

Sage 300 2024

Web screens getting started guide

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Contents

Chapter 1: Discover Sage 300 web screens	1
Home Page	1
Administration and User Management	2
Financial Management	2
Operations Management	3
Reports	4
Chapter 2: Frequently asked questions	5
General questions	5
Product features	7
Reporting and intelligence	8
Hardware and software requirements	8
Customization	9
Chapter 3: Getting started with Sage 300 web screens	10
Installing Sage 300 web screens	10
Signing in to Sage 300 in a browser	11
Finding and learning about features	12
Managing windows and tasks	16
Chapter 4: About Sage 300 Financial Reporter for the Web	18
Prerequisites:	18
Installation	19
Chapter 5: Customizing Sage 300 web screens and menus	20
Setting home page widgets	20
Adding and managing shortcuts on reports	21
Customizing the navigation menu	23
Customizing fields and controls on web screens	24
Importing and managing customizations for web screens	26
Setting up email for web screens	28

Chapter 6: Search and inquiry tools	31
About the Sage 300 Inquiry tool	31
Looking up information using inquiry tools	33
Create the custom query	35
About Global search	36
Looking up information using Global Search	37
Tips and Tools	39
Data entry tools	39
Keyboard shortcuts	42
Working with detail entry tables	44
Filtering data when exporting	45

Chapter 1: Discover Sage 300 web screens

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

Whether you're using a desktop computer, laptop, or tablet, you can enter transactions, generate reports, manage company finances, etc. —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, while working seamlessly with a single shared set of company data.

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

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.

1. 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.
2. 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.
3. 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 and User Management

Use administration and user management features to set up your company; add and manage user groups; and maintain your data.

- **Set up your company:** Create your company profile and optional fields, specify currency settings, and set up your fiscal calendar.
- **Manage users and security:** Set up security for your system and assign users to security groups.
- **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 multi-currency 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.

Project and Job Costing: Project and Job Costing is ideal for builders, contractors, manufacturers, or any job- or project-oriented service organization. It lets you manage all aspects of your contracts, from estimates through completion. Track costs and revenues, monitor job progress, and measure profitability over one or many periods.

Reports

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

Chapter 2: Frequently asked questions

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

General questions

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

1. 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.
2. The Sage 300 Portal is no longer available.
3. In Sage 300 2018 and earlier versions, it provided access to Sage 300 desktop screens in a web browser, and featured an ad hoc Inquiry tool. ["About the Sage 300 Inquiry tool" \(page 31\)](#).
4. Web deployment no longer available.

In Sage 300 2018 and earlier versions, it provided a web-based platform for accessing Sage 300 using IIS and remote access technology (Microsoft .NET Framework or Distributed COM remoting).

Do web screens replace the Sage 300 Portal?

Yes. The Sage 300 Portal is no longer available, and features it provided are now available in web screens, including ad hoc inquiry and support for the quotes-to-orders feature in Sage CRM.

Web screens use the Portal database, so if you already use the Portal, you do not need to create or set up a new database to start using web screens. For more information, see: ["Installing Sage 300 web screens" \(page 10\)](#).

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
- Project and Job Costing

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 multi-currency systems supported?

Yes.

Is Payment Processing available?

Yes.

Are Inter-company Transfers available?

No. To manage inter-company transfers, use Sage 300 desktop screens.

Is Project and Job Costing available?

Yes. A selection of frequently used Project and Job Costing web screens are available, with more screens planned for upcoming releases.

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?

Reports in Sage 300 are generated in one of the following ways:

- Using Financial Reporter.
- Using report printing screens in Sage 300

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 Sage 300 Portal, which is no longer available, used Apache Tomcat.

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 300 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.

