreate your reports each time you run them. You can also update a report to filter results by accounts, group categories, or account groups by creating a copy of a report and updating the row sets accordingly.

For information about customizing and printing reports with Sage Intelligence Reporting Cloud, see the Sage Intelligence Reporting Cloud help at https://help.sageintelligence.com/sage300c/en-us/index.htm.

For information about ready-to-use reports, see Sage Intelligence Reporting Cloud Reports at www.sageintelligence.com/solutions/sage-300c/reports.

Customizing Sage 300c web screens and menus

Customize web screens and the navigation menu.

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.

Adding and managing shortcuts to reports

If you use customized SAP Crystal Reports®, the Reports list lets you create a list of links to the custom reports you and your team use most often.

The Reports list appears at the right side of your browser window when you are using Sage 300.

Administrators can use the Reports list to create a list of links to reports. After a report has been added to the Reports list, the link is available to users who are assigned to one of the UI profiles specified for the report.

> **Note:** The Reports list does not support links to datapiped reports. Also, report file names cannot include any spaces.

Before you start

- You must sign in as an administrator ("ADMIN" user) to manage the Reports list.

- Create a new Reports folder in the Shared Data folder on your Sage 300 server, and save all the reports to which you want to create a link. (When creating new links, you select reports saved in this folder.)

To add a report link to the Reports list:

1. Click the Reports list button at the right of your browser window.

   The Reports list appears.

2. Click **Add Report Link**.

   The Add Report Link panel appears.

3. In the **Title** field, add a title for the report link.

4. Click **Browse**.

5. Select a report file, and then click **Select**.

   > **Important!** The report file name cannot include any spaces.

6. In the **UI Profiles** field, specify UI profiles for the report. Only users who are assigned to these profiles can view the report on the Reports list.

   > **Tip:** Click the **UI Profiles** menu ≡ to open a partial version of the UI Profiles screen, which you can use to create a new UI profile, or to review and change the list of users assigned to an existing UI profile. Other features of the full UI Profiles screen (such as the Reports tab) are not available.

7. Click **Save**.

The link is added to the Reports list, with the title you specified appearing as the link text.

To edit a report link:

1. Click the Reports list button at the right of your browser window.

   The Reports list appears.

2. On the report menu ≡ for the report you want to edit, click **Edit**.

3. Edit the report settings as needed.

4. Click **Save**.

To remove a report link from the Reports list:

> **Important!** When you delete a report link from the Reports list, the link is removed for all UI profiles.

1. Click the Reports list button at the right of your browser window.

   The Reports list appears.

2. On the report menu ≡ for the report you want to edit, click **Delete**.

   A confirmation message asks if you want to delete the report.

> **Note:** Deleting a report link from the Reports list does not delete the report file from the Reports folder in the Shared Data folder on your Sage 300 server; only the link is deleted.

3. Click **Yes**.

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 **Administrative Services** > **Customization** > **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**.

Customizing fields and controls on web screens

Many web screens include a **Customize** option on the Options menu that you can use to hide and show fields and controls for that screen, or to customize labels for those fields and controls.

You can create multiple different customized versions of a single screen. Each customized version of a screen must have a distinct **Customization ID**.

Along with the customization ID, you specify the UI profiles that will use the customized screen. This allows you to customize a screen differently for each UI profile, or use the same customized screen for multiple UI profiles.

When you use this feature to make changes to a web screen:

- The changes apply only to users who are assigned to the UI profiles you specify.

- Sage 300 desktop screens are not affected. Similarly, any changes made to desktop screens do not affect the appearance of web screens.

> **Notes:**
> - To hide or show a field and related controls, you may need to clear or select multiple options. For example, to hide a **Ship-To Location** field, you may need to clear options for the label, text box, buttons (such as the **Go**, **Add**, and **Finder** buttons), and the **Details** link.
>
> - Labels for some fields and controls change dynamically when you select filter criteria, document type, or other criteria. Customized labels for these dynamic fields and controls may revert to their original value when a different selection is made.

