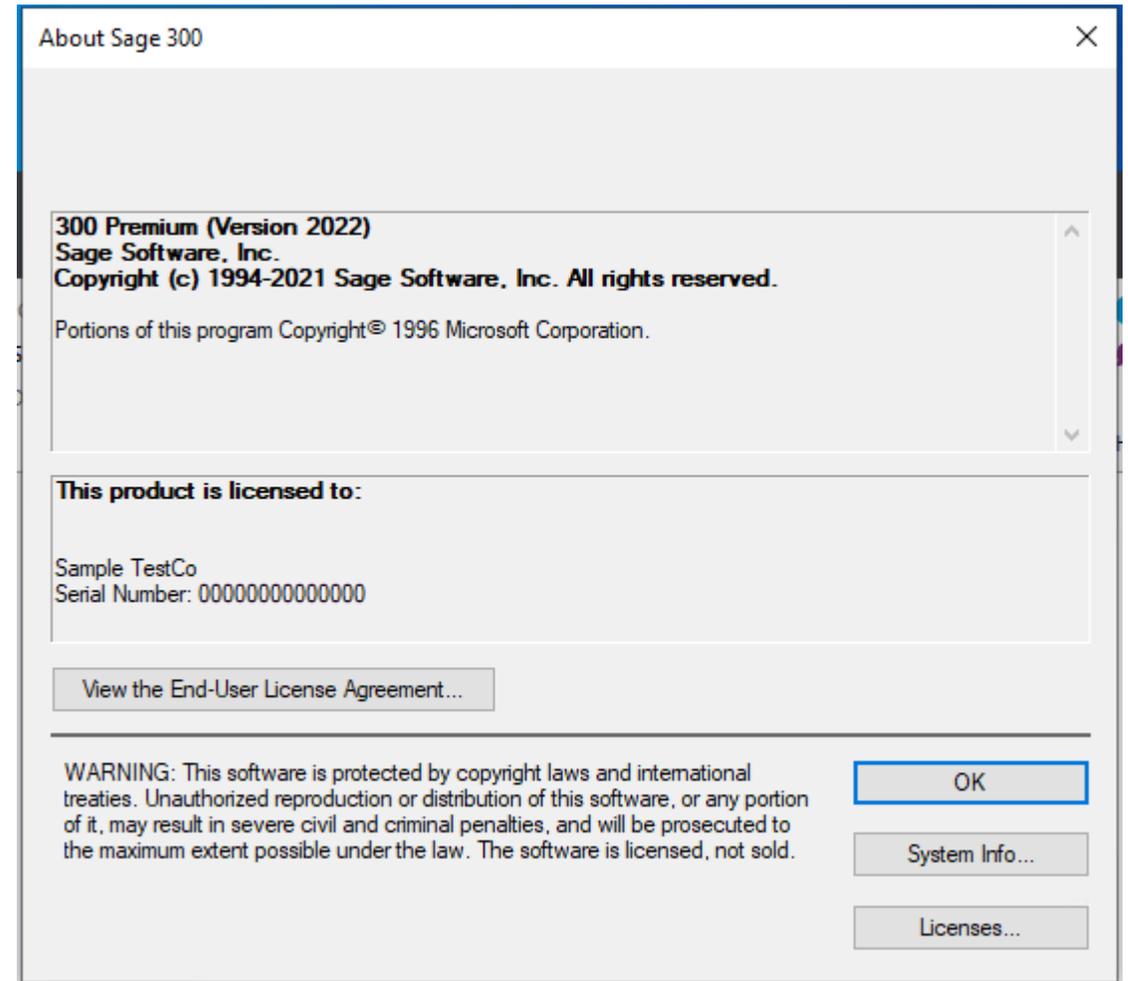
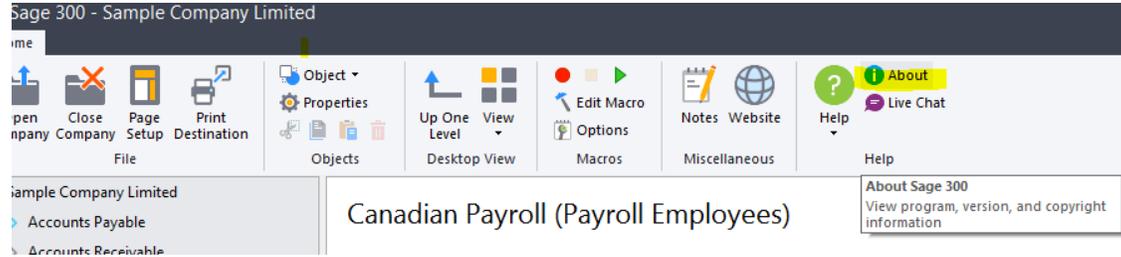




sage

Sage 300 Tips and Tricks

About Sage 300



About Sage 300



The screenshot displays three overlapping windows from the Sage 300 software interface:

- About Sage 300:** Shows the product name "300 Premium (Version 2018)", the developer "Sage Software, Inc.", and copyright information. It also includes a license notice: "This product is licensed to: Sample Co, Serial Number: 77774444111125".
- System Information:** A dialog box showing system details:
 - System Manager Version: 2018 (300 Premium) (Build 20) (Product Update 2)
 - Program Directory: c:\Sage300_2018
 - Shared Data Directory: c:\SharedData
 - Applications table:
- Sage 300 License Manager:** A window for managing licenses, currently on the "License Information" tab. It contains fields for Client ID (1530278), Company (Sample Co), Licensed, Dealer, C.C., and Serial Number (77774444111125), each with a "Change" button. There are also "Refresh" and "Close" buttons at the bottom.

ShortCut Keys



- Use Tab and Shift-Tab to cycle between Sage 300 fields
- F1 - Help
- F4 – Displays Calendar
- F5 – Finder
- F7 – Activate GO button
- F9 – Activate ZOOM
- ALT – activates appropriate shortcut
- + - activates calculator (when pressed in any numeric field)

Shortcut Keys - Calculator



The screenshot displays the 'SAMLTD - G/L Journal Entry' window. The interface includes a menu bar (File, Settings, Help) and several input fields: Batch Number (000196), Batch Description, Entry Number (00001), Entry Description, Document Date (08/21/2020), Posting Date (08/21/2020), Year/Period (2020-08), Source Code (GL-JE), and Entered By (ADMIN). The Entry Mode is set to 'Normal'. A table below shows a single entry with the following data:

Lin...	Reference	Description	Account	Account Description	Currency	Source Debit
1			1200	Investments, short term	CAD	0.00

At the bottom, there are fields for Debits (0.00) and Credits (0.00), and buttons for Add, Delete, Post, Clear, and Detail... A 'Calculator' window is overlaid on the bottom right, showing the number 123 in the display and a numeric keypad.