Chapter 3: Getting started with Sage 300 web screens

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

Installing Sage 300 web screens

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

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

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

Before installing Sage 300

1. Verify that your system meets all hardware and software requirements listed in the Compatibility Guide:
<https://support.na.sage.com/selfservice/viewdocument.do?externalId=26777>
2. Install Microsoft Internet Information Services (IIS) if you have not already done so. Sage 300 Installation and Administration Guide (Chapter 2 Installing Sage 300 Programs)

Note: If you encounter any issues when trying to use web screens after installing, see the Troubleshooting section in Chapter 10 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 Sage 300 web screens. (Sage 300

Installation and Administration Guide Chapter 4 Creating Microsoft SQL Server Databases section)

When you install Sage

1. On the Select >Features screen, select the Web Screens option.
2. If web screens >will be used in a language other than English, select the relevant language pack.

After installing Sage 300:

1. Configure the Portal database, which is used by Sage 300 web screens. (Sage 300 Installation and Administration Guide Chapter 7)
2. Ensure that users have security authorization to access all modules and screens they need to use. (Sage 300 Installation and Administration Guide Chapter 8)
3. Activate all modules for which you want to use Sage 300 web screens. You can do this from the Data Activation screen on the Sage 300 desktop, or using the Data Activation utility that is available on the Windows Start menu (under Sage 300 Admin Utilities).

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 web screens.

Signing in to Sage 300 in a browser

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

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

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

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

To sign in to Sage 300 in a browser:

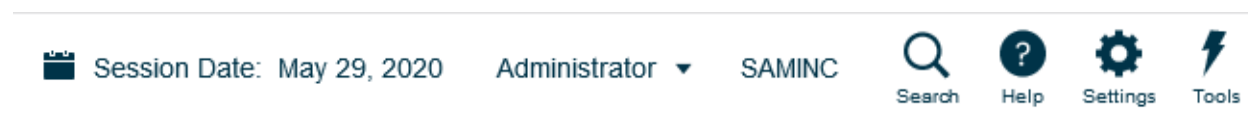
1. Visit `servername/sage300` where `servername` is the server name or IP address of the web server where Sage 300 is installed. If using `https`, then type `https://servername/Sage300`.
2. Enter your username and password. Your system may be set up to show only companies for which you have security 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 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 `Company` was displayed, `Company2` opens.
3. Select a company.
4. Click `Sign In`.

Finding and learning about features

A number of tools are available to help you find and learn about program features in the web

Welcome bar

At the top of the screen, the welcome bar displays the session date, the Account menu, your company name, Global Search, the Help menu, the Settings menu, and the Tools icon.



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

Global Search allows you to quickly search your entire Sage 300 database for transactions or records. For more information, see: ["Looking up information using global search" \(page 37\)](#).

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 Settings menu includes a Text Size setting that lets you change the size of text on web screens to smaller sizes than the default. Using smaller text lets you see more fields and controls without having to scroll down. This setting affects all screens, but you can also change the size of text for individual screens.

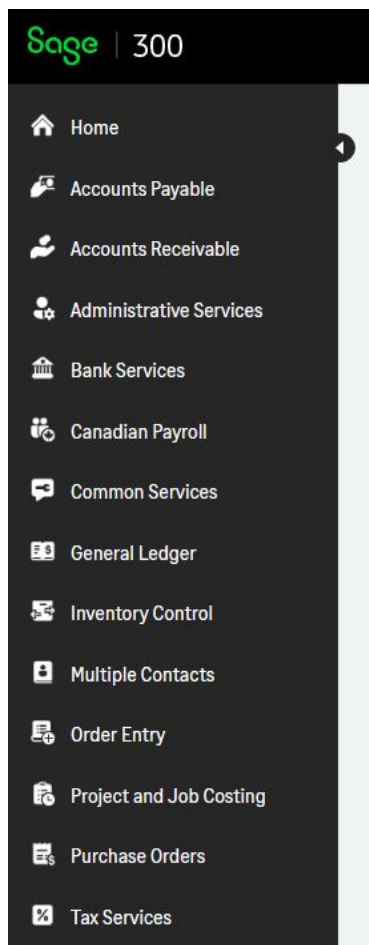
For more information, see: ["Changing the size of text on screens" \(page 16\)](#).