Before you start

- You must sign in as an administrator ("ADMIN" user) to customize web screens.

- You can customize web screens 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 fields and controls for a web screen:

1. Open a web screen that supports customization.

2. Click **Options** > **Customize**.

3. In the **Customization ID** field, enter an ID for the customized screen.

   You can create multiple different customized versions of a single screen. Each customized version of a screen must have a distinct **Customization ID**.

4. In the **Customization Description** field, enter a description for the customized screen.

5. In the **UI Profiles** field, specify one or more UI profiles. Only users who are assigned to the specified UI profiles will see the customized screen. You can leave this field blank and specify UI profiles later.

   If there are multiple customized versions of a screen, you can specify different UI profiles for each, allowing you to customize a screen differently for each UI profile, or use the same customized screen for multiple UI profiles.

   > **Tip:** Click the **UI Profiles** menu ☰ to open a partial version of the UI Profiles screen, which you can use to create a new UI profile, or to review and change the list of users assigned to an existing UI profile. Other features of the full UI Profiles screen (such as the Reports tab) are not available.

6. To show or hide a field or control, select or clear the check box for that field or control.

7. To change the label for a field or control, enter the new label text in the **Text** column.

8. Click **Save**.

To delete a customized version of a screen:

1. Open a web screen that supports customization.

2. Click **Options** > **Customize**.

3. In the **Customization ID** field, enter the ID for the customized version of the screen that you want to delete.

4. click **Delete**.

Importing and managing customizations for web screens

If you or your Sage business partner use the Sage 300 Web Screens SDK to create customizations for web screens, you can sign in as a UI Customization Admin to import and manage customizations.

By default, imported customization files are saved in the shared data directory in *Directory\Customization\System Database ID\Package ID*. (For example, C:\sage\sage300data\Customization\SAMSYS\Package1.)

To be imported successfully, a customization package must be a ZIP file that contains a valid manifest file and all required JavaScript and settings files.

- The package must be a ZIP file (extension is .zip)
- The package must include a valid JSON file manifest.json
- The package must include any JavaScript and settings files specified in the manifest file
- The manifest file must include the following fields:
    - PackageId
    - BusinessPartnerName
    - Description
    - WebScreens
    - TargetScreen
    - ControlsConfiguration
    - ControlsBehavior

To sign in to Sage 300 as a UI Customization Admin:

1. Visit http://*servername*/sage300/admin, where *servername* is the server name or IP address of the web server where Sage 300 is installed.
2. In the **User ID** field, enter the username of the ADMIN user.
3. Select a system database.
4. Click **Sign In**.

On the **Import** tab, you can specify packages to import and assign Sage 300 databases for which customizations will be available.

To import a customization package:

1. Sign in as a UI Customization Admin.
2. On the **Import** tab, click **Browse** and select a package of web screens customizations created using the Sage 300 Web Screens SDK.
3. Click **Import** to import the customization package.

4. Click **Assign**, and then select each database for which you want the customizations in the imported package to be available.

After importing packages, on the **Manage** tab, you can enable, disable, and prioritize individual customizations.

To manage individual customizations:

1. Sign in as a UI Customization Admin.

2. On the **Manage** tab, in the **Package ID** field, specify whether to view customizations for all imported packages or for a specific package.

3. If you want to enable all customizations for all packages, or for the currently selected package, click **Enable All**.

4. Use Advanced Mode as needed to enable and disable individual customizations, and to specify the priority order in which multiple customizations will be applied to a single web screen.

   a. Select the **Advanced Mode** option.

   b. In the Customization Details table, set the **Status** field to **Enabled** or **Disabled** for individual customizations as needed.

   c. For each screen to which multiple customizations will be applied:

      i. In the **Priority** field, set the priority of the first customization to be applied to the screen to 1.

      ii. Set the priority of the next customization to be applied to the screen to 2, and so on.

5. Click **Save**.

After importing and setting up customizations

- Sign in to each Sage 300 company to which you have applied customizations and verify that each customization is working as expected.

