Sage 300 Construction and Real Estate

(formerly Sage Timberline Office)

Version 18

Release Notes

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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 known issues. If you use integrated products, see page 6 before installing this version.

In addition to reading this document, read the supporting documentation before you install. See "Supporting documentation" (the next section).

About this release

Version 18 of Sage 300 Construction and Real Estate includes enhancements and software fixes. Highlights of this release are listed in the following table.

Application/area	Features and enhancements
Mobile Dashboards	New tool; see page 15.
Accounts Payable	"Credit card payment fixes" on page 9 "1099 processing in Aatrix" on page 9
Cash Management	"Importing cleared checks" on page 10
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System Administrator	Enhancements; see page 27.

You can also view:

- The Release Highlights video to learn more about the new features and enhancements in 18.1.
- The 2019 Year-end Release Highlights video for information about version 18.4 and changes for year-end processing.

We recommend that you also install the latest revision of version 18 to get the latest updates and bug fixes. Version 18.4 is the year-end version for 2019. Version 18.4 includes the changes made in the previous revisions of version 18. Highlights of the changes in these revisions are listed in the following table.

Rev	Application/Area	Features, enhancements, and resolved issues
18.4	Payroll (United States)	Entries for the new IRS W-4 form for 2020; see page 21 New task for EEO-1 Component 2 reporting; see page 21
18.4	Project Management	Estimates imported from Sage Estimating (SQL); see page 22
18.4	Reports	New California Consumer Privacy Act (CCPA) reporting; see page 8.
18.4	Attachments	Attachments now open, even in Subcontractor Compliance; see page 8.
18.4	File Doctor	Fixes to File Doctor; see page 8
18.3	Desktop	Improvements made to Desktop; see page 11.
18.3	SQL Replicator	Configuring replicator logs; see page 25.
18.3	System Administrator	Quickly accessing the Task Scheduler; see page 28.
18.2.2	Payroll (United States)	All ACA compliance details are carried over to the new year; see page 21.
18.2.1	Mobile Dashboard	Importing custom dashboard reports as well as two sample dashboards created by Sage; see page 18.
18.2.1	SQL Replicator	New modes that control the files replicated and timing of replication; see page 26.
18.1.4	Mobile Dashboard	Faster to import Sage reports and to navigate through multiple data sources (to create a dashboard report).
18.1.4	SQL Replicator	Replication uses multi-threading to improve performance.
18.1.4	System Administrator	The new [**Repair Services**] button enables resetting Sage managed service accounts.

Rev	Application/Area	Features, enhancements, and resolved issues
18.1.4	Payroll (United States)	New tax for the Oregon State Transportation Improvement Fund (ORTIF); see page 21.
18.1.4	tsSimba	Includes the latest bug fixes for the Simba ODBC driver.
18.1.3	Payroll (Australia)	Set up and generate files for Single Touch Payroll; see page 20.
18.1.2	Inventory and Purchasing	Run the Inventory and Purchasing reports using SQL data.
18.1.2	Mobile Reports	Fully run the Mobile Reports application.
18.1.2	SQL Replicator	Replicator now correctly replicates data when the SQL server instance is on a different server from your Accounting server—or when there was older SQL data that was replicated using version 17.1.
18.1.2	System Administrator	No longer need to manually stop Replicator before running a backup in System Administrator.

Note: When you install this version of the software, Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. Before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the Sage Customer Portal; see Knowledgebase article 87017 for more information. You will also need to know your **Registration Name** and 10-digit **Sage Client ID**.

Support and Assistance

Supporting documentation

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

- The *Important* document contains critical and late-breaking topics.
- The *Installation Checklist* contains a brief description of the steps involved in upgrading your software.
- The *User's Guide* contains installation steps for Sage 300 Construction and Real Estate and Sage Estimating.
- The *Sage SQL Replicator Setup Guide* contains information for setting up Sage SQL Replicator.
- The *Sage Construction Central Setup Guide* contains information for setting up Sage Construction Central (where selected employees can access Mobile Reports and Mobile Dashboard).

You can also access a complete library of product documents.

Online help

Each Sage 300 Construction and Real Estate application includes online help, which provides information 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 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 information, the online help for each application includes the following tabs:

- **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.

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 Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit http://www.sageu.com/Sage300CRE.