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 300cloud 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 one of these icons, the full name of the module is displayed. You can expand the whole menu to show module names by clicking Expand Menu  at the top right of the menu.



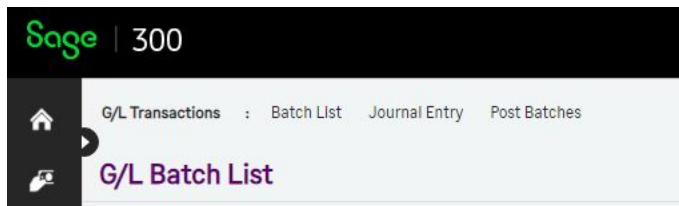
Features differ by module, but are usually organized into some or all of the following categories

- 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 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



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" \(page 21\)](#).

Inquiry tool



The Inquiry tools allows you to quickly and easily look up information that exists in the Sage 300 system. For more information, see: ["Looking up information using the Sage 300 Inquiry tool" \(page 33\)](#).

Changing the size of text on screens

You can change the size of text on web screens to smaller sizes than the default. Using smaller text lets you see more fields and controls without having to scroll. You can set text size for all screens, or for individual specific screens, as follows:

- To set text size for all screens, use the Text Size setting on the Settings menu on the welcome bar. In addition to text sizes, this setting includes an option to Reset, which clears all text size settings from specific screens and resets all screens to use the text size selected here.

For more information about the welcome bar, see: ["Finding and learning about features" \(page 12\)](#).

- To set text size for a specific screen, use the Text Size setting on the Options menu for the screen. (The setting is available on all screens that have an Options menu.)
- If you set text size for a specific screen, the text size setting on the welcome bar no longer affects this screen. For example, if you set text size on the A/P Payment Entry screen to Small, the text size on this screen will remain set to Small regardless of the text size you set on the welcome bar (unless you reset, as described above).


Note: If you have integrated Sage CRM with Sage 300, Sage 300 screens always use the default text size when they are opened in Sage CRM.

Managing windows and tasks

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

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



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

Note: If you close all windows, Sage 300 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.

Chapter 4: About Sage 300 Financial Reporter for the Web

Sage 300 Financial Reporter for the Web allows you to create and print financial statements from Sage 300 web screens, using Microsoft Excel.

Using the G/L Print Financial Statements web screen, you can generate financial statements in MS Excel, and then print them from Excel.

Using the G/L Statement Designer web screen, you can download and create or edit statement specifications in MS and then re-upload them to the server where other users can then use or print them.

Prerequisites:

In addition to having General Ledger and web screens installed and working, Financial Reporter for the web also requires the following prerequisites:

1. The 64-bit desktop version of MS Office 365 must be installed and logged in on both server and web client machines.
 - If you are using earlier versions of MS Office, please see Sage 300 KB article https://support.na.sage.com/selfservice/microsites/msbrowse.do?%55%4d%42rowse%53election=%53%47%53%41%47%45300%45%52%50_1&utm_source=helpmenu&utm_medium=inproduct&utm_campaign=sage300
 - Both server and web client should use the same version of MS Office.
2. You need to install an Excel G/L Financial Reporter for the Web add-in on any computer where you will be editing statements downloaded in the Statement Designer web screen.
 - The Add-in enables you to see and use the Financial Reporter functions such as FR Paste and FR View.
 - You do not need the add-in if you are just printing statements from the Print Financial Statements web screen. (Installation steps for this add-in are below)

Installation

Once you have ensured you have all prerequisites on the server and client machines, you can install the G/L Financial Reporter add-in:

1. In Sage 300 web screens, sign in to a company and then open General Ledger > G/L Financial Reporter > Statement Designer
2. On the Get Started tab, click the Get Add-in button. This downloads the Add-in installer to your default downloads location.
3. Open the downloads folder and double click the Sage 300 GL Financial Reporter Addin.msi file to run the installer.
 - a. On the Welcome screen click Next
 - b. Click the option to select the license agreement and then click Next
 - c. Click Install: If necessary, enter an Administrator login in the UAC (User Account Control) popup.
 - d. Click Finish once the installation is finished

Now the add-in is installed, go to the G/L Statement Designer screen, and click Create New Statement to begin creating a new financial statement. Or you can go to the Statements tab and click Edit to download existing statement specifications.

