Sage 300

Construction and Real Estate

Sage 300 Construction and Real Estate

(formerly Sage Timberline Office)

Release Notes

Version 13.1

sage

Table of Contents

Release Overview

About this document

This document contains information about the current release of Sage 300 Construction and Real Estate. Each Sage 300 Construction and Real Estate application is described in a separate section, which includes information about new features and enhancements for the release, resolved issues, and any known issues.

In addition to reading this document, read the supporting documentation before you install. See "Supporting Documentation" on page 2.

About this release

The 13.1 release of Sage 300 Construction and Real Estate includes enhancements and software fixes. For detailed information about the changes made in a specific application, refer to the appropriate section in this document. Highlights of this release are listed in the following table.

Application	Features and enhancements
general	"Support for Windows 8 and Windows Server 2012 operating systems" on page 6
Accounts Receivable	"User interface improvements" on page 8
General Ledger	"User interface improvements" on page 10
Job Cost	"User interface improvements" on page 12
Payroll - U.S.	"State certified reports" on page 15
Server Migration	"Migration of attachments" on page 19

Support and Assistance

Supporting Documentation

In addition to reading this document, read the following supporting documentation before you install:

- The **User's Guide** contains information about systems, security, Crystal reports, ODBC, and more. It contains a chapter on system requirements and chapters on installation of Sage 300 Construction and Real Estate and Sage Estimating.

- The *Installation Checklist* contains a brief description of the steps involved in upgrading your software.

- The *Important* document contains critical late-breaking topics.

You can access a complete library of supported product documents.

Online Help

Each Sage 300 Construction and Real Estate application includes online help, which provides answers to your questions about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [**Help**] button, click (the help icon button), or press F1 to display the help topic for that window.

- In an application, select **Help > Help Topics**.

- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding the information you need, the online help for each application includes the following panes:

- **Contents** tab with an outline of the help with links to the help topics.

- **Index** tab with keywords that link to help topics related to that keyword.

- **Search** tab, where you can type text and click [**Search**] to locate that text in the help topics.

We would like your feedback about the online help so we can make improvements. The bottom of each help topic contains an area where you can indicate whether the topic was helpful and provide additional comments. To protect your privacy, all comments are anonymous.

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**

- From your browser, visit https://sageu.csod.com/.

Contact your business partner for local training.

Technical Assistance

Depending on your Sage Service Plan, you may be able to take advantage of the services shown in the following chart. Please keep in mind, our response times can be longer during peak times.

Type of question	Recommendation	Response time goals	How to reach us
How-to or step-by-step instruction	**Sage Knowledgebase** Find answers to your questions and subscribe to articles.	Available 24/7	[Sage Customer Portal](#) Log on and click "Knowledgebase"
Quick inquiry	**Live Chat** Chat online with a customer support analyst.	No waiting	[Sage Support Live Chat page](#) Enter your name, email address, product, & question
Complex, but not urgent	**Online Support Request** Submit your questions through a web form for our customer support analysts to contact you.	Within 2 hours	[Sage Customer Portal](#) Log on and click "Cases"
Complex and/or urgent	**Customer Support Call Center** Work with one of our customer support analysts over the phone.	3 minutes or less	800-551-8307

Hours

Live Chat: Monday through Friday from 6 AM to 3 PM Pacific time, with the same exceptions as telephone support (see below).

Telephone Support and Online Support Request: Monday through Friday from 6 AM to 5 PM Pacific Time with the following exceptions:

- Every Thursday from 2 p.m. to 3 p.m. Pacific Time (closed for staff meetings)
- Standard United States holidays

Phone support for Australia and New Zealand

Please contact your Business Partner.

Upgrading your service plan

If you would like to renew a service plan or upgrade your service plan (such as to add telephone support), please call **800-858-7098**.

Submitting enhancement requests

We want to hear your suggestions for improving the software. To send us your comments, select **Help > Sage on the Web > Submit Enhancement Requests**.