Finder - Start on Filter



Finder - Employees

File Key Settings **Global Settings**

Find By: Employment **Go to Filter First** Find Now Set Criteria
= Auto Search
Filter:

Employee	Last Name	First Name	Middle Name	Pay Frequency	Employment Status
100050	Haley III	John	Rees	Weekly	Active
100100	Dolite	Theodore		Monthly	Active
100200	O'Dade	Alan		Monthly	Active
100300	MacHeath	Fetch		Monthly	Active

Set Criteria

Set Criteria - Employees

Column: Employee Add Delete

Field: Employment Status

Criteria Or

Employment Status

Set Value as field name

Active

OK Cancel

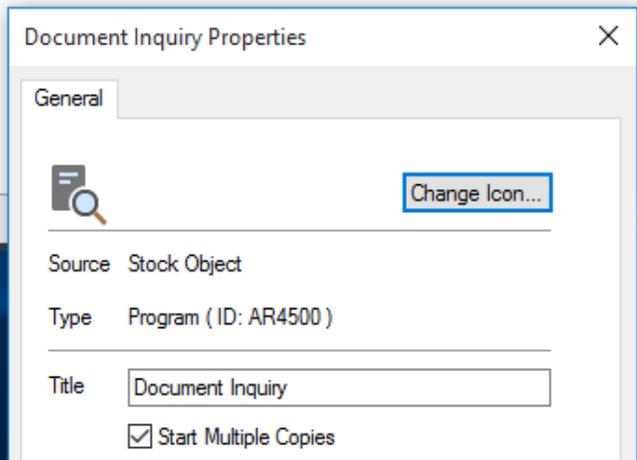
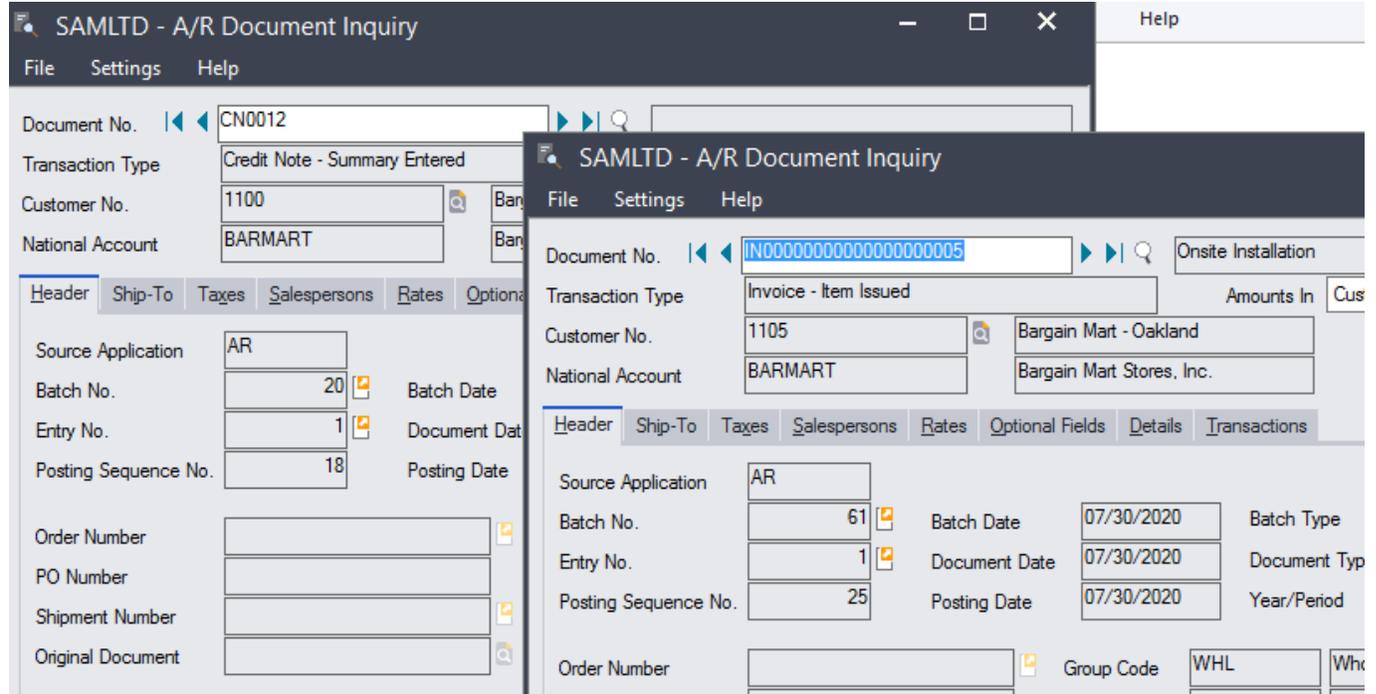
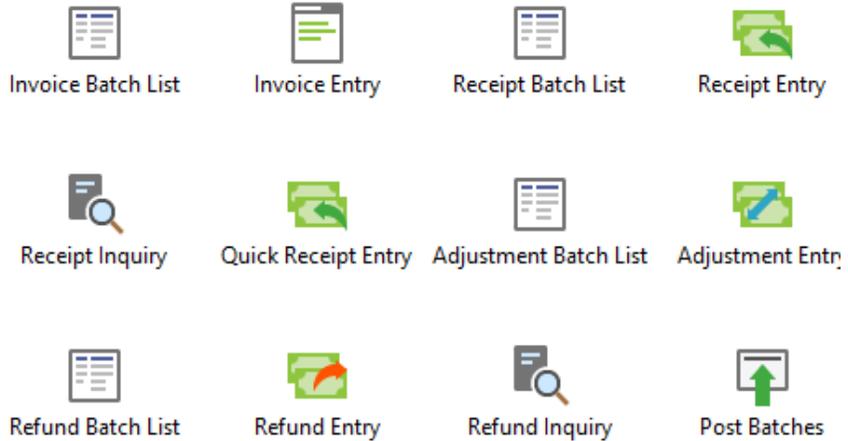
Show Filter Clear... Edit Save OK Cancel

Start Multiple Copies of Programs



A/R Transactions (Document Inquiry)

Licensed to: , Sample Co
Dealer:
CC:



Who is using Sage 300



- Help | Current Users...