Note: Any existing statement specifications you want to make available to web users in the G/L Statement Designer screen should be copied first to the Sage 300 SharedData\Company\FinancialReporter folder. This includes sample G/L financial statements which are located by default in the GLXXA\Language folder (for example, GL71A\ENG\ folder)

For more detailed information on installation and use please see the "Sage 300 Financial Reporter for the Web" user guide.

Chapter 5: Customizing Sage 300 web screens and menus

Customize web screens and the navigation menu.

Setting 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 the widgets are your company's functional currency.

Widget settings and options

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

- Edit Settings by specifying the 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 by entering a new name for the widget.
- Refresh the data displayed in the widget.
- 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 on 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 datapipe reports. Also, report file names cannot include any spaces.

Before you start

- You must sign in as an 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.

Note: When creating new links, 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, and a Reports list will appear.
2. Click **Add Report Link** and the **Add Report Link** panel will appear.
3. In the Title field, add the report link title
4. Click **Browse**
5. Select a report file then click **Select**.

Important! The report file name CANNOT contain 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

8. Click the **Reports** list button at the right of your browser window, and the Reports list will appear.
9. On the report menu ☰ for the report you want to edit, click **Edit**.
10. Edit the report settings as needed.
11. 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 on the right of your browser window, and the Reports list will appear.

2. Click **Delete** on the report menu for the report you want to edit, and a confirmation message asking if you want to delete the report, will appear.

Note: Deleting a report link from the Reports list, does not delete the report from 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.

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 them until they refresh their browser or resign in.
- 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.
3. Select check boxes to show hidden screens, categories or modules in the navigation menu.
4. Click Save

Customizing fields and controls on web screens

Many web screens include a customize options on the **Options** menu that you can use to:

- show or hide fields and controls for a particular screen
- 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 the users who are assigned to the UI profile, or use the same customized screen for multiple UI profiles.
- Sage 300 desktop screens are not affected. Similarly, any changes on desktop screens do not affect the appearance of the web screens.

Note:

- 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 ADMIN 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 the relevant ID for the customized screen.

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

4. Enter a customized screen description in the Customization Description field.
5. In the UI profiles field, specify one or more UI profiles,

Note: Only Users 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. Other features of the full UI profile screen are not available.

6. To show or hide a field or control, select or clear the relevant check box.
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\.

Example: C:\Sage\Sage300\SharedData\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
- Then 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. If `https` is used, then type <https://servername/sage300/admin>.
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 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:
 - In the Priority field, set the priority of the first customization to be applied to the screen to 1.

- 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

You can set up Sage 300 web screens to send documents via email.

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 300 web screens:

1. In Sage 300 web screens, open Common Services > Company Setup > Company Profile
2. On the Email tab, specify an email service (how you will email documents), and then enter settings for the email service:
 - 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.

Note:

- Some SMTP services 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.

- **Username** - Enter the username for the SMTP to be used when sending email.
- **Password** - Enter the password for the email account to be used when sending email.
- **Tenant ID** - Enter the tenant ID (alternatively called the directory ID) from your Microsoft 365 account.
- **Client ID** - Enter the client ID (alternatively called the application ID) from your Microsoft 365 account.
- **Client Secret** - Enter the client secret from your Microsoft 365 account.

For additional technical information about setting up Microsoft Graph, see Sage Knowledgebase article [115363](#).

3. Enter other settings.

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

Note: If you send email using Basic Authentication SMTP as your email service, 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.

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

- To Enter the email address of the recipient for the test email.
- Send a Test Email. Click to send a test email using the settings specified on the Email tab.

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

Chapter 6: Search and inquiry tools

Learn about tools for looking up records, transactions, and information in your Sage 300 system.