Installation

Before you install this update, review the **System Requirements** chapter of the *User's Guide* and the **Install Sage 300 Construction and Real Estate** chapter, which provides step-by-step instructions.

Sage 300 Construction and Real Estate version 13.1 includes installation of Pervasive 11, which contains new licensing requirements. Your server and workstations must have Internet access to install and use this software.

✳ IMPORTANT: We now support Microsoft Windows 8 and Microsoft Server 2012.

❯ TIP: If you are planning to run Sage 300 Construction and Real Estate on new hardware, use the updated Server Migration tool. See chapter 5 of the *User's Guide* for instructions.

Installation Paths

If you are on a version earlier than 9.7, you must first upgrade to version 9.8 before upgrading to version 13.1. For more information, see the **Supported upgrade paths** section in Chapter 1 of the *User's Guide*.

Installation Notes

- **Document Management** - During the Accounting installation, AP invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault 13.1. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action *before* installing Sage 300 Construction and Real Estate.

- **Project Management Correspondence Log** - If you use the Correspondence Log and Windows Office 2010, you must install Project Management components on your server and workstations *after* you install Sage 300 Construction and Real Estate 13.1. Follow the instructions in the "Install Project Management Components" section in Chapter 2 of the *User's Guide*.

- **Estimating** - If you use Sage Estimating, we recommend that you install Sage Estimating 13.1 *after* installing Sage 300 Construction and Real Estate 13.1.

✳ IMPORTANT: If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We **do not** support rolling Sage 300 Construction and Real Estate back to a previous version and **do not** recommend it.

⚠ CAUTION: Residential Management is not currently supported on computers with the Windows 8 or Windows Server 2012 operating system.

Database and Report Changes

As with any release, database changes in Sage 300 Construction and Real Estate applications may affect your custom report designs or custom third-party applications. Contact your authorized business partner to discuss any issues relating to custom reports or third-party applications.

To view fields contained in new records:

- In Report Designer, view the Available Fields report (by selecting **Tools > Available Fields**).

- In Crystal Reports, open an existing report, specify the data source location, add new or modified records, and view the fields through Field Explorer. For more information about this procedure, refer to the **Crystal Reports** chapter of the *User's Guide*.

These Release Notes list current database changes by application:

Application	Page
Accounts Payable	page 7
Billing	page 8
Cash Management	page 9
Payroll - Australia	page 13
Payroll - Canada	page 14
Payroll - United States	page 16

You can access Release Notes from previous versions of Sage 300 Construction and Real Estate (formerly Sage Timberline Office) from the Product Documents page.

General Topics

New features and enhancements

Support for Windows 8 and Windows Server 2012 operating systems

Sage 300 Construction and Real Estate is now supported on computers running the Windows 8 or Windows Server 2012 operating system. For more information, see chapter 1 of the ***User's Guide***.

CAUTION: Residential Management is not currently supported on computers with the Windows 8 or Windows Server 2012 operating system. Also, Estimating Explorer is not currently supported on computers with the Windows 8 or Windows Server 2012 operating system.

User interface improvements

The grids in specific high-use windows in the following applications were updated to make it easier to enter and view information on high resolution screens. The grid contains more lines and columns if your screen resolution is higher than 1024 x 768.

Application	Page
Accounts Receivable	page 8
General Ledger	page 10
Job Cost	page 12

Accounts Payable

New features and enhancements

Resolved issues

1099 forms

You can now generate 1099 forms in Aatrix by prefix A and prefix B.

Email addresses

When you made a change to vendor information in the **Vendor Setup** window in Accounts Payable, the email address from that window (even if blank) is no longer synchronized to the email address for that vendor in Address Book.

1099 totals

When an invoice that was entered in the **Enter Invoices** window and is paid by a credit card, invoice distributions are now marked as 1099 exempt. If that credit card payment is voided, 1099 totals are no longer changed.