The screenshot shows the Sage 300 software interface. The main window is titled "Sage 300 - Sample Company Limited" and is running as "Administrator". The "Home" ribbon is active, and the "Help" dropdown menu is open, with "Current Users..." selected. A tooltip for "Current Users" explains that it is used to view license use and currently signed-in users.

The "Current Users" window is open, showing a table of active users. The table has columns for User Name, User ID, E-mail, Phone, Company, Screen ID, and Screen Name. The "Show screens users have open" checkbox is checked. The table lists three users: Administrator (ADMIN), Mary (MARY), and two instances of Sample Co Ltd.

User Name	User ID	E-mail	Phone	Company	Screen ID	Screen Name
Administrator	ADMIN			Sample Co Ltd	AS9010	Desktop
Mary	MARY			Sample Co Inc	AR1300	A/R Customers
				Sample Co Inc	AS9010	Desktop
				Sample Co Ltd	CP1400	Payroll Employee

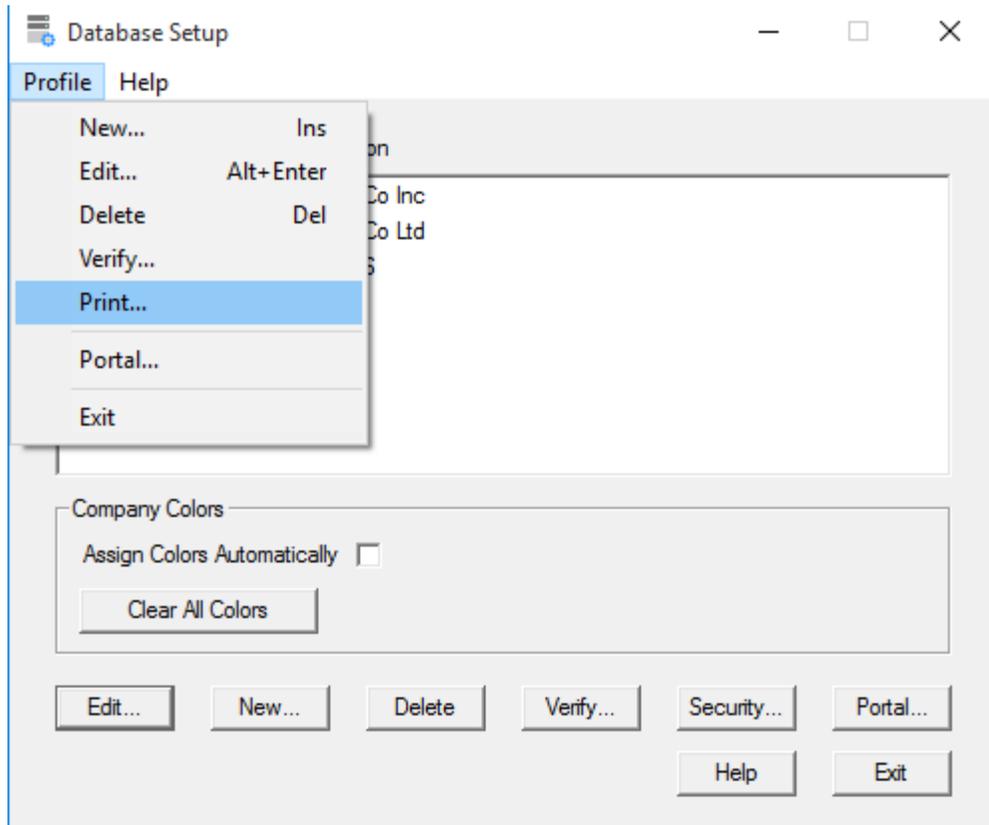
Which Company am I using



The image shows two overlapping windows from Sage 300. The background window is 'Edit SQL Server Database Profile' for 'SAMINC' (Sample Co Inc). It shows the 'Data Source / Server' section with 'Data Source' set to '10.152.11.113' and 'Server' set to 'demo3'. The 'Login ID' is 'sa' and the 'Database' is 'SAMINC'. The foreground window is a 'Color' selection dialog, showing a grid of basic colors and a color spectrum. The selected color is yellow, with RGB values: Hue: 40, Sat: 240, Lum: 120, Red: 255, Green: 255, Blue: 0.

The image shows the Sage 300 user interface for 'Sample Company Limited' (Administrator). The interface is split into two panes. The left pane shows the 'Sample Company Limited' profile with a grey header and a list of modules: Accounts Payable, Accounts Receivable, Administrative Services, Canadian Payroll, Common Services, General Ledger (Financial Reporter, G/L Accounts, G/L Periodic Processing, G/L Reports, G/L Setup, G/L Transactions). The right pane shows the 'Sample Company Inc.' profile with a yellow header and a list of modules: Accounts Payable, Accounts Receivable, Administrative Services (highlighted), Common Services, General Ledger, Intelligence Reporting, Inventory Control, Order Entry, Project and Job Costing, Purchase Orders. Below the panes, the 'Administrative Services (Users)' section is visible, showing 'Licensed to: , Sample Co', 'Dealer:', 'CC:', and icons for 'Users' and 'Security Groups'.