Setting up email for web screens

Sage 300c web screens use SMTP (Simple Mail Transfer Protocol) to send documents via email. You can set up your own SMTP server, or you can use an SMTP service such as SendGrid (www.sendgrid.com).

You use the **Email** tab on the Company Profile web screen to enter default email settings that are used when you print documents to email from web screens.

To set up email for Sage 300c web screens:

1. In Sage 300c web screens, open **Common Services** > **Company Setup** > **Company Profile**.

2. On the **Email** tab, under **Settings**, enter settings for your SMTP server.

   - **Server Name.** Enter the server name for your email server, using the format smtp.*server name*.

   - **Server Port.** The default value is 587, but you can change it. Consult the documentation for your SMTP server or service.

     > **Notes:**
     > - Some SMTP services (including SendGrid) recommend using Port 587 to avoid potential rate limiting or blocking.
     > - SSL is required if you use Port 465.

   - **Use SSL.** The default value is **Yes**, but you can change it.

     > **Important!** This setting affects data encryption and authentication. Consult your IT professional or SMTP server documentation to determine which setting to use.

   - **From Email Address.** Enter the email address to be used when sending email.

     > **Note:** Depending on the SMTP server you use, this address may need to match the one you enter in the **Username** field, or may not work unless you set up an email alias. Consult your SMTP server documentation for details about sending email.

   - **Send Copies To.** To receive copies of emails that you send to customers or vendors, enter one or more email addresses where copies should be sent.

     If you enter multiple email addresses, separate them with a semicolon. For example: User1@company.com;User2@company.com.

     > **Note:** This field works like Bcc (blind carbon copy). Email recipients are not alerted that you have sent a copy to yourself.

   - **Username.** Enter the username for the SMTP server to be used when sending email.

   - **Password.** Enter the password for the email account to be used when sending email.

3. Under **Send Test Email**, specify a test email address and send a test email.

   a. **To.** Enter the email address of the recipient for the test email.

b. **Send a Test Email.** Click to send a test email using the settings specified on the Email tab.

4. If the email message does not arrive in the email inbox of the recipient you specified:

- Check the junk email or spam folder for the email account.

- Check the settings you entered, make any needed changes, and send another test email.

5. Click **OK** to save your settings.

Sage 300c Inquiry

Learn about the Inquiry tool and how you can use it to look up information in your Sage 300c system.

About the Sage 300c Inquiry tool

The Inquiry tool allows you to quickly and easily look up information that exists in your Sage 300c system. Choose one of the preset query types and specify search criteria, and the tool displays matching results. For example, to find all A/R documents for a particular customer, use the **A/R Documents** query type and specify the customer number in search criteria.

When some results are displayed, you can see more information related to a specific transaction by selecting the transaction in the main table (for some query types, information related to the selected transaction is displayed in other tables), or by drilling down to source transactions.

The query type you choose determines the default state of search criteria in the Inquiry tool. However, once you've opened the Inquiry tool, you can change search criteria to perform other queries, as long as they are consistent with the query type.

For example, the **A/R Documents** query type is limited to finding A/R documents. By default, search criteria for this query type are set up to find all A/R documents for a single customer. You can change the search criteria to find A/R documents based on any combination of customer numbers, document types, fully paid status, and national accounts. But you cannot use this query type to find O/E documents.

> **Notes:**
> - If your Sage 300 system uses security, you must have **Sage 300 ERP Inquiry** security authorization to use the Inquiry tool.
>
> - In a multicurrency system, you can specify whether to show amounts in the functional currency or in the customer's currency.

You can open the Inquiry tool from various places, though not all query types are available from all these places:

- **Web toolbar.** Most query types are available from the web toolbar at the right of the screen.

- **A/R Customers screen.** Customer query types are available from the Inquiry list on this screen.

> **Note:** By default, these query types find documents for the customer whose record is open in the A/R Customers screen.

- **Other screens.** Some fields include an **Inquiry** option on the menu beside the field (for example, the Customer Number field on the A/R Invoice Entry screen).