Contact your business partner for local training.

> **Note:**
> For year-end 2019, Sage University is offering the following complimentary classes:
>
> - 2019 Year-end Procedures (U.S.)
> - 2019 Year-end Procedures (Canada)

Technical assistance

When you need more assistance, you can search Sage Knowledgebase for technical articles, chat online with a Sage expert, visit Sage City to join interactive community discussions, or contact your Sage Business Partner.

Installation

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

If you use integrated products, see page 6 before installing this version.

Beginning with 17.1 Rev 5, you no longer enter activation codes when you install. Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. Before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the Sage Customer Portal; see Knowledgebase article 87017 for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com). You can use the new License Administrator tool to manage these licenses.

The installer detects old operating systems (including Windows XP, Windows Vista, Windows Server 2003, and Windows Server 2008 R1) and will prevent the installation of Sage 300 Construction and Real Estate. For a complete list of supported operating systems, see the System Requirements article in the Sage Knowledgebase.

> **Important!** If you want to run the new SQL Replicator tool (which is needed to run mobile applications), use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data. If the size of your data (including Service Management, Purchasing, and Inventory) is under 6 GB, you can use SQL Express. For information about installing and using SQL Replicator, see the *Sage SQL Replicator Setup Guide*.

> **Tip:** If you have a large number of workstations, you can now use a script to silently install the software on client workstations. For more information, see Knowledgebase article KB 83952.

> **Note:** If you are planning to run Sage 300 Construction and Real Estate on new hardware, use the Server Migration tool. See chapter 3 of the *User's Guide* for instructions.

Installation paths

If you are on version 18.1, 18.2, or 18.3, you can upgrade directly to version 18.4.

If you are on version 16.1 or 17.1, you can upgrade directly to version 18.4.

If you are on version 14.1, or 15.1, we recommend that you first upgrade to version 16.1 and upgrade your data (including Inventory, Purchasing, and Service Management data) before upgrading to version 18.4.

If you are on a version that is earlier than 14.1, we recommend that you contact your Business Partner for assistance.

Integrated products

> **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.

Sage Document Management

If you also use Document Management:

- If Document Management integrates with Sage 300 Construction and Real Estate Accounting, **DO NOT** upgrade to version 18.3 or 18.4. There is no 18.3 or 18.4 version of Document Management. Also, Document Management will be retired December 31, 2019; see Knowledgebase article 91616 for more information about the retirement.

- You can upgrade Sage 300 Construction and Real Estate Accounting to version 18.3 or higher if you run Document Management in a standalone environment; see Knowledgebase article 91608 for more information.

- If you upgrade to version 18.2 or 18.1, you must upgrade both products to the same version. For more information, see the **Upgrade paths** section in **Chapter 1** of the *User's Guide*.

> **Important!** If you install Sage 300 Construction and Real Estate Accounting 18.3 or 18.4, Document Management and DocuVault **will be removed**.

Sage Estimating

If you also use Sage Estimating (SQL), you may need to upgrade to a compatible version:

- Estimating 18.12, 19.11, 19.12, or 20.1 for Sage 300 Construction and Real Estate version 18.2 and higher

- Estimating 18.11 for Sage 300 Construction and Real Estate version 18.1

For more information, see the **Compatible versions** section in **Chapter 1** of the *User's Guide*.

> **Notes:**
> - There is no version of Sage Estimating (Pervasive) that is compatible with Sage 300 Construction and Real Estate version 18 (except for Australian version 18.1.3).
>
> - You can use Sage Fixed Assets version 2018.0 with Sage 300 Construction and Real Estate version 18.1 or 17.1 because they both use Crystal Reports runtime SP19.
>
> - Sage Fixed Assets 2018.1 uses Crystal Reports runtime SP21. Although Crystal reports seem to run correctly when you run Sage Fixed Assets 2018.1 on the same machine as Sage 300 Construction and Real Estate 18.2 or Sage Estimating (SQL) 18.12, we recommend that you run Sage Fixed Assets on a different machine.

Known issues

Disabling of scheduled Windows tasks

The installation of version 18.2.2 may disable tasks in the Tasks Scheduler. See Knowledgebase article 95054 for instructions for enabling the tasks.

Database 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 Designer, 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*.