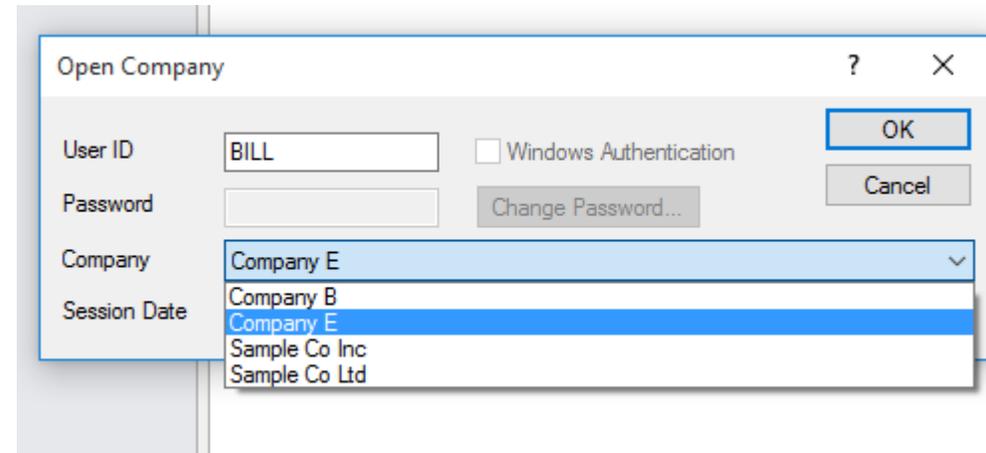
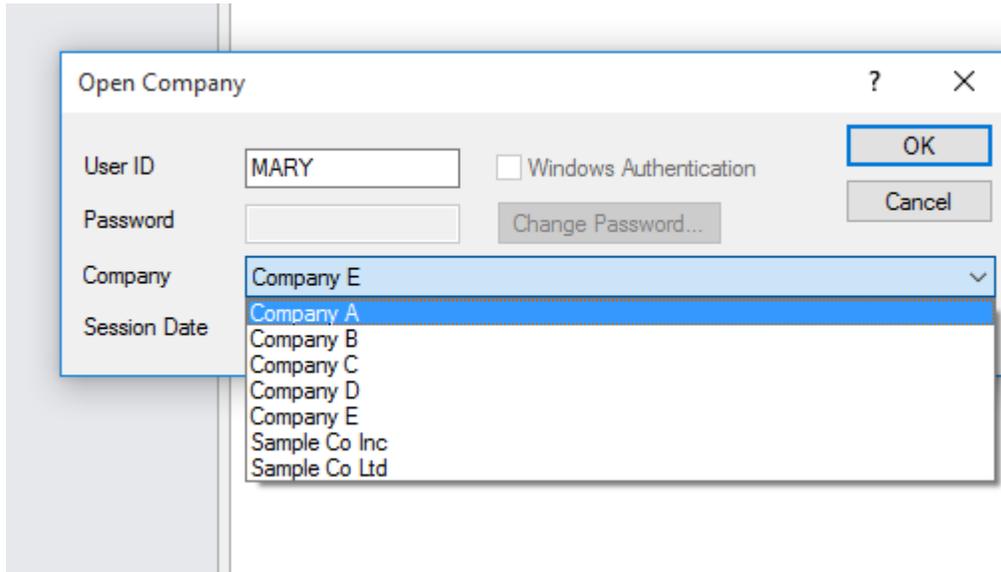
Print List Of Companies that are setup



Restrict List Of Companies



Further info see KB 87424



Restrict List Of Companies



Sign In to Sage 300

MARY

Company B

Company A

Company B

Company C

Company D

Company E

Sample Co Inc

Sample Co Ltd

Sign In to Sage 300

BILL

Sample Co Ltd

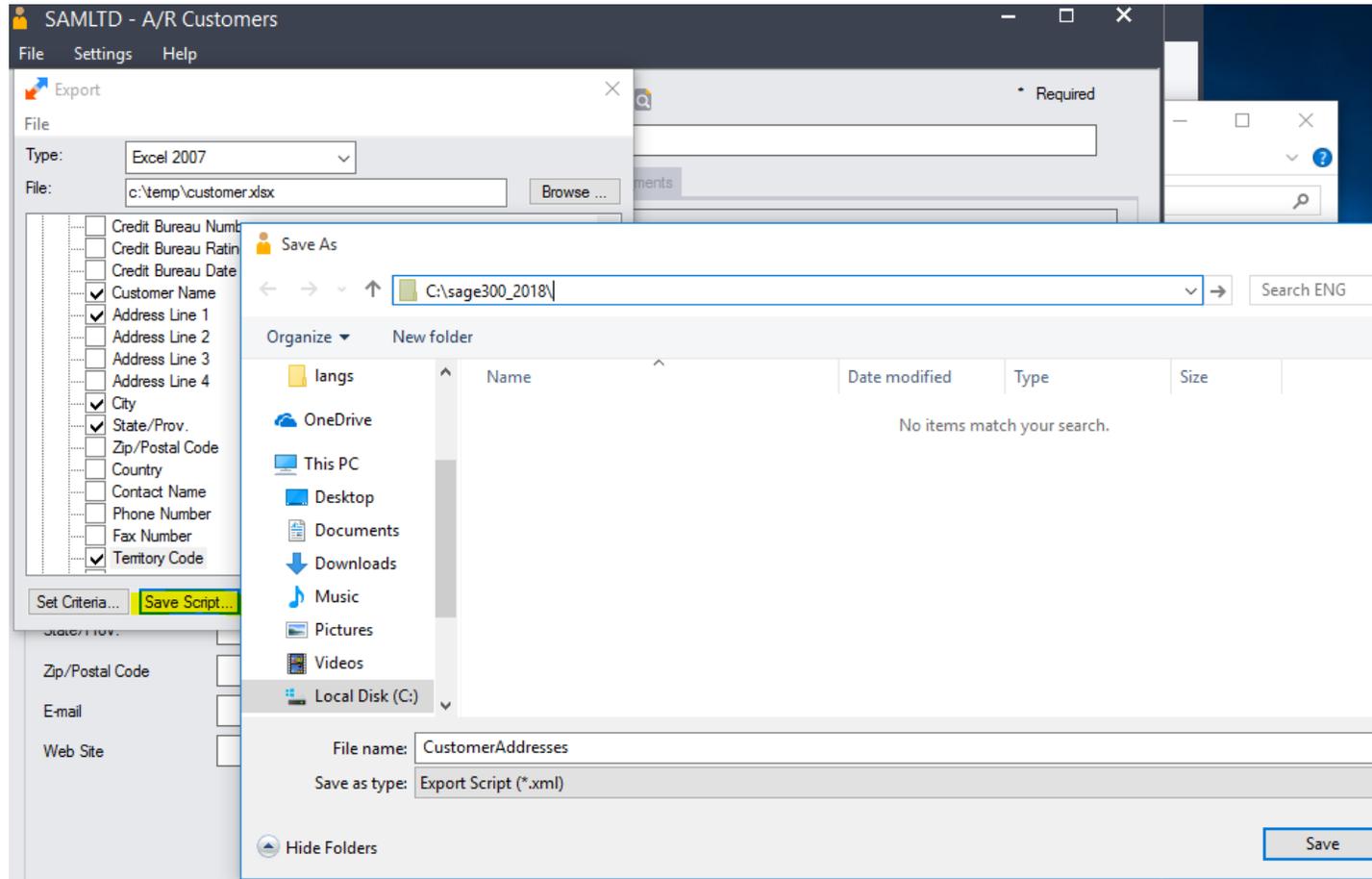
Company B

Company E

Sample Co Inc

Sample Co Ltd

Getting Data from Sage 300 – Export Script



Payroll Check Export



Further info see KB 90019

Payroll Setup (Check Transactions)

Licensed to: Sample Co.