Database changes

APM #9 - Vendor

An attribute on the following fields was changed to be ODBC replaceable on the APM record:

- VTY1099
- VTYDED
- VLY1099
- VLYDED
- VNY1099
- VNYDED

APM #10 - Prefix Total

The following fields were changed to be ODBC replaceable on the APM record:

- FYTDAMT
- FYTDDED
- FLYAMT
- FLYDED
- FNYAMT
- FNYDED

APM #4 - Check through ARM #22 - Vendor Misc Compliance

All field numbers in the APM file after CPMTID (the Payment ID field) changed.

API #4 - Check through API #11 - Electronic Payment

All field numbers in the API file after CPMTID (the Payment ID field) changed.

Accounts Receivable

New features and enhancements

User interface improvements

The grids in the following windows were updated to make it easier to enter and view information on high resolution screens. The grid contains more lines and columns if your screen resolution is higher than 1024 x 768.

- **Enter Invoices - Invoices** window (in **Contract/Job view**, **Customer view**, and **Standard view**)
- **Enter Invoices - Distributions** window
- **Enter Cash Receipts - Deposit Items** window (in **Contract/Job view**, **Customer** view, and **Standard** view)

Address Book

There were no major updates to Address Book for this release.

Billing

There were no major updates to Billing for this release.

Database changes

BLI #2 - Worksheet Entry

The width of WUPRICE (the unit price field) changed; it is now 11 instead of 10.

Cash Management

There were no major updates to Cash Management for this release.

Database changes

CMM

All field numbers in the CMM file changed.

Contracts

There were no major updates to Contracts for this release.

Desktop

There were no major updates to Desktop for this release.

Equipment Cost

There were no major updates to Equipment Cost for this release.

Financial Statements

There were no major updates to Financial Statements for this release.

General Ledger

New features and enhancements

User interface improvements

The grid in the **Record Entries** window was updated to make it easier to enter and view information on high resolution screens. The grid contains more lines and columns if your screen resolution is higher than 1024 x 768.

Resolved issues

Export to Excel

When inquiries are exported to Excel, account numbers that use three prefix levels (A, B, and C) are now formatted correctly (without asterisks).

Information Assistant

There were no major updates to Information Assistant for this release.

Inquiry

There were no major updates to Inquiry for this release.

Inventory

Resolved issues

Stock transfers

When you post a stock transfer in Inventory, the transfer-in side of the entry now gets marked as posted, so the transfer-in side no longer displays on the posting journal.

Stock issues

When the **Direct Cost Settings** in Job Cost are set to not use the ref 1 and ref 2 fields, stock issue batches now post successfully to Job Cost.

Inventory costs

When sending inventory costs to Job Cost and posting those entries, the entries now show up correctly in Billing.

Parts on SM work orders

When inventory parts are added to work orders in Service Management, you synchronize Service Management with Inventory (by selecting **Tools > SM Synchronization** in Inventory), and you send transactions to Job Cost (by selecting **Tasks > Send Inventory Costs to Job Cost** in Inventory), the transactions are now sent correctly to Job Cost.

Zero-quantity transactions

If you have zero-quantity inventory transactions (such as when the physical count for an item is the same as the expected quantity) and you select **Tasks > Send Inventory Costs to Job Cost**, those transactions are sent to Job Cost; they no longer show up repeatedly in the IC Send to JC Journal.

Web page

When you select **Help > Live Chat** in the Inventory applications, the **Live Chat Assistance** web page opens instead of the **Sage Customer Portal** logon page.

Job Cost

New features and enhancements

User interface improvements

The grid in the **Enter Commitment** window was updated to make it easier to enter and view information on high resolution screens. The grid contains more lines and columns if your screen resolution is higher than 1024 x 768.

Resolved issues

Commitments

Commitments that contain inclusions and/or exclusions take less time to open.