General Topics

Licensing

Beginning with 17.1 Rev 5, you no longer enter activation codes when you install. Sage 300 Construction and Real Estate automatically accesses the licenses for the various applications for which your company is entitled. If you are upgrading from 16.1, before you install, we recommend that you review the number of uses your company has purchased for each application by logging onto the Sage Customer Portal; see Knowledgebase article 87017 for more information. If you need to purchase additional uses, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com). You can use the new License Administrator tool to manage these licenses.

Enhancements in 18.4

California Consumer Privacy Act (CCPA)

The California Consumer Privacy Act (CCPA), which becomes effective on January 1, 2020, is designed to prevent the unauthorized disclosure and sale of personal information of consumers in California. "Consumers" can be your customers, vendors, employees and their dependents, tenants, and other contacts.

If your company does business in California, refer to the CCPA website to determine what your company needs to do to comply. You should consult your legal counsel for specific requirements that your business may need to fulfill.

You can print reports that list the types of personal information stored in Sage 300 Construction and Real Estate. See Knowledgebase article 101888 for more information. If you need to delete any of this personal information, see Knowledgebase article 101987.

Resolved issues in 18.4

Attachments

In 18.3, certain attachments would not open when double-clicking the attachment or clicking [**Open**]. Although some attachments would open if you right-clicked the attachment and selected **Open with** an application, attachments associated with Subcontractor Compliance in Accounts Payable, Job Cost, and Project Management were replaced with an error attachment called "System.Collections.ArrayList." Now, attachments open correctly.

File Doctor

- If there is a text field that is too long, File Doctor now truncates the text when fixing the records.
- If there is a zero or negative sequence number, File Doctor now changes the sequence number to a positive value.

Resolved issues in 18.1.1

- The resolution of the company logo image used in Crystal Reports was improved.
- You can now use TLS encryption when using SMTP for emails (such as from transmittals or RFIs) by selecting the **Use TLS** check box on the **Mail Settings** tab of the **Options** window.

Resolved issues in 18.2

File Doctor can now fix corrupted files when the amounts are very large as well as when the month or day values are very large.

Accounts Payable

There were no major updates to Accounts Payable for this release.

Resolved issues in 18.1.1

Credit card payment fixes

- After you record a few credit card payments, you no longer get a message about another user locking the data file.
- You can now void a credit card payment without getting a message about another user locking the data file.

1099 processing in Aatrix

When processing 1099 forms in Aatrix using merged files, the Payer Tax ID is now formatted correctly.

Accounts Receivable

There were no major updates to Accounts Receivable for this release.

Address Book

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

Billing

There were no major updates to Billing for this release.

Resolved issues in 18.2

When Work In Progress (WIP) entries are sent to Billing for a Purchasing Accounts Payable invoice that is not linked to a purchase order or PO receipt, duplicate entries are no longer created when JC transactions are posted in Job Cost.

Cash Management

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

Resolved issues in 18.4

Reprinting checks for terminated employees

Previously, if you reprinted a Payroll check for a terminated employee, the original check was not voided in Cash Management. Now, when you reprint the check (using the same check number or a new check number), the original check is voided.

Resolved issues in 18.1.1

Importing cleared checks

You can now import cleared checks without some being skipped with a message about a bookmarked position.

Contracts

There were no major updates to Contracts for this release.

Desktop

Desktop improvements in 18.3

The following improvements were made to Desktop for this release:

- Sage 300 Construction and Real Estate Administrators have access to the System Administrator and License Administration applications under **Options**.

- The Desktop window can now be resized so it can be adapted to smaller screens.

  Thanks to Bonnie E. for this suggestion.

- You can now drag-and-drop files (including multiple files at once) from Explorer into the Desktop **Favorites** pane.

  Thanks to Jennifer H. for this suggestion.

Also, because **Dsktp.exe** is no longer used, it is no longer included as part of the Sage 300 Construction and Real Estate installation.

Resolved issues in 18.4

Desktop reports blocking tasks

If you have a report open in the Desktop, it no longer locks the files needed to run tasks in other applications.

Resolved issues in 18.1.1

Range selection

You can now include Crystal reports that use tsRange as a tab in Desktop. The [**Ranges**] button will now appear in the **Parameters** pane.

Opening times

When many people are using an application, it no longer takes a lot of time to open that application from Desktop.