SAMLTD - Payroll Cheque Exporter

Use this tool to export payroll cheque data to a file. Filter which cheques are included by specifying criteria below.

Cheque Date: From / / To 05/07/2020

Employee: From To

Sort Exported Data By Employee Number

Include Accrual Payments

Specify a file name and location below before exporting.

File Name: SAMLTD-Export.csv

File Path: C:\Temp\AprPayroll

	A	B	C	D	E
1					
2					
3	Employee ID	Cheque Date	Earning	Sum of Amount	
4	100020				
5		2/1/2019			
6		HOURLY		96.00	
7		WIDGET		5,718.00	
8		2/1/2019 Total		5,814.00	
9		1/13/2020			
10		HOURLY		600.00	
11		1/13/2020 Total		600.00	
12		1/20/2020			
13		HOURLY		1,200.00	
14		1/20/2020 Total		1,200.00	
15		1/27/2020			
16		HOURLY		600.00	
17		1/27/2020 Total		600.00	
18		2/3/2020			
19		HOURLY		600.00	

Getting Data into Sage 300 - Import



Import Templates, found in [Sage300\SharedData\ImportTemplates](#)

The screenshot shows the Sage 300 software interface. The top bar displays "Sage 300 - Sample Company Limited" and "Administrator". Below this is a ribbon with various options like "Open Company", "Close Company", "Page Setup", "Print Destination", "Object Properties", "Up One Level", "View", "Edit Macro", "Options", "Notes Website", "Help", "About", and "Live Ch".

The main window shows a file explorer view of the "ImportTemplates" folder. The address bar indicates the path: "This PC > Local Disk (C:) > SharedData > ImportTemplates". The file list is as follows:

Name	Date modified	Type	Size
APCreditNote1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	14 KB
APDebitNote1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	14 KB
APIInvoice1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	13 KB
ARCreditNote1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	20 KB
ARCustomer1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	17 KB
ARInvoice1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	21 KB
CPEmployee1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	21 KB
CPTimecard1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	15 KB
GLBasicAccountProfile1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	16 KB
GLJournalEntry1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	16 KB
ICItem1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	14 KB
ICReceipts1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	14 KB
OECreditNote1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	14 KB
OEOrders1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	20 KB
POReceipt1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	21 KB
PORequisitions1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	13 KB
UPEmployee1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	21 KB
UPTimecard1.xlsx	4/6/2018 12:00 AM	Microsoft Excel W...	13 KB

Crystal Reports – how to Customize Datapipe



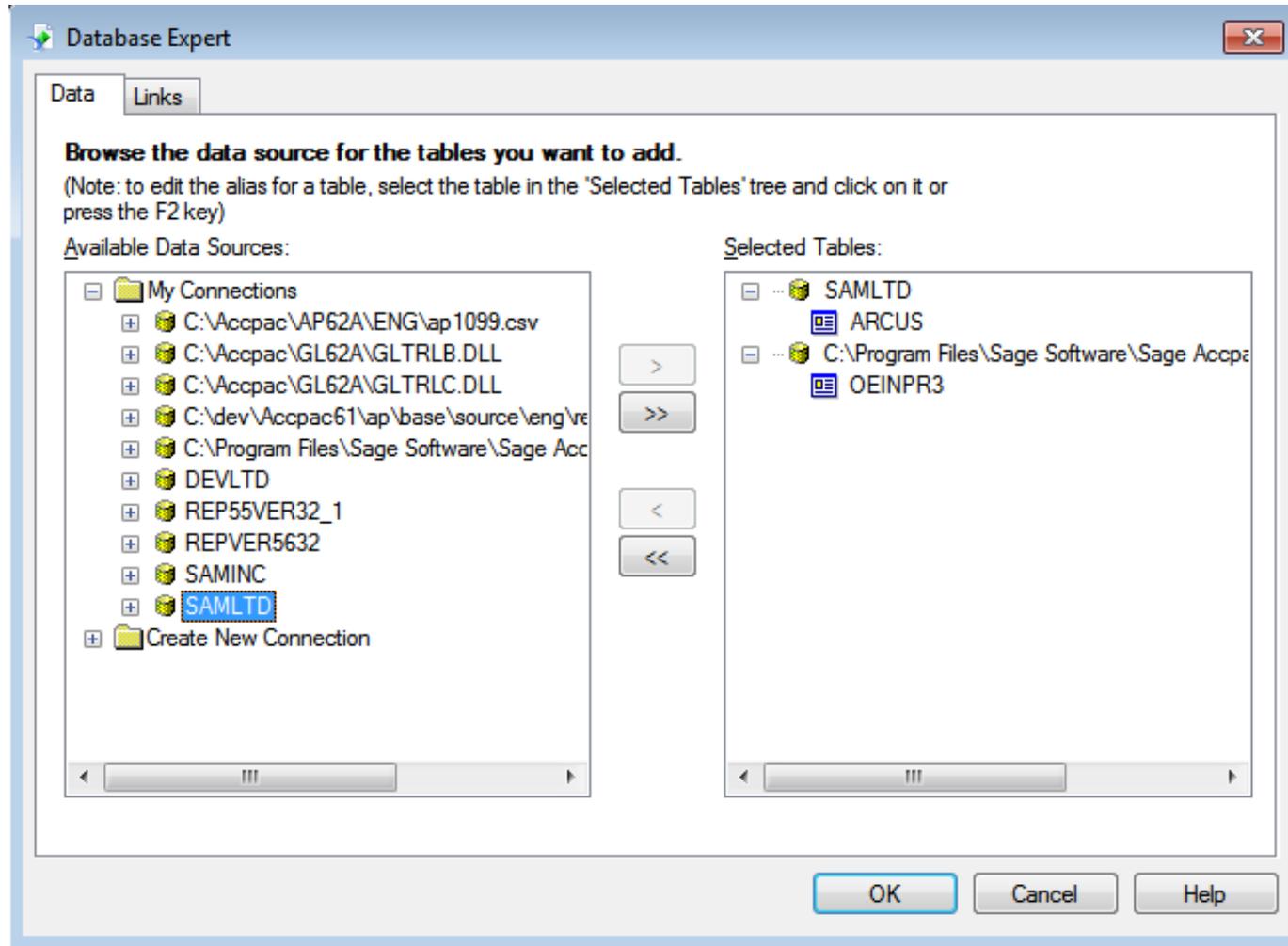
- How to customize Data Pipe Reports, e.g. Adding Customer Name (ARCUS.NAMECUST) to OEINV01.RPT...
- Refer to KB 19704, download the datapipe patches, and copy them to the appropriate folders, without them datapipe type won't appear in "Create New Connection"

