



Datasheet

What's New in Sage 300 v2024.1

Get increased flexibility and compatibility needed for today's business.

Sage

Better User Experience

Advanced Capabilities & Flexibility

Greater productivity

Improved efficiency

Less training/retraining

Gain better business insight

Higher employee satisfaction

Less workarounds/manual process

What's new in 2024.1

Released November 2023

New Project and Job Costing Web Screens

New web screens now include the budget maintenance screen to forecast revenues and costs over several fiscal periods to budget your contracts effectively.

AP 1099 Forms Through Aatrix Integration Improvements

Added 1099-DIV form type including amount types and five new fields when 1099 Tax Reporting is selected which are first name, last name, FATCA checkbox, second TIN notice checkbox, and tax withholding state. With these changes you will be prompted to activate AP module the first time you log in to a company.

New link to Help and Sage Support

Look for new link on the Sage menu for [resource centre](#).

What's new in 2024.0

Released September 2023

New Project and Job Costing Web Screens

New web screens include, equipment usage, adjustments, timecards, transaction history, and transaction history report.

Purchase Order Web Screens

Updated to allow for entry of job-related documents in PO transaction screens.

Financial Reporter for the Web

Financial Reporter (FR) is used to manipulate, format, present and print general ledger (GL) data. FR uses Microsoft Excel to create financial statements and statement specifications that display data from the GL.

Note: Sage Intelligence Report Cloud (SIRC) has been deprecated with the introduction of

Financial Reporter for the Web.

Updated APIs

Web APIs have been added for US Payroll employee and IC Item location details.

Banks Feeds

Updated to include US Banks that allow for direct API connections such as Bank of America CashPro.

What's new in 2023.1

Released December 2022

New User Activity Report

Available for Sage 300 administrative users using the desktop screens. The report creates a log of user activities including login/logout, open/close screen, and eviction. In addition to the log the report includes the following columns date and time, company ID, action, platform, screen ID, screen name, and computer name.

1099 Forms through Aatrix

Aatrix e-filing of 1099-NEC, 1099-MISC and 1099-INT will be supported in v2023.1 (PU1), v2022.4 (PU4) and v2021.7 (PU7). There is no change in terms of functionality for setup and processing of 1099 codes or amounts. To learn more, watch our recorded webinar [here](#).

New web screens

New Project and Job Costing web screens including account sets, charges, update retainage and revise estimates are now available. This release also includes new web screens for bills of material and assemblies/disassemblies within the Inventory Control functionality of the solution.

What's new in 2023.0

Released September 2022

Complete web screens for GL, AP, AR, CS and AS

Web screens run parallel with desktop screens ensuring that there is no need choose between desktop or web. Everyone within the organization can use the interface that best suits their needs, while working seamlessly with a single shared set of company data.

Improved CRM integration

Users can now relink a CRM company to an unmatched Sage 300 record. The following A/R customer screens in CRM now uses the current date by default instead of the Sage 300 session date:

- Statistics – Fiscal Period and Fiscal Year fields
- Comments – Date Entered field

- Credit status – Age as of field

Security update

Users now have the option to require complex passwords that must include a lower-case letter, upper case letter, number, and a special character. Additionally, there have been technical upgrades and enhancements to improve overall security.

What's new in 2022.2

Released April 2022

Project and Job Costing integration for A/P Payments, A/P Adjustments and A/P Recurring Payments *(for Sage 300cloud only)*

Users can now enter and work with job-related documents on all A/P transaction entry screens. A/P Batch Listing Report now includes a 'Show Job Details' option for Batch Type: Invoice, Payment, and Adjustment. Users can apply payments to projects maintained in Sage 300 Project and Job Costing and allocate partial payments and/or recurring payments to different contracts and projects listed on the invoice.

Vendor tax numbers are now more secure

In Accounts Payable, Tax numbers for 1099 and T5018 Tax Reporting such as SIN (Social Insurance Number - CA) or SSN (Social Security Number – US) are now more secure.

- By default, tax numbers now cannot be entered or changed, and are masked so that only the last four characters in the number are displayed.
- Options for Printing and Electronic Filing for 1099/1096 forms and T5018 (CPRS) are not accessible by default.

Passwords are more secure

User passwords are now more secure. A new required complexity option requires that passwords include at least one of the following:

- Lower case letter
- Upper case letter
- Number
- Special character (such as * or #)
- Minimum length of 8 characters (required in addition to any one of the above)

Other Updates

- Accounts Payable now supports 1099 tax reporting requirements for tax year 2021.
- Email documents can now be sent using Microsoft 365.
- Test emails can now be sent using Microsoft Outlook. *(For Sage 300 only)*

What's new in 2022.1

Released November 2021

Project and Job Costing integration with AP Invoice

While creating an AP invoice, users can now use the new checkbox to make the invoice job-related. This option would change the grid from regular fields to job-related fields (Contracts, Project, Resource, etc.) that will ensure that once the invoice is created, the corresponding Project and Job Costing module is updated automatically.