Query Types

The following query types are available:

- **A/R Documents.** Look up all types of posted and pending transactions for customers.

- **A/R Customer Adjustments.** Look up posted adjustments (including adjustments from write-off batches), along with the documents they adjusted.

- **A/R Customer Documents.** Look up posted invoices, credit notes, debit notes, interest charges, receipts (including unapplied cash, prepayments, and miscellaneous receipts), and refunds.

- **A/R Customer Receipts.** Look up posted receipts for payments, including information about the documents to which each receipt was applied.

- **A/R Customer Refunds.** Look up posted refunds, including information about the documents that were refunded.

Looking up information using the Sage 300c Inquiry tool

The Inquiry tool allows you to quickly and easily look up information that exists in your Sage 300c system.

To look up information using the Inquiry tool:

1. Open the Inquiry tool in one of the following ways:

   - On the web toolbar at the right of the screen, click the **Inquiries** button, and then choose a query type.

   - On the A/R Customers screen, click **Inquiry**, and then choose a query type.

   - On other screens, click the **Inquiry** option on a field where it is available.

   The Inquiry tool appears, set up in the default state for the query type you chose.

> **Note:** Depending on the query type and the information in your Sage 300c system, you may need to change or specify search criteria before any results are displayed.

2. To view search criteria, click **Filter**.

3. Specify search criteria, and then click **Apply**.

   Results that match the criteria you specified are displayed.

   When some results are displayed, you can see more information related to a specific transaction by selecting the transaction in the main table (for some query types, information related to the selected transaction is displayed in other tables), or by drilling down to source transactions.

   > **Note:** To change or refine your search, change search criteria and then click **Apply** again.

Appendix A: List of Sage 300c web screens

New web screens are added with each Sage 300c release and product update. Consult this list to see web screens that are available in the Sage 300c 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	2018	2018.1	2018.2
G/L Accounts	*Account History Inquiry*			
G/L Accounts	Account Permissions	✔	✔	✔
G/L Accounts	Accounts	✔	✔	✔
G/L Accounts	*Budget Maintenance*			
G/L Accounts	*Chart of Accounts*			
G/L Accounts	Create Accounts	✔	✔	✔
G/L Accounts	Fiscal Set Comparison	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
G/L Accounts	*Source Currency Inquiry*			
G/L Accounts	Transaction History	✓	✓	✓
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	✓	✓	✓
G/L Periodic Processing	Create Revaluation Batch	✓	✓	✓
G/L Periodic Processing	Period End Maintenance	✓	✓	✓
G/L Reports	*Account Groups Report*			
G/L Reports	*Account Structures Report*			
G/L Reports	Batch Listing Report	✓	✓	✓
G/L Reports	Batch Status Report	✓	✓	✓
G/L Reports	Chart of Accounts Report	✓	✓	✓
G/L Reports	*Optional Fields Report*			
G/L Reports	*Options Report*			
G/L Reports	Posting Journals Report	✓	✓	✓
G/L Reports	*Recurring Entries Report*			
G/L Reports	*Revaluation Codes Report*			
G/L Reports	*Segment Codes Report*			
G/L Reports	*Source Codes Report*			

Category	Screen	2018	2018.1	2018.2
G/L Reports	*Source Journal Profiles Report*			
G/L Reports	*Source Journals Report*			
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	✔	✔	✔
G/L Setup	*Revaluation Codes*			
G/L Setup	Segment Codes	✔	✔	✔
G/L Setup	Source Codes	✔	✔	✔
G/L Setup	*Source Journal Profiles*			
G/L Transactions	Batch List	✔	✔	✔
G/L Transactions	Journal Entry	✔	✔	✔
G/L Transactions	Post Batches	✔	✔	✔