Crystal Reports – how to Customize Datapipe

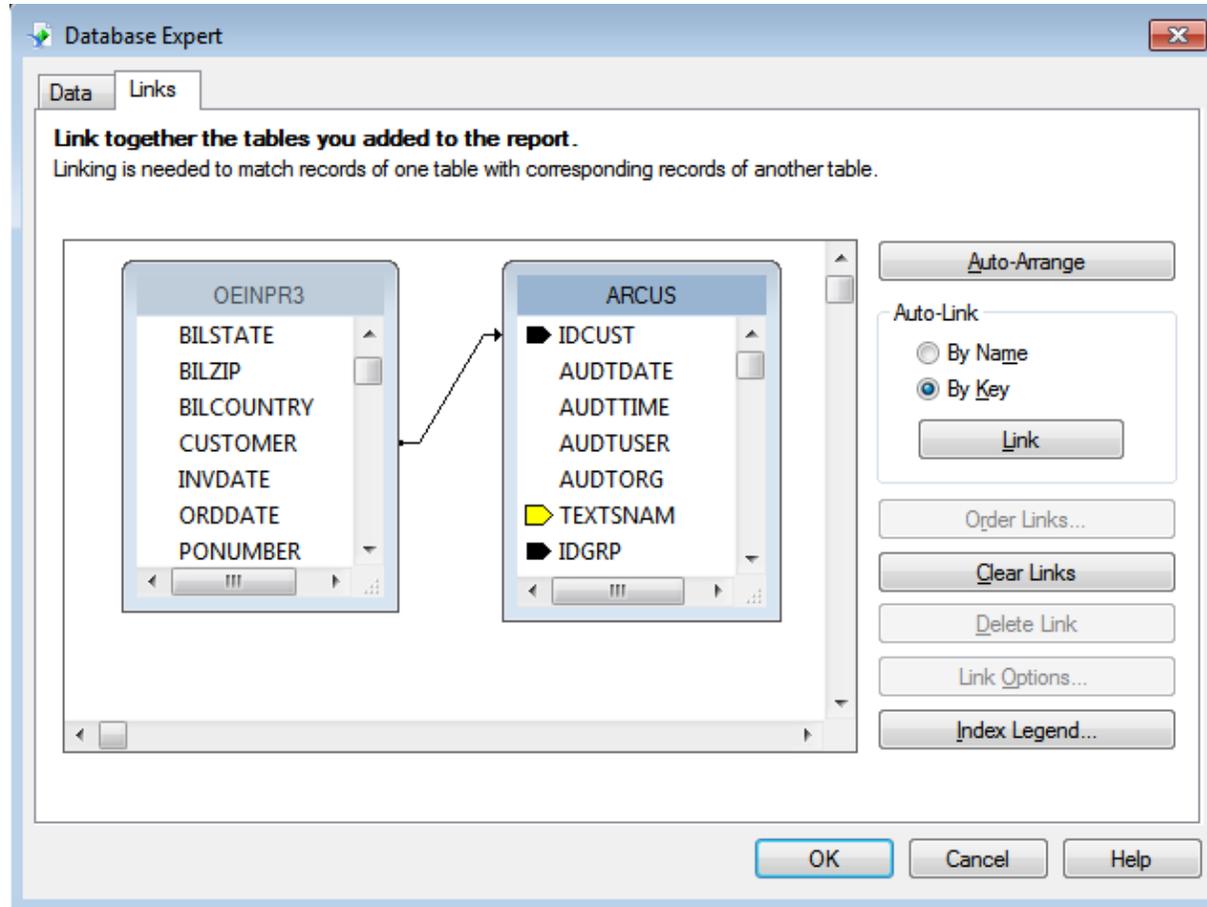


- In the module-specific DATAPIPE.INI, the P1 parameter (database name) of the datapipe DLL must exist to avoid errors when verifying the database in Crystal Designer.
- Using Crystal Report Designer, in “Database Expert” add ARCUS table and link it to the datapipe table (OEINPR3)