UX improvements for Web screens

- New 'navigation' buttons on key fields that can be used to move to the first/previous/next/last records.
 - Record navigation - Record controls allow moving forward and backward one record at a time or through several records as in the desktop UI.
- Sign-on page significantly improved to be more consistent with the other Sage solutions:
 - Sign In button will be disabled while the company details get loaded
 - Spinner indicator will indicate slow network
 - Improved messaging for errors and password changes

Improved Process for Printing Custom Crystal Reports

The new printing process for web screens that was released with the Sage 300 2021 version is now extended to custom crystal reports that would result in less server crashes and improve overall performance during printing custom reports.

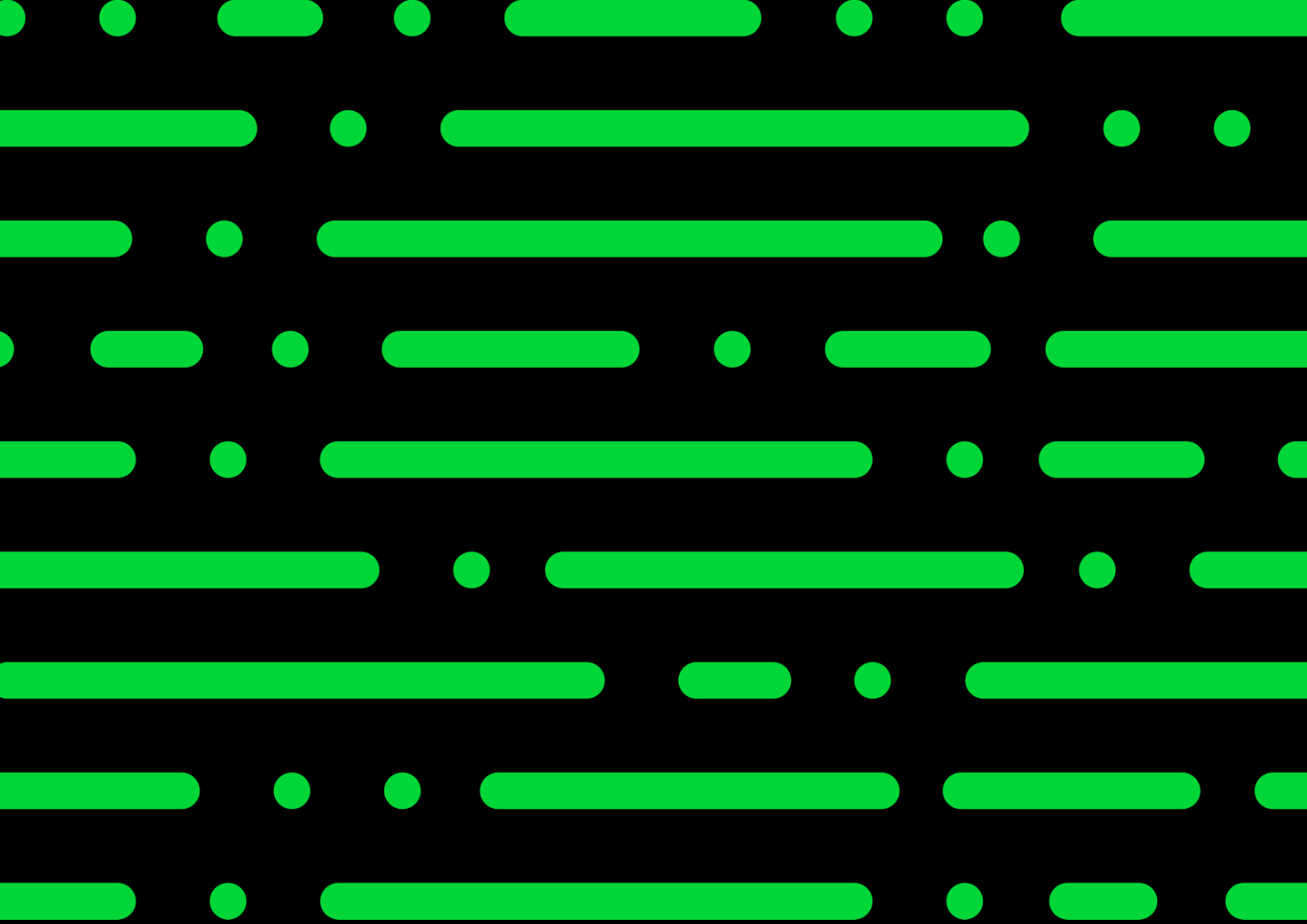
When printing a report, a preview of the report will no longer be displayed in the SAP Crystal Reports® viewer. Instead, the Export Report screen appears and provides options for saving the report to a file. To print a physical copy of the report, users will now have just save it to a PDF and print.

Web API improvements

Provide better error messaging so developers have a better understanding of what the error is. This would improve satisfaction of developers creating customizations and extensions with our ISV community.

Finder support for 64-bit Financial Reporter

Finders in Financial Reporter now work when using Microsoft Excel 64-bit.



For more information on Sage 300 2024.1 and how to upgrade, please contact your Sage business partner. For more details on this release and documentation, please visit [Sage 300 Release Notes](#).

[sage.com](https://www.sage.com)

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