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INTRODUCING SAGE 300 2020

Sage 300 Version 2020 is now available. This new release includes updates to Sage 300cloud web screens, Sage 300 Classic screens, Sage CRM integration improvements, and more. Here's a closer look at enhancements in the latest version.

Sage 300cloud Screens

This release includes enhancements to Sage 300cloud web screens - modernized versions of Sage 300 screens that you can use in a web browser. Here's a quick summary of what's new:

Multiple Browser Tabs - You can now run Sage 300cloud in multiple browser tabs or windows and various screens open at the same time (not previously an option).

New Payroll Employee Timecards Screen - This new web screen allows you to enter and manage employee timecards.

Improved Language Support - French and Spanish characters are now fully supported in all fields.

Tip: [Learn more about using Sage 300cloud Web Screens](#)

Sage 300 Classic Screens

The Sage 300 Help system has been updated so that it's easier to find useful help topics and instructions. Search results are more relevant and include topic excerpts to help you find what you're looking for. In addition, you can now use web search engines to find information in the help and even view topics on any internet-connected device, even if you don't have Sage 300 open. Lastly, help topics are more readable, and the help system has a fresh, modern look and feel.

CRM Integration Improvements

Each new release seems to bring Sage 300 and Sage CRM even more closely together and version 2020 is no exception. Now when you create or change an order entry transaction that is linked to a CRM opportunity, a corresponding communication record is automatically created in Sage CRM. This works whether you create or change the transaction in Sage 300 or Sage CRM. In addition, a hyperlink has been added to Order Entry documents in CRM Communications which, upon clicking a document, opens an Order Entry Inquiry web screen.

Compatibility Note

With the release of Sage 300 2020, Sage is no longer testing any version of Sage 300 for compatibility with Windows 7 which will [no longer be supported by Microsoft](#) after January 14, 2020.



[Contact Us](#) if you have questions about Sage 300 2020 or need help upgrading. Also, refer to the [Sage 300 2020 release notes](#) for other important details not covered in this article.

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6 TIPS FOR A SUCCESSFUL YEAR END CLOSE

- 1. Back Up Your Data** - before you begin any year end process, be sure to execute a complete back up of your database. You should also **test the back up** to ensure it was successful and the data is readable. The only way to “reverse” year end processing is to restore your data from a backup. So do it now!
- 2. Check Your Version Number** - closing procedures can vary depending on the version of Sage 300 (or “Accpac”) you’re currently running. Check your version number and service pack before starting year end processing.
- 3. Create a New Fiscal Calendar** - Sage 300 allows you to begin entering transactions for the new year without closing out the current year. Simply create a new fiscal calendar in **Common Services > Fiscal Calendar** and then click the **New** icon. If the period date ranges are correct, then **Save** the year. Do this before entering transactions for 2020.
- 4. General Ledger Closing** - While it’s a good idea to close modules in a timely fashion, your General Ledger can remain open as long as you need while awaiting final processing (or audit adjustments) in other modules.
- 5. Check Data Retention Settings** - Sage 300 will retain historical data based on your software version and the settings you’ve configured in each module. So it’s a good idea to review all module and system settings to avoid the unintended loss/purge of important data during year end close. In particular, check GL Options to see how many years of history your system is set up to retain.
- 6. Remember, We’re Here to Help** - As you begin year end closing procedures and prepare to start fresh in 2020, be sure to contact us if you need assistance. As your software and technology partner, we’re here to help!

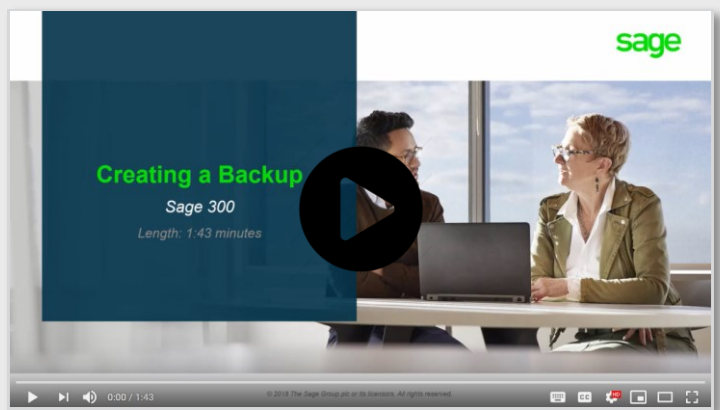
HOW TO CREATE A DATABASE BACKUP IN SAGE 300

One of the most important things you can do before starting the year end closing process is to backup your data.