Crystal Reports – how to Customize Datapipe



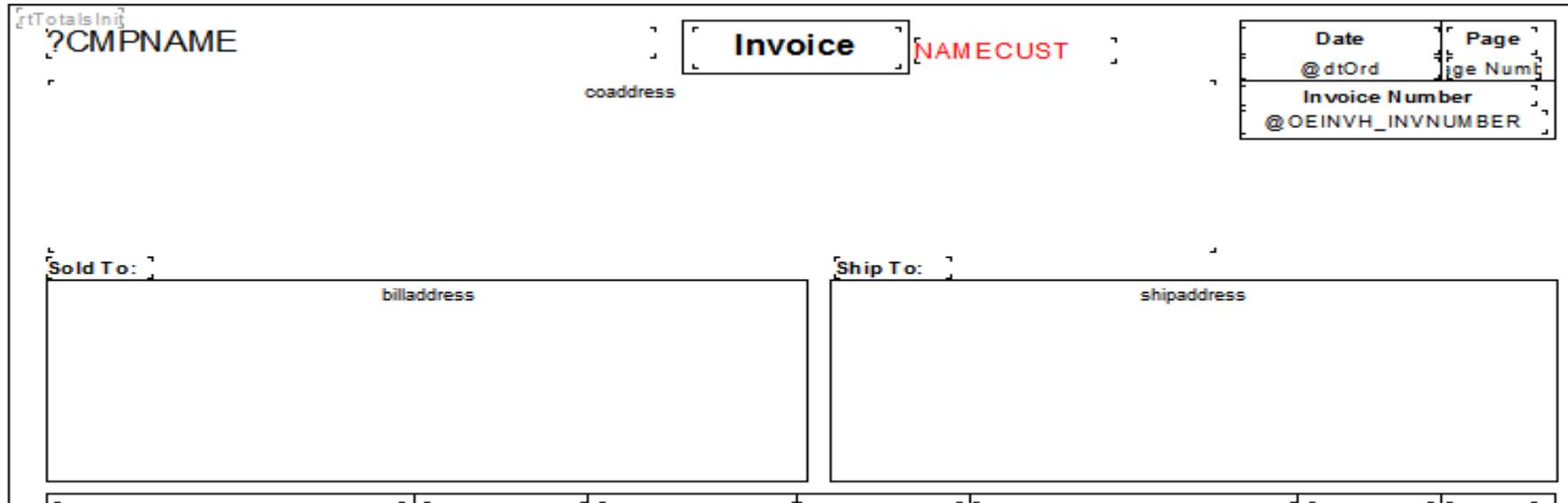
Crystal Reports – how to Customize Datapipe



Crystal Reports – how to Customize Datapipe



- Add ARCUS.NAMECUST to OEINV01.RPT



Crystal Reports – how to Customize Datapipe



Sample Company Inc.		Invoice	Mr. Stephen Kershaw		Date	Page	
123 Sample Company Plaza Any City, Any Province, 12345 USA Phone: (123) 456-7890 Fax: (123) 456-7891					Jan 15, 2019	1	
				Invoice Number IN00000000000001			
Sold To: Mr. Stephen Kershaw 4730 112th Street Richmond, VA 23503 USA			Ship To: Home Office 4730A 112th Street Richmond, VA 23503 USA				
Order No. ORD0000000000003	Order Date Jan 15, 2019	Customer No. 1520	Salesperson RW	PO Number	Ship Via CCT	Terms DUETBL	
Qty. Ord.	Qty. Shp.	Qty. B/O	Item Number	Description	Unit Price	UOM	Extended Price

Sage Intelligence Reporting – Report Utility



Additional report templates can be found from the Report Template Utility or the Free Report Templates group on the Sage Intelligence Community



Report
Financial Trend Analysis
GL Transaction Detail
Financial Report Designer: Layout Generator and Task Pane*
Financial Income Statement
Financial Balance Sheet
Financial Ratio
Dashboard Analysis
Dashboard Analysis AR
Inventory Master
Purchase Master
Sales Master
Sales Master AR

Sage Intelligence Reporting – Report Utility



All Sage products: <https://www.sageintelligence.com/report-utility/>

Sage 300 specific: <https://www.sageintelligence.com/report-utility/sage-300/>



 **Report Utility**

The Report Utility allows you to select the reports you would like and automatically imports these reports into a "New Reports" folder in your Sage Intelligence Report Manager module.

[Download](#) >

Can't find the report you are looking for?
We'd love to hear your report ideas.
[Click here to submit your idea](#)

Tools & Resources – Sage Intelligence



Converting Sage 300 FR reports to Sage Intelligence:

- PDF:
 - <http://www.alchemex.org/FTPBICommunity/Sage300ERPFinancialReporter-to-Sage-Intelligence-Conversion-Guide.pdf>

Free eBooks:

- <https://www.sageintelligence.com/ebooks/>

Community site:

- Join Community to get free tips & tricks on Excel Newsletter
- <http://www.sageintelligencecommunity.com/>

Free Report Templates Group:

- <http://www.sageintelligencecommunity.com/group/freereporttemplates>
- Free Report Templates - Sage 300 ERP Intelligence Reporting:
 - <http://www.sageintelligencecommunity.com/page/free-report-templates-sage-300-erp-intelligence-reporting>
- Free Report Templates - Sage 500 ERP Intelligence Reporting:
 - <http://www.sageintelligencecommunity.com/page/free-report-templates-sage-500-erp-intelligence-reporting>



Sage Intelligence
Community



Sage 300c – Add Notes

JL Sample Company Inc Administrator

sage 300 Home Session Date: Jun 30, 2020

Accounts Payable Accounts Receivable General Ledger Inventory Control Order Entry Purchase Orders More

Income and Expenses

Fiscal Year 2020

Cash Position

Total Cash	\$8,380,023.16
Receivables	\$256,458.24
Total Cash + Receivables	\$8,636,481.40
Less Current Liabilities	\$13,167,219.31
Cash Position	(\$4,530,737.91)

As of 6/30/2020

Top Customers by Billing

The Courtyard	\$10,394.55
Mr. Ronald Black	\$9,473.21
Bargain Mart - Oakland	\$5,777.22
Break-Away Designs	\$4,836.16
Bargain Mart - San Diego	\$4,725.14
ACME Plumbing	\$3,523.65

Top Vendors

New Look Interiors of London	\$18,846.58
Torrington Ltd.	\$13,079.86
Chloride Systems	\$9,129.35
Leon's Catering	\$6,941.49
Marshall-Davidson Ltd.	\$4,844.30
Sentry Supplies	\$3,978.73

Notes + Create New X

Show Notes For: All Status: Active

Entity ID:

- Inquired about A1-400/0 last time, shoul
 - Dismiss Edit Delete
- Overflow of inventory, give additional 1
 - Dismiss Edit Delete
- Change of contact at Wholesales. Ask for
 - Dismiss Edit Delete
- Ken has extended their promotion to end
 - Dismiss Edit Delete
- Customer 1200 is late on payment again.
 - Dismiss Edit Delete

Page 1 of 29 1 - 5 of 141 items

Sage 300c – Customize Fields

Remove fields and labels in web screens you don't use
 Screen size re-adjusts when fields are removed