Accounts Payable web screens

Category	Screen	2018	2018.1	2018.2
A/P Periodic Processing	1099 Electronic Filing	✔	✔	✔
A/P Periodic Processing	Clear History	✔	✔	✔
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	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
A/P Setup	Payment Codes	✔	✔	✔
A/P Setup	Payment Selection Codes	✔	✔	✔
A/P Setup	Terms	✔	✔	✔
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	✔	✔	✔
A/P Transactions	Adjustment Batch List	✔	✔	✔
A/P Transactions	Adjustment Entry	✔	✔	✔
A/P Transactions	Control Payments	✔	✔	✔
A/P Transactions	Create Payment Batch	✔	✔	✔
A/P Transactions	Invoice Batch List	✔	✔	✔
A/P Transactions	Invoice Entry	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
A/P Transactions	Payment Batch List	✔	✔	✔
A/P Transactions	Payment Entry	✔	✔	✔
A/P Transactions	Payment Inquiry	✔	✔	✔
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	2018	2018.1	2018.2
A/R Customer Reports	Customer Groups Report	✔	✔	✔
A/R Customer Reports	Customers Report	✔	✔	✔
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	✔	✔	✔
A/R Customers	Customer Inquiry	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.
A/R	Customer List			

Category	Screen	2018	2018.1	2018.2
Customers				
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	✔	✔	✔
A/R Periodic Processing	Revaluation	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
A/R Periodic Processing	Update Recurring Charges	✓	✓	✓
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	Aged Trial Balance Report	✓	✓	✓

Category	Screen	2018	2018.1	2018.2
Transaction Reports				
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	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
A/R Transaction Reports	Receipts Report	✔	✔	✔
A/R Transactions	Adjustment Batch List	✔	✔	✔
A/R Transactions	Adjustment Entry	✔	✔	✔
A/R Transactions	Document Inquiry	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.
A/R Transactions	Invoice Batch List	✔	✔	✔
A/R Transactions	Invoice Entry	✔	✔	✔
A/R Transactions	Post Batches	✔	✔	✔
A/R Transactions	Process Credit Card Transactions	✔	✔	✔
A/R Transactions	Quick Receipt Entry	✔	✔	✔
A/R Transactions	Receipt Batch List	✔	✔	✔
A/R Transactions	Receipt Entry	✔	✔	✔
A/R Transactions	Receipt Inquiry	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.
A/R	Refund Batch List	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
Transactions				
A/R Transactions	Refund Entry	✔	✔	✔
A/R Transactions	Refund Inquiry	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.	Use the Sage 300c Inquiry tool.

Operations web screens

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

Inventory Control web screens

Category	Screen	2018	2018.1	2018.2
I/C Items and Price Lists	*Bills of Material*			
I/C Items and Price Lists	*Contract Pricing*			
I/C Items and Price Lists	*Copy Bills of Material*			
I/C Items and Price Lists	*Copy Item Pricing*			
I/C Items and Price Lists	Customer Details	✔	✔	✔
I/C Items and Price Lists	Item Pricing	✔	✔	✔
I/C Items and Price Lists	Items	✔	✔	✔
I/C Items and Price Lists	*Items Wizard*			
I/C Items and Price Lists	Kitting Items	✔	✔	✔
I/C Items and Price Lists	Location Details	✔	✔	✔
I/C Items and Price Lists	*Lot Numbers*			

Category	Screen	2018	2018.1	2018.2
I/C Items and Price Lists	Manufacturers' Items	✔	✔	✔
I/C Items and Price Lists	*Optimize Inventory*			
I/C Items and Price Lists	Reorder Quantities	✔	✔	✔
I/C Items and Price Lists	*Serial Numbers*			
I/C Items and Price Lists	*Update Bills of Material*			
I/C Items and Price Lists	*Update Item Pricing*			
I/C Items and Price Lists	Update Item Pricing	✔	✔	✔
I/C Items and Price Lists	Vendor Details	✔	✔	✔
I/C Periodic Processing	*Clear History*			
I/C Periodic Processing	Create G/L Batch	✔	✔	✔
I/C Periodic Processing	Day End Processing	✔	✔	✔
I/C Periodic Processing	*Delete Inactive Records*			
I/C Periodic Processing	*Lot Recalls/Releases*			
I/C Periodic Processing	*Lot Splits/Combines*			
I/C Periodic Processing	*Process Adjustments*			
I/C Periodic Processing	*Quarantine Release*			
I/C Periodic Processing	*Serial Registration*			
I/C Periodic Processing	*Serial/Lot Reconciliations*			
I/C Periodic Processing	*Warranty Update*			
I/C Physical Inventory	Generate Inventory Worksheet	✔	✔	✔
I/C Physical Inventory	Inventory Counts	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
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/C Setup	*Contract Codes*			
I/C Setup	G/L Integration	✓	✓	✓
I/C Setup	Item Structures	✓	✓	✓
I/C Setup	Locations	✓	✓	✓
I/C Setup	*Mask Structures*			