Here’s how to do it in Sage 300:

1. Click the **Start** button, highlight **Programs**, then **Sage**, and click **Database Dump**.
2. Type the password for the Admin user in Sage 300, then click the **OK** button.
3. Click to highlight the database that you want to Dump. Click the **Set Directory** button to enter the location where you want to save the files.
4. Click **OK**. You’ll return to the Dump Sage 300 Data screen.
5. Click the **Dump** button to proceed. A confirmation message will appear. Click **OK** to continue.
6. A Dataset Description screen will display in which an optional description of the database may be entered. Enter a description, then click **Done**.

Watch this [Sage 300 backup video demonstration](#) on YouTube to see the full process step-by-step.



SAGE 300 YEAR END CENTER

Sage has created a [Year End Center](#) that provides valuable resources that can help guide you through a smooth year end closing process in Sage 300 including:

- Year End Tips, Articles, and Checklists
- Video Tutorials
- Online Q&A and Discussion Forum
- Live Chat With Tech Support
- Tax Forms, Payroll, and Reporting Guidance
- Product announcements and year end tax updates

Take advantage of this free and valuable resource!

[Visit Year End Center!](#)

REVIEW YEAR END CHECKLISTS

Checklists are great for helping you keep things on track and to ensure processes are executed in the right sequence. Here's how to access year end processing checklists that are built right into Sage 300:

Newer Versions of Sage 300:

1. Logon to your Sage 300 system
2. From the Task Ribbon, click **Help** then **Product Documents**
3. Browse the version of your product, then select **Checklists**
4. Click the link called **Year-End Procedures**

Older Versions of Sage 300:

1. Logon to your Sage 300 system
2. From the menu bar, click **Help** and then **Documentation**
3. Browse the **ENG** folder
4. Find the PDF called **Sage300ERP_Checklist_YearEnd.pdf**

SAGE 300 PAYROLL FAQs AND TUTORIAL VIDEOS

For companies running the payroll module, here are answers to frequently-asked questions along with some helpful instructional videos to help prepare for year end.

When do I close the payroll year?

You never close the year. Continue processing payrolls as you do all year long, entering period-end dates in the new year as you cross the calendar year boundary.

After you have completed all of the previous year's year-end processing and made backup copies of the data, you can run **Delete Inactive Records** to remove terminated employees and other obsolete information from your data.

Can I produce W-2s (U.S.) or T4s (Canada) after processing payrolls for Jan 1?

Yes. The program allows you to start processing payrolls for Jan 1 and later produce W-2s/T4s for the previous year without any additional procedures. When you produce W-2s/T4s, select previous year as the Payment Year.

Is there a limit to the number of W-2s or T4s that can be printed?

No. You can print the W-2 forms or T-4 slips as many times as you need.

Helpful Links and Videos:

[Sage 300 Payroll Updates](#) (Downloads Page)

[How to Download and Install Payroll Tax Updates](#)

[How to Print W-2 Forms](#) (U.S.)

[How to Print T4 Forms](#) (Canada)

RECOMMENDED REPORTS TO PRINT FOR YEAR END

After year end closing is completed, it's a good idea to print and keep the following recommended reports that provide an overview of year end closing transactions as well as your company's financial status:

Batch Status

Shows all of the activity that has taken place during year end closing, including the number of transactions and the total debits and credits posted.

Posting Journals

An audit trail of all the transactions posted for year end.

Balance Sheet

This critical reports shows the company's assets, liabilities, and shareholder's equity, and opening balances carried over from the previous year.