About the Sage 300 Inquiry tool

The Inquiry tool allows you to quickly and easily look up information that exists in your Sage 300 system. You do this by opening a query, which displays information in a results table (the type of information is determined by the query you choose). You then use filters and other controls to refine what and how information is displayed in the results table. From the results table, you can drill down to source transactions and other records. You can also export data from the results table to a Microsoft Excel file.

Many standard queries are available, which allow you to find various types of information. For example, General Ledger Transactions, Inventory Items, Order Entry Invoices, and more.

In addition to using standard queries, you can create custom queries by changing an existing query and then saving your version as a custom query. When saving a custom query, you can specify whether it is private (available only to you) or public (available to all users).

Note: If your Sage 300 system uses security, you must have Sage 300 ERP Inquiry security authorization to use the Inquiry tool.

Special queries for Accounts Receivable

There are some special queries available that you can use to look up Accounts Receivable documents:

- **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.

These A/R queries are special in several ways:

- You cannot create custom queries from them.
- You do not open them from the main Inquiry tool. Instead, you open them from the following places:
 - **Navigation menu** - You can open the
 - A/R Documents query from **Accounts Receivable > A/R Transactions > Document Inquiry**
 - A/R Customer Documents query from **Accounts Receivable > A/R Customers > Customer Inquiry**.
 - **A/R Customers screen** - Customer queries are available from the Inquiry list on this screen.

Note: By default, these queries 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).
- They work differently than the queries in the main Inquiry tool.

After opening one of the A/R queries, no results are initially displayed. You must first specify search criteria (filters) and then click Apply. The tool displays matching results.

Note: In a multi-currency system, you can specify whether to show amounts in the functional currency or in the customer's currency.

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 of these queries, information related to the selected transaction is displayed in other tables), or by drilling down to source transactions.

The query you choose determines the default state of search criteria. However, once you've opened the query, you can change search criteria, as long as your changes are consistent with the type of information that the query is designed to find.

Example: The A/R Documents query is limited to finding A/R documents. By default, search criteria for this query 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 to find O/E documents.

Looking up information using inquiry tools

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

There are some special queries available that you can use to look up Accounts Receivable documents. These queries work differently than other queries. This topic includes instructions for using both regular queries and the special A/R queries.

To look up information using a regular query

1. On the web toolbar at the right of the screen, click the Inquiries button.
2. In the Data Source field, select a data source to indicate the general type of information you are looking for.
3. On the Standard Queries or Custom Queries tab, click a query.

Note: At the top of the Custom Queries tab, you can specify the type of custom queries to display: public, private, or both.

The Inquiry tool appears, and displays a results table containing the type of information that the selected query is designed to find.

4. Use filters and other controls to refine what and how information is displayed:
- Show Grand Totals. Select this option to show grand totals below the results table.
 - Per Page. Choose how many rows appear in the results table.
 - Group by column. To group the rows in the results table by a column, drag and drop the column's header to the purple bar above the table. You can group by only some columns. For columns you can group by, column headers are shaded purple. For other columns, column headers are light grey. If you group by column, subtotals are displayed below each group in the results table.
 - Sort by column. By default, rows in the results table are sorted by the first column (the column at the left side of the table). To change the sort order, or to sort by a different column, click any column header.
 - Column header menus. Each column header includes a menu with the following controls:
 - Columns. Specify which columns appear in the results table.
 - Filter. Set a filter to narrow down the information that appears in the results table. A bar above the table displays all the filters that are currently set.

To clear a single filter, open the Filter menu on a column that has a filter set, and click Clear. To clear all filters, click Clear All Filters (above the table).

In the results table, you can click some transactions and records to drill down and see more information.

The query you are using determines the types of transactions and records to which you can drill down.

For example, when using the Order Entry Invoices query, you can drill down to see invoices in the O/E.

Invoice Entry screen, orders (the source transactions for the invoices) in the O/E Order Entry screen, and customers in the A/R Customers screen.

Tip: You can export data from the results table to a Microsoft Excel file by clicking **Export**. Totals are not included in the exported data.