Category	Screen	2018	2018.1	2018.2
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/C Setup	*Warranty Codes*			
I/C Setup	Weight Units of Measure	✔	✔	✔
I/C Setup Reports	*Account Sets Report*			
I/C Setup Reports	Alternate Items	✔	✔	✔
I/C Setup Reports	*Bills of Material Report*			
I/C Setup Reports	*Categories Report*			
I/C Setup Reports	*Item Structures Report*			
I/C Setup Reports	*G/L Integration Report*			
I/C Setup Reports	*Kitting Items Report*			
I/C Setup Reports	*Location Details Report*			
I/C Setup Reports	*Locations Report*			
I/C Setup Reports	*Manufacturers' Items Report*			
I/C Setup Reports	*Mask Structures Report*			
I/C Setup Reports	*Options Report*			
I/C Setup Reports	*Optional Fields Report*			
I/C Setup Reports	*Price List Codes Report*			

Category	Screen	2018	2018.1	2018.2
I/C Setup Reports	*Reorder Quantities Report*			
I/C Setup Reports	*Segment Codes Report*			
I/C Setup Reports	*Units of Measure Report*			
I/C Setup Reports	*Vendor Details Report*			
I/C Setup Reports	*Warranty/Contract Codes Report*			
I/C Setup Reports	*Weight Units of Measure Report*			
I/C Statistics and Inquiries	*BOM Component Usage Inquiry*			
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/C Statistics and Inquiries	*Lot Number Inquiry*			
I/C Statistics and Inquiries	Sales Statistics	✔	✔	✔
I/C Statistics and Inquiries	*Serial Number Inquiry*			
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	✔	✔	✔
I/C Stock Control Reports	Item Labels Report	✔	✔	✔
I/C Stock Control Reports	Item Status Report	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
I/C Stock Control Reports	Item Valuation Report	✔	✔	✔
I/C Stock Control Reports	Overstocked Items Report	✔	✔	✔
I/C Stock Control Reports	*Quarantine Report*			
I/C Stock Control Reports	*Recall Report*			
I/C Stock Control Reports	Reorder Report	✔	✔	✔
I/C Stock Control Reports	*Serial/Lot Number List Report*			
I/C Stock Control Reports	*Serial/Lot Quantity on Hand Report*			
I/C Stock Control Reports	*Serial/Lot Stock Listing Report*			
I/C Stock Control Reports	*Serial/Lot Transactions Report*			
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/C Transactions	*Assemblies*			
I/C Transactions	Internal Usage	✔	✔	✔
I/C Transactions	Post Transactions	✔	✔	✔
I/C Transactions	Receipts	✔	✔	✔
I/C Transactions	Shipments	✔	✔	✔
I/C Transactions	Transaction Listing	✔	✔	✔
I/C Transactions	Transfers	✔	✔	✔