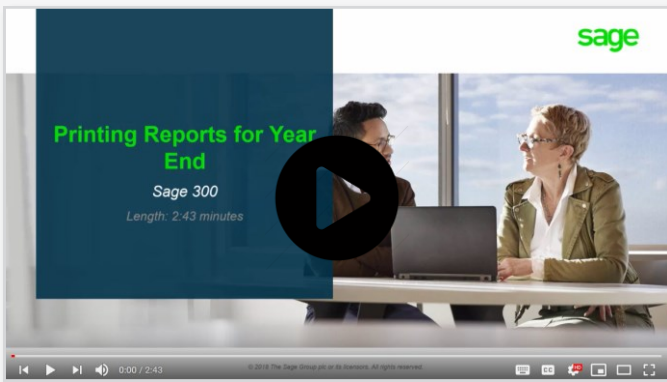
Trial Balance

Shows all the opening balances for the new year. Note that all the income statement accounts should display as zero.

Transactions Listing

This report reveals all entries posted to the G/L, including all net changes, balances, and transaction details for all accounts within the range of the fiscal year.

Video: Instructions for Printing These Year End Reports



HOW TO START A NEW YEAR IN SAGE 300

Here's an overview of the process for starting a new year in Sage 300 which includes several steps as follows:

1. Users log out

Verify that all users are logged out of the system.

2. Create a backup of your data

Refer to the instructions and on page 2 of this newsletter.

3. Create a new fiscal year

If desired, you can also [lock fiscal periods](#). Creating a new year in Common Services allows you to start posting transactions to the new year.

4. Check data integrity

Use the [Data Integrity tool](#) to check for errors in your data.

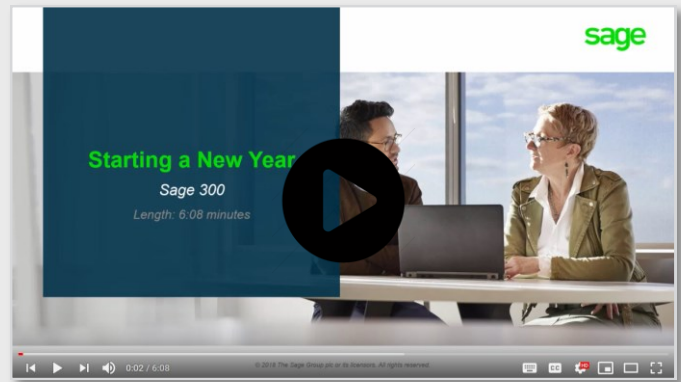
5. Complete year end in A/P (Optional)

If you want to reset the batch number for Accounts Payable, you'll need to perform a year end in A/P after posting all transactions for the current year, and before posting transactions for the new year.

6. Complete year end in A/R (Optional)

Similar to A/P, you'll need to perform a year end in A/R if you want to reset the Accounts Receivable batch number.

Video: Instructions for Starting a New Year



How to Change GL Accounts That Were Set Up Incorrectly

During year end processing, some companies discover that certain GL accounts were incorrectly set up using the wrong **Account Type**.

For instance if Income Statement accounts were set up as Balance Sheet accounts, these accounts would not close to Retained Earnings after running Create New Year. In other words, the accounts would still have a beginning balance in the new year.

If you find yourself in that situation, here's how to resolve it.

1. Ensure the option **Allow Posting to Previous Years** is selected.
2. Create a new GL account with the correct Account Type (Income Statement).
3. Create a GL entry to transfer the balance from the old account (Balance Sheet) and into the new Income Statement account.
4. Select period 12 and the fiscal year in which the entry is intended to be posted.
5. Mark the old Balance Sheet account as **Inactive** so no additional entries can be posted to this incorrect account.
6. Repeat steps 2 through 5 for each account that was set up incorrectly as a Balance Sheet account.

NOTE: Do not run the Create New Year function again. The system will recognize the entry is posted to a prior year and will update the Retained Earnings account.



Be sure to get in touch if you need help with this or any other issue with your Sage 300 software.

HOW TO EDIT 1099 VENDOR CODES OR AMOUNTS

At some point during year end processing, you may discover that the 1099 codes or amounts you've recorded for a vendor need to be edited or adjusted.