To look up information using one of the special A/R queries:

1. Open the Inquiry tool in one of the following ways:
 - On the navigation menu, open the A/R Documents query (Accounts Receivable > A/R Transactions > Document Inquiry) or the A/R Customer Documents query (Accounts Receivable > A/R Customers > Customer Inquiry).
 - 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 300 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.

To change or refine your search, change search criteria and then click Apply again.

Tip: In a multi-currency system, you can use the field at the top right of the screen to specify whether to show amounts in the functional currency or in the customer's currency.

Create the custom query

To create a custom query:

1. Open an existing query (either a standard query or a custom query).

Tip: You can open a query from the Inquiry tool on the web toolbar, or by clicking Open Query on any query that is already open.

2. In the results table, use the controls in column headers to show or hide columns, and to specify filters.

3. Click **Save Query**.
4. On the Save Query panel:
 - In the Query Name field, enter a name for your custom query.
 - In the Type field, specify whether the query is public or private. A public query is available to all users. A private query is available only to you.
 - In the Description field, you can enter more information describing your custom query. (This is optional.)
5. Click **Save**.

Your custom query is saved.

About Global search

Global Search is a powerful but streamlined search tool that you can open from the welcome bar at the top of the screen. It allows you to quickly search your entire Sage 300 database for any of the following:

- Transactions

Note: When searching for transactions, you can specify the type of translations you want to find.

- Items
- Customers
- Vendors
- G/L Accounts
- G/L Journal Entries

Important: Before using Global Search for the first time, the Sage 300 ADMIN user must set up Global Search by clicking the **Refresh** button on the Global Search screen. (Only the ADMIN user can do this.) If you have multiple Sage 300 companies, you must set up Global Search in each of your companies.

Refreshing Search Data

The Sage 300 ADMIN user can manually refresh search data to ensure that Global Search finds results from the most current and complete data. You refresh search data by

clicking the **Refresh** button on the Global Search screen. (Only the ADMIN user can do this.)

You can refresh search data only for the company that you currently have open. If you have multiple companies, refreshing search data for one of them does not affect search data for the others.

Refresh search data in the following situations:

- Before using Global Search for the first time.
- After using Database Load to change data in a database.
- After deleting records from a database (for example, with Clear History).
- After changing database settings, such as user name, password, server, ODBC DSN, database name, or changing whether the database uses security.

Tip: After changing or adding data, it may be several minutes before your changes are reflected in Global Search results. You may be able to make changes appear sooner in Global Search results by refreshing search data.

Looking up information using Global Search

Use Global Search to quickly look up transactions and records in your Sage 300 system.

To ensure that Global Search finds results from the most current and complete data, the Sage 300 ADMIN user may sometimes need to manually refresh search data. For more information, see: ["About Global Search" \(page 36\)](#).

To look up transactions and records using Global Search:

1. Click the Search icon at the top of your screen.

The Global Search screen appears.

2. On the list to the left of the search field, select types of transactions or records to find.
3. In the search field, enter a word, phrase, or other text (such as an identifying number) that may be in the transaction or record you are looking for, and then click the Search button to the right of the search field.

A list of results is displayed.

By default, if you enter multiple words in the search field, transactions and records are found if they include any of the words you entered. You can refine this default behaviour by using the following special formatting in the search field:

- Quotation marks. To find an exact phrase, enclose the phrase in quotation marks. For example, if you search for "Please ship promptly", only transactions and records that include the exact phrase Please ship promptly will be found. Transactions and records that include variations such as Please ship soon or Ship promptly will not be found.

Another use of quotation marks is to find text that includes special characters (such as hyphens). For example, to find ABC-123, enter "ABC-123" in the search field.

- Plus sign. To specify that results must include a certain word or phrase, put a + before the word or phrase. For example, if you search for +20233 +"office chair" furniture, every result will include both 20233 and office chair, but may or may not include furniture.

To open a transaction or record in its primary screen, click the transaction ID or record ID in a result.