Order Entry web screens

Category	Screen	2018	2018.1	2018.2
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	✔	✔	✔
O/E Reports	*Email Messages Report*			
O/E Reports	*G/L Integration Report*			
O/E Reports	G/L Transactions Report	✔	✔	✔
O/E Reports	Invoice Action Report	✔	✔	✔
O/E Reports	*Optional Fields Report*			
O/E Reports	*Options Report*			
O/E Reports	Order Action Report	✔	✔	✔
O/E Reports	*Miscellaneous Charges Report*			
O/E Reports	Posting Journals Report	✔	✔	✔
O/E Reports	Sales History Report	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
O/E Reports	Sales Statistics Report	✔	✔	✔
O/E Reports	Salesperson Commissions Report	✔	✔	✔
O/E Reports	*Ship-Via Codes Report*			
O/E Reports	*Templates Report*			
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	✔	✔	✔
O/E Statistics and Inquiries	Salesperson Inquiry	✔	✔	✔
O/E Transactions	Copy Orders	✔	✔	✔
O/E Transactions	Credit/Debit Note Entry	✔	✔	✔
O/E Transactions	Invoice Entry	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
O/E Transactions	Order Entry	✔	✔	✔
O/E Transactions	Shipment Entry	✔	✔	✔
O/E Transactions	Capture Payments with Invoices	✔	✔	✔

Purchase Orders web screens

Category	Screen	2018	2018.1	2018.2
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	✔	✔	✔
P/O Create Purchase Orders	Create POs from Requisitions	✔	✔	✔
P/O Forms	Mailing Labels	✔	✔	✔
P/O Forms	Purchase Orders	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
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	✔	✔	✔
P/O Setup Reports	*Additional Costs Report*			
P/O Setup Reports	*Email Messages Report*			
P/O Setup Reports	*G/L Integration Report*			
P/O Setup Reports	*Optional Fields Report*			
P/O Setup Reports	*Options Report*			
P/O Setup Reports	*Ship-Via Codes Report*			
P/O Setup Reports	*Templates Report*			

Category	Screen	2018	2018.1	2018.2
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	2018	2018.1	2018.2
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	2018	2018.1	2018.2
Bank Periodic Processing	Clear History	✔	✔	✔
Bank Periodic Processing	Create G/L Batch	✔	✔	✔
Banks	Banks	✔	✔	✔
Bank Setup	Credit Card Types	✔	✔	✔
Bank Setup	Distribution Codes	✔	✔	✔
Bank Setup	Distribution Sets	✔	✔	✔
Bank Setup	G/L Integration	✔	✔	✔
Bank Setup	Options	✔	✔	✔
Bank Setup Reports	*Banks Report*			
Bank Setup Reports	*Credit Card Types Report*			
Bank Setup Reports	*Distribution Codes Report*			
Bank Setup Reports	*Distribution Sets Report*			
Bank Setup Reports	*G/L Integration Report*			
Bank Setup Reports	*Options Report*			
Bank Transaction Reports	Bank Entries Posting Journal Report	✔	✔	✔
Bank Transaction Reports	Bank Reconciliation Report	✔	✔	✔
Bank Transaction Reports	Check/Payment Register Report	✔	✔	✔
Bank Transaction Reports	Deposit Register Report	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
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	2018	2018.1	2018.2
Tax Setup	Tax Authorities	✔	✔	✔

Category	Screen	2018	2018.1	2018.2
Tax Setup	Tax Classes	✔	✔	✔
Tax Setup	Tax Groups	✔	✔	✔
Tax Setup	Tax Rates	✔	✔	✔
Tax Periodic Processing	Clear History	✔	✔	✔
Tax Setup Reports	*Tax Authorities Report*			
Tax Setup Reports	*Tax Classes Report*			
Tax Setup Reports	*Tax Groups Report*			
Tax Setup Reports	*Tax Rates Report*			
Tax Setup Reports	Tax Tracking Report	✔	✔	✔

Administration web screens

Administration modules include Administrative Services and Common Services.