To Change a 1099 Code:

1. Go to **A/P Vendors** and select **Vendors**
2. Select the vendor with the issue
3. Click on the **Invoicing** tab
4. Choose the **correct** 1099 code
5. Click on **Save** and then **Close**

To Allow Editing of 1099 Amounts:

1. Go to **A/P Set Up** and select **Options**
2. Select **Transactions** Tab
3. Check of **Allow Edit of 1099/CPRS Amounts**
4. Click **Save** and then **Close**

To Update a Vendor's 1099 Amount:

1. Go to **A/P Vendors** and choose **A/P 1099/CPRS Inquiry**
2. Filter to **Vendor(s)**
3. Filter to the incorrect 1099 Code
4. Click on the double arrows (**Go option**)
5. Note the information for all entries listed
6. Filter to the correct **1099 Code**
7. Click on the double arrows (**Go option**)
8. Press the **Insert key** to add a new line
9. Enter the appropriate information for the detail line
10. Repeat the previous 2 steps for each detail line
11. Filter to the incorrect 1099 Code
12. Click on the double arrows (**Go option**)
13. Press the **Delete key** to remove the incorrect detail lines individually



SAGE 300cloud Vs. Sage 300 Classic

What's the Difference?

Like some customers, you're probably wondering what's the difference between Sage 300 "Classic" (formerly Sage Accpac) and Sage 300cloud. And more importantly, whether it makes sense to migrate to the newer product. In this article, we'll help answer those questions.

The Major Differences

We'll start by explaining a couple of major differences. First, Sage 300cloud is based on subscription pricing which means you pay-as-you-go, as opposed to the larger upfront perpetual license and maintenance costs of Sage 300 Classic. Second, Sage 300cloud features a more modern interface that's easier to use, customize, and access in a web browser. Lastly, Sage 300cloud integrates with an ecosystem of cloud-connected apps that significantly expand features and system capabilities.

Expanded Functionality

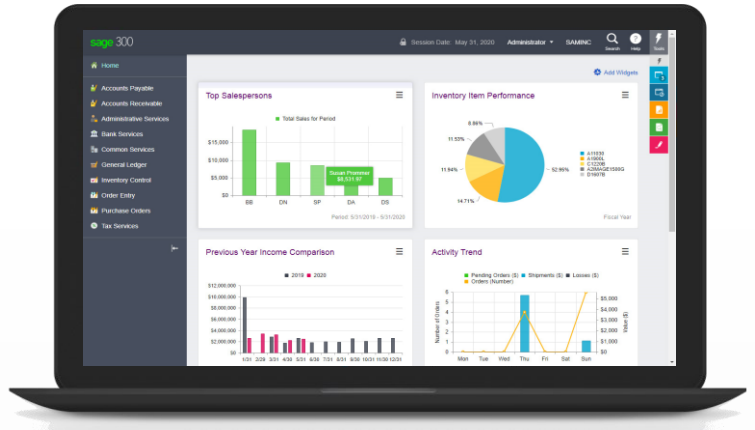
While the core modules like General Ledger, Accounts Receivable, Purchasing, and Inventory function similarly in both products, Sage 300cloud offers a collection of added features **and** integrates with cloud apps that aren't available with Sage 300 Classic. Here's a look at just a few:

Sage Inventory Advisor Basic

Connects to your Sage 300cloud data to help you reduce forecasting time, optimize inventory levels, streamline purchasing, and achieve optimal fill rates.

Enhanced Sage CRM Integration

Tighter integration with Sage CRM includes more bi-directional synch options and enhanced workflows.



Sage AP Automation

An integrated AP automation suite designed to simplify and remove paper and manual tasks from processing, approval, and payment of accounts payable invoices.

Added Functionality

Additional modules and functionality in Sage 300cloud that's not available in the classic version includes:

- Modernized web screens
- Global database search
- Customized inquiries
- AP Withholding and reverse charges
- Notes feature

Other Questions About Sage 300cloud?



[Contact us](#) if you have more questions about what makes Sage 300cloud different or to learn more about migrating from Sage 300 Classic.

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