MyAssistant

New features and enhancements

You now have the ability to position the table of notifications in the body of an email message, which provides better support for letters and email signatures.

You can now specify an Email directory in the **From** control in the email template.

ODBC

The ODBC driver was updated to collect data from the updated Sage 300 Construction and Real Estate databases. For more information about using the ODBC driver, see the **Sage 300 Construction and Real Estate ODBC** chapter of the *User's Guide*.

Payroll (Australia)

New features and enhancements

To comply with government regulations, changes were made to the employment termination payment summary data record. The **ETP/INB Payment Summary** tab of the **Employee Setup** window was updated to reflect these changes.

Database changes

PRS #4 - Fringe

Although not currently used by Australian Payroll, the FTYPE (Benefit Type) combo field was added to enable reporting for certified reports in the United States. It has the following values:

N	(none)	M	Medical
A	Apprenticeship	O	Other
B	Disability	P	Pension
D	Dental Insurance	T	Training
H	Holiday	U	Suppl. Unemployment
L	Life Insurance	V	Vacation

PRS #4 - Fringe through PRS #23 - Check form earning detail

Because of the addition of the FTYPE field, the field numbers for all fields in the PRS file after the FTYPE field changed.

Payroll (Canada)

Resolved issues

ROE forms

In Sage 300 Construction and Real Estate Payroll, you can select **Tasks > eFile and Reporting** in Payroll to utilize Aatrix eFiling Service to submit ROE forms to the Canadian government and receive confirmation back of a successful submittal. When a ROE is submitted after 3 p.m. Central time, Aatrix processes it the next day. Although this still meets Canadian government requirements, the delay may affect some contract requirements that ROE forms be processed within 24 hours of the employee being laid off.

To address this issue, you now have the ability to generate ROE forms within Payroll (independent of the Aatrix eFiling Service) by selecting **Tasks > Print ROE Forms**.

With either method of submitting ROE forms, the software now automatically updates the **Last ROE date** field of the employee record.

T4 forms

Previously, the pension plan number only printed in Box 50 when there was an amount in Box 20 (for employee contributions to a registered pension plan). Now, when there is a pension adjustment amount in Box 52, the registered pension plan (RPP) or deferred profit sharing plan (DPSP) number is printed in Box 50.

Database changes

PRS #4 - Fringe

Although not currently used by Canadian Payroll, the FTYPE (Benefit Type) combo field was added to enable reporting for certified reports in the United States. It has the following values:

N	(none)	M	Medical
A	Apprenticeship	O	Other
B	Disability	P	Pension
D	Dental Insurance	T	Training
H	Holiday	U	Suppl. Unemployment
L	Life Insurance	V	Vacation

PRS #4 - Fringe through PRS #23 - Check form earning detail

Because of the addition of the FTYPE field, the field numbers for all fields in the PRS file after the FTYPE field changed.

Payroll (United States)

New features and enhancements

State certified reports

You can now generate and file certified reports for federally-funded jobs in the following states:

- Alaska: 07-6058 Form
- California: A-1-131 Form
- Colorado: DOL Report
- Illinois: 452CM01 Form
- Georgia: DOL Report
- Michigan: DOL Report
- New Jersey: Certified Payroll Form
- New York: DOL Report
- North Carolina: DOL Report
- Pennsylvania: LLC-25 Form

To generate the certified report:

1 Select **Tasks > State eFile and Reporting**.

2 In the **State eFile and Reporting** window, select the state, report, and period end date, and then click [**Next**].

3 Select the projects to process, and then click [**Next**].

4 Select the employees to process, and then click [**Next**].

5 Select the project from the project list, and then click [**View**].

   The report is then displayed in the Aatrix window.