Tips and Tools

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




Data entry tools

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



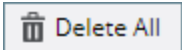
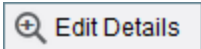
Data entry tools




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

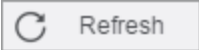
		remove columns from the table of results that appears in the Finder, or to rearrange the order in which columns appear.
--	--	---

Tool	Name	Description
	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.
	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.

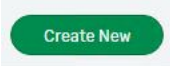
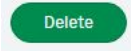

Tools in data entry tablets


Tool	Description
	Click Add Line to add a new line to a detail entry table.
	Click Delete Line to delete a selected line from a detail entry table.
	Click Delete All to delete all line from a detail entry table.
	Click Edit Details to open a popup screen where you can enter and edit information for lines in detail entry table.

	<p>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.</p>
 Edit button	<p>Click the Edit button to open a new screen where you add or edit additional information for a detail. For example, where this button appears in a Taxes column, click the button to edit tax information for the detail.</p>
 (Page navigation) Page	<p>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.</p>

Tool	Description
	<p>Click Refresh to refresh the information displayed in the detail entry table.</p>

Buttons

Button	Description
	<p>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.</p>
	<p>Click Delete to delete the displayed record. If you cannot delete a record, an error message explains why it cannot be deleted.</p>
	<p>Click Print to print a report after you have specified settings and criteria for records to include in the report.</p>

	<p>Click Save to add a new record you have created, or to save changes you have made to an existing record.</p>
---	---

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.
Alt + Down Arrow Alt	<p>Open the Finder for the field you are editing (if there is a Finder for the field). Rarely, this shortcut may not work. If this happens, try the following:</p> <ul style="list-style-type: none"> • Press Tab to select the Finder and then press Enter to open it .

Key	Action
	<p>If you use the Chrome browser, turn off its Autofill feature. For more information, see Sage Knowledgebase article 108348.</p>
Esc	<p>Close Finder pop-up screens and messages This keyboard shortcut may not work for all screens and messages. This keyboard shortcut may not work for all screens and messages.</p>

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.

Keyboard shortcuts for the Finder

Use the following keyboard shortcuts in the Finder to navigate through results and select records.

Key	Action
Up or Down Arrow	Go up or down one row in the table of results.
Pg Up	If the table displays multiple pages of results, go to the previous page.
Pg Dn	If the table displays multiple pages of results, go to the next page.
Home	If the table displays multiple pages of results, go to the first page.
End	If the table displays multiple pages of results, go to the last page.
Enter	Select the record that is highlighted in the table of results. The Finder closes.

Keyboard shortcuts for the navigation menu

Use the following keyboard shortcuts for the navigation menu to move around the menu and open screens.

Key	Action
Tab	Go to the next menu item. Tip: Pressing Tab displays a Skip Navigation Menu button before going into the menu. When this button is displayed, you can press Enter to skip the navigation menu and go directly to any screens you have open.
Shift+Tab	Go to the previous menu item.
Arrow keys	Move around in the menu. Right and left arrows move through the levels of the menu structure (into and out of submenus). Up and down arrows move through the items within a menu or submenu.
Enter Spaces	Open a submenu or screen.
Escape	Close any open submenus and go to the main menu.
Home	Go to the first item in the current menu.
End	Go to the last item in the current menu.

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.

Tip:

- 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.

Example: when exporting data from the Currency Codes screen, the following fields are available:

- Currency Codes
- Description
- Symbol
- Decimal Places
- Symbol Position
- Thousands Separator

- Decimal Separator
- Negative Display

1. Click Add

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

2. In the new column, click Add criteria.

The Create filter for field screen appears.

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

Relational Operators

Symbol	Meaning
=	Equal to
!=	Not equal to
>	Greater than
>=	Greater than or equal to
<	Less than
<=	Less than or equal to
LIKE	<p>Use this operator to find a group of characters or single</p> <ul style="list-style-type: none"> • 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. <p>Tip: To select a field name as the value, select the Set value as field name option. The second field contains a drop down list from which you can select any available field name.</p>

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

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.