Administrative Services web screens

Category	Screen	2018	2018.1	2018.2
Administration	*Assign UI Profiles*			
Administration	*Assign Visual Process Flows*			
Administration	*Customization Directories*			
Administration	*Data Activation*			
Administration	*Database Dump*			
Administration	*Database Load*			

Category	Screen	2018	2018.1	2018.2
Administration	Customize Navigation Menu	✔	✔	✔
Administration	Data Integrity	✔	✔	✔
Administration	Restart Maintenance	✔	✔	✔
Administration	Security Groups	✔	✔	✔
Administration	*UI Profile Maintenance*			
Administration	User Authorizations	✔	✔	✔
Administration	*User Authorizations Report*			
Administration	*Users*			

Common Services web screens

Category	Screen	2018	2018.1	2018.2
Company Setup	Company Profile	✔	✔	✔
Company Setup	Fiscal Calendar	✔	✔	✔
Company Setup	Optional Fields	✔	✔	✔
Currency	*Currency Codes*			
Currency	*Currency Rate Types*			
Currency	*Currency Rates*			
Currency	*Euro Conversion Rates*			
Scheduling	*Reminder List*			
Scheduling	Schedules	✔	✔	✔

Appendix B: Tips and tools

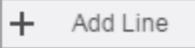Find tips and tools for data entry and other key tasks in Sage 300.

Data entry tools

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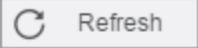
Data entry tools

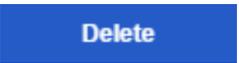| Tool	Name	Description
☰	Context Menu	The context menu appears next to some data entry fields, and displays a list of available options related to a field. For example, the context menu for the **Ship-To Location** field may display the following options: • **View Ship-To Location** • **Edit Ship-To Location**
▭▭	Collapse All / Expand All	Click to collapse or expand all expanding sections on a screen.
📅	Date Selector	Click the date selector button to view a calendar and select a date.
🔍	Finder	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.

Tool	Name	Description
		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: Account Number starts with 21 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.
↵	Go Button	The Go button appears on screens where you must specify a record (such as a 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.
⑦	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	Add Line	Click **Add Line** to add a new line to a detail entry table.
🗑 Delete Line	Delete Line	Click **Delete Line** to delete a selected line from a detail entry table.
||| Edit Columns	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

Tool	Name	Description
		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 2 of 3 ▶ ⏭	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 the first and last records. You can also enter a page number in the Page field and press Enter to skip to that page.
↻ Refresh	Refresh Button	Click **Refresh** to refresh the information displayed in the detail entry table.

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 shows 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.

Filtering Data When Exporting

You can use filters to narrow the data that is included when you export records.

To filter data when exporting:

1. Open the screen that displays the kind of data that you want to export.

2. Click **Options** > **Export**.

   The Export screen appears.

3. Click the **Filters** tab.

4. In the **Column** field, specify a field that will be exported.

   You select from a list of fields that can be exported from the screen. For example, when exporting data from the Currency Codes screen, the following fields are available:

   - Currency Code
   - Description
   - Symbol
   - Decimal Places
   - Symbol Position
   - Thousands Separator
   - Decimal Separator
   - Negative Display

5. Click **Add**.

   The field name is added to the table of filters, in the first empty column.

6. In the new column, click **Add criteria**.

   The **Create filter for field** screen appears.

7. In the first field, select a relational operator.

   You can select from the following relational operators:

Symbol	Meaning
=	Equal to
!=	Not equal to
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
LIKE	Use this operator to find a group of characters or a single character. • The default setting is for a group of characters. The program inserts a % (percent sign) after the value you enter in the next field. • To find a single character, enter _ (the underscore character) after the value. **Tip:** To select a field name as the value, select the **Set value as field name** option. The second field then contains a drop-down list from which you can select any available field name.

8. In the second field, enter a value to which the operator relates.

   For example, if you were creating a filter for the Currency Code field, and you entered **<=** in the first field and **900** in the second field, the filter would find any currency code lower than 901.

9. Click **OK**.

   The filter appears in the table and the Results Preview tab lists records that will be included in the export, based on the filters you've created.

> **Tips:**
> - You can add multiple filters for a single field. For example, to find currency codes between CAD and USD, you could enter two filters for the Currency Code field:
>
>   > CAD
>
>   < USD
>
> - Click **Show Filter** to see the filters you've created as a string of code. This can be used in various ways (for example, as part of a SQL statement).

10. Click **Export** to export filtered data.

    The export includes only records that match:

    - At least one of the filters in a vertical column.

    - All the conditions in a horizontal row.