Resolved issues

Form 941 and EFTPS report

Form 941 now correctly displays the taxable wages and tips subject to Additional Medicare Withholding in Box 5d (MEDADDL tax) for employees earning over $200,000. In addition, the Federal Tax Deposit Coupon (EFTPS) now includes the MEDADDL tax in the amount of tax deposit due on Form 941

Maryland W-2 withholding for box 17

You can now use the **Link Aatrix Tax Types** function to combine Maryland state withholding (MDSWH) with Local Tax IDs for W-2 forms. After you download and install this Payroll update, refer to Knowledgebase article KB533378 for steps to set up the Aatrix group.

> **NOTE:** If you use the **Misc Tax Code** in **Setup > Employees** to add the local tax rates to the state withholding rate and do not have separate local tax IDs, you do not need to download and install this Payroll update.

DOL WH-347 reports

The Aatrix DOL WH-347 report now prints the FICA amounts for the employees, instead of **0.00**.

Database changes

PRS #4 - Fringe

To pass data to Aatrix for certified reports, the FTYPE (Benefit Type) combo field was added. It has the following values:

N	(none)	M	Medical
A	Apprenticeship	O	Other
B	Disability	P	Pension
D	Dental Insurance	T	Training
H	Holiday	U	Suppl. Unemployment
L	Life Insurance	V	Vacation

PRS #4 - Fringe through PRS #23 - Check form earning detail

Because of the addition of the FTYPE field, the field numbers for all fields in the PRS file after the FTYPE field changed.

PRS #24 - Aatrix group

This new record was added to improve the tracking of local taxes. It contains the following fields:

- AXGRPID
- AXGDESC
- AXSTATE
- AXTYPE
- AXEMPID
- AXW2DES
- AXSUBJ
- AXACTIV
- AXOSTMP
- AXDSTMP
- AXTSTMP

PRS #25 - Aatrix group item

This new record was added to improve the tracking of local taxes. It contains the following fields:

- AIGRPID
- AIPRID
- AILEVEL
- AIOSTMP
- AIDSTMP
- AITSTMP

Project Management

Resolved issues

Change requests

Change requests take less time to open or print.

Menu items

The menu items in the **Contract Control** menu now appear even when the Contracts application is not installed.

Property Management

Resolved issues

Window display

Previously, when tasks were accessed from the desktop, the windows were either too small or too large (with blank areas). Now, the windows display normally--the same way that they display when tasks are accessed directly from Property Management.

Purchasing

Resolved issues

PO-JC integration

When you select **Tasks > Send Orders to Job Cost**, the software uses a different method to send purchase order information to Job Cost to prevent integration problems.

Invoices

Previously, when an invoice was created in Purchasing that had leading or trailing spaces and was sent to Accounts Payable, there would be problems if there was already an AP invoice with that number (without the spaces). Now, when invoices are created in Purchasing, the leading and trailing spaces are removed from invoice numbers. When an invoice is sent to Accounts Payable and an AP invoice with that number already exists, the imported invoice is correctly rejected as a duplicate.

When you have a purchase order for a job that has numeric (instead of alpha) categories or extras, you can now send the invoice for that purchase order successfully to Accounts Payable.

Web page

When you select **Help > Live Chat** in the Purchasing applications, the **Live Chat Assistance** web page opens instead of the **Sage Customer Portal** logon page.

Remote Time Entry

There were no major updates to Remote Time Entry for this release.

Report Designer and Reporting

There were no major updates to Report Designer for this release.

Residential Management

There were no major updates to Residential Management for this release.

CAUTION: Residential Management is not currently supported on computers with the Windows 8 or Windows Server 2012 operating system.

Sage Installation Manager

There were no major updates to Sage Installation Manager for this release.

Sage System Verifier

There were no major updates to Sage System Verifier for this release.

Security Administration

There were no major updates to Security Administration for this release.

Server Migration

New features and enhancements

Migration of attachments

The layout of the **Attachment Paths** window was improved. You can now change the new attachment path for all attachments to the default location on the new server by clicking a button.

Service Management

There were no major updates to Service Management for this release.