- Helps with simplifying web screens that are data-heavy

New to web: edit labels of fields

A/P Invoice Entry

Batch Number Details

Batch Description

Batch Date *

Options



Create New Entry

Create New Batch

- Import
- Export
- Customize**

Required *

Number of Entries	0
Batch Total	0.000

Sage 300c – Customize Fields



sage 300 Home Session Date: Jun 30, 2020

Accounts Payable Accounts Receivable General Ledger Inventory Control Order Entry Purchase Orders More

A/R Transactions : Adjustment Batch L... Adjustment Entry Invoice Batch List Invoice Entry Post Batches More ▾

A/R Invoice Entry

Options ⚙️ [Create New Entry](#) [Create New Batch](#)

Batch Number * [Details](#) Batch Description Required *

Batch Date

Batch Summary

Number of Entries	0
Total Amount	0.000

Document Taxes Retainage Terms Optional Fields Sales Split Totals

Entry Number Entry Description Entered By

Customer Number * Customer Description Customer Currency Account Set

Default Detail Type Document Type Document Date Posting Date Fiscal Year/Period Invoice Printed

Document Number PO Number Order Number Apply-To Document Original Document *

Sage 300c – Customize Fields



sage 300 Home Session Date: Jun 30, 2020

Accounts Payable Accounts Receivable General Ledger Inventory Control Order Entry Purchase Orders More

A/R Transactions : Adjustment Batch L... Adjustment Entry Invoice Batch List Invoice Entry Post Batches More

A/R Invoice Entry

Options [Create New Entry](#) [Create New Batch](#)

Batch Number * Required *

Batch Date

Batch Summary

Number of Entries 0

Total Amount 0.000

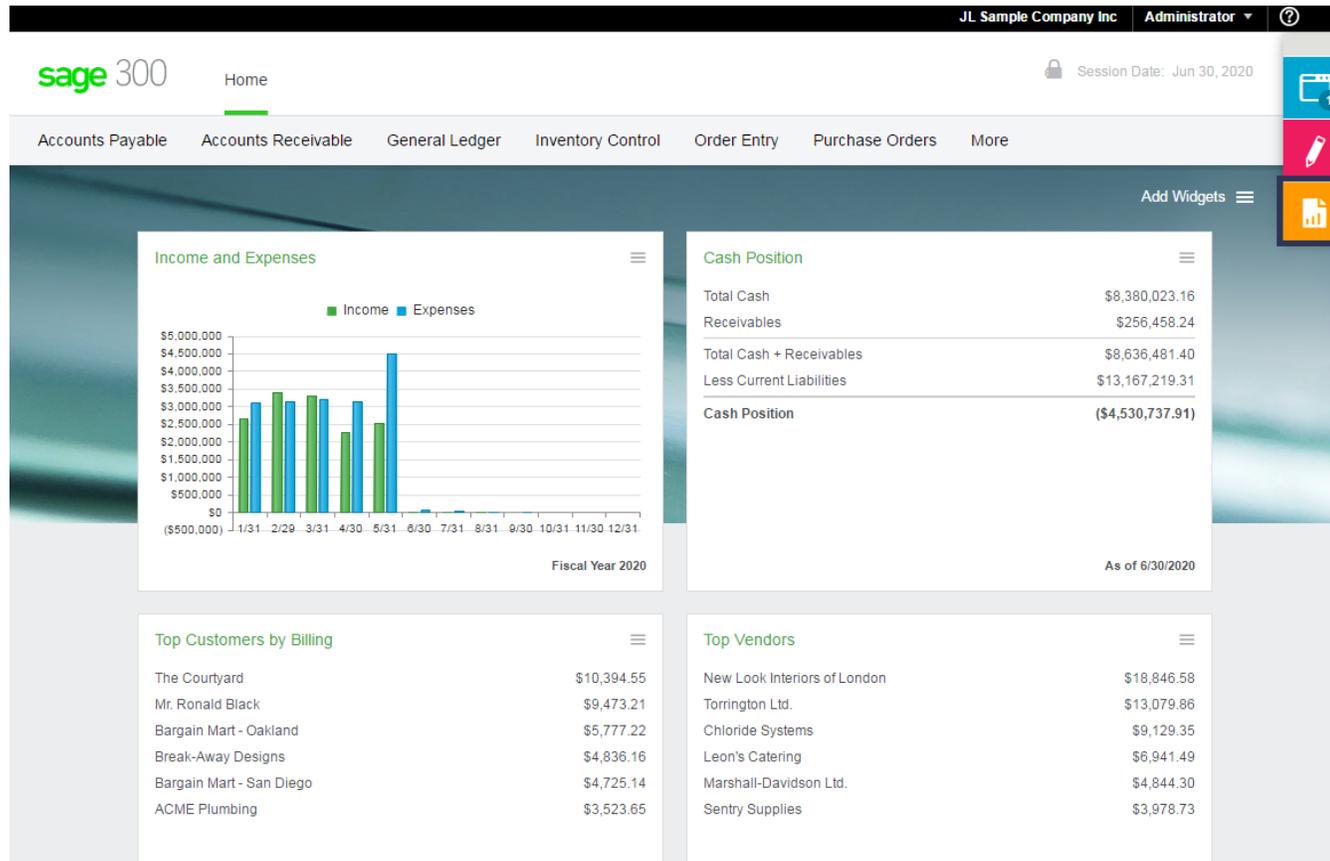
Document Taxes Retainage Terms Optional Fields Sales Split Totals

Entry Number

Client ID * Account Set

Default Detail Type Document Type Document Date Posting Date

Sage 300c – Add Custom Reports/Forms



The Reports menu is open, showing a list of reports and a button to add a new report link.

- Reports** (with a red '+ Add Report Link' button)
- AR Dunning Messages
- AR Invoice Report
- CS Company Profile report

Reducing DBLoad Time

- Rename the extension of the data files you don't need.
Note: GL01. rec is always required.

Something bad happened to your MS-SQL Database. And you don't have a backup 😞

1. Run all these first

```
ALTER DATABASE SAMINC SET SINGLE_USER WITH ROLLBACK IMMEDIATE;  
BEGIN TRANSACTION;  
DBCC CHECKDB ('SAMINC', REPAIR_ALLOW_DATA_LOSS);
```

2. Close the Query window

3. Re-open a new Query Window and run below to put database back to MultiUser Mode.

```
ALTER DATABASE SAMINC SET MULTI_USER;
```

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Thank you