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

There were no major updates to General Ledger for this release.

Information Assistant

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

Inquiry

This release includes the following resolved issue for Inquiry.

Inventory

There were no major updates to Inventory for this release.

Resolved issues in 18.4

Amount of PO receipt with add-on taxes

Previously, when an Inventory-related PO receipt that had add-on taxes was posted, the tax addon amounts were not included in the amount sent to Inventory. This caused a difference between the amount sent to the GL Inventory account and the amount sent to the Inventory sub-ledger, which undervalued the Inventory and thus the cost to jobs when items were issued from Inventory. Now, the amount of the taxes associated with the addon is correctly included in the amount sent to Inventory.

Resolved issues in 18.1.2

You can now run the Inventory reports using SQL data.

Job Cost

This release includes the following resolved issues for Job Cost

Resolved issues in 18.4

JC - SQL Estimating integration

When you send information on extras to Job Cost using a JCE file, the description of the extra is now sent correctly.

Resolved issues in 18.1.1

Revenue account

If you do not use prefixes for General Ledger accounts, you can now select a revenue account when setting up a new job.

Known issues

When you enter a new job and do not specify the **Through Date definition** choices for lien waivers on the **Job Compliance** tab of the **Job Setup** window, the default values may not be saved.

License Administration

The License Administration tool was new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to track and assign licenses for your Sage 300 Construction and Real Estate applications.

To access the tool (on the server), select the **Sage Administration** program group, and then select **License Administration**.

- Use the **Licenses** tab to view and allocate the total uses for each application.
- If your company purchased licenses for the Mobile Dashboard application (described on page 15) or the Mobile Reports application (described on page 19), assign these licenses to employees on the **Mobile Licenses** tab.

> **Tip:** For information about using License Administration, see the online help by clicking ⑦ (the Help button) in the upper-right corner of the window.

Mobile Dashboard

The Mobile Dashboard application was new for Sage 300 Construction and Real Estate version 18.1. With this application, selected employees can use a mobile device or computer to view dashboards and dashboard reports with visual information about the state of your company. Those employees who have Dashboard Designer licenses can also import, create, and edit dashboard reports as well as create and edit dashboards. Dashboard reports contain one or more report parts, such as charts or grids with the data. See the Introduction to Mobile Dashboard video for more information.

To access Mobile Dashboards, your employees use a browser to log into the Sage Construction Central website, select **Intelligence** in the menu on the left, and then select **Dashboards**.

Sage provides a variety of dashboard reports that you can import and use for your dashboards; see the following table for descriptions. The *Sage Construction Central Setup Guide* also provides information about importing the Sage dashboard reports and creating dashboards. You can also select **Support > Help** in the upper-right corner of the Mobile Dashboard page to view the online help.

> **Note:** Mobile Dashboards uses your company data stored in the SQL database. You must use the SQL Replicator to copy the data stored in the Actian Pervasive database and replicate it into a SQL database. See page 25 for information about the SQL Replicator.

When you purchase Mobile Dashboard, a subscription to the Microsoft Azure Active Directory (AAD) is included. AAD provides a secure connection from your mobile device to your Sage 300 Construction and Real Estate data. You will receive an email with instructions to set up AAD and Mobile Dashboard. For information about setting up ADD, using License Administration to assign the Mobile Dashboard licenses to employees, and using Security Administration to control security for mobile, see the *Sage Construction Central Setup Guide*.

For information about purchasing Mobile Dashboard, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).

Sage dashboard reports

You can import the following Sage dashboard reports to use for creating your dashboards as well as your own dashboard reports.

Report	Description
AP	
Accounts Payable Summary	This report shows the amounts owed each of your vendors. A donut chart shows the open amounts by month and by vendor. A line chart shows the monthly amounts by amount type for all vendors. A bar chart shows the top 10 vendors (ranked by open invoice amount) and their amounts owed. A grid shows the vendor, amount paid, invoice balance, open retainage amount, and net amount owed. You can click a vendor to drill down and view open invoice details.

Report	Description
AP Aging - Vendor Detail	This report shows details about the invoice amounts owed your vendors in each aging period. A column chart shows the amount in each aging period. A grid for each vendor shows details about the open invoices, including the invoice number, invoice date, accounting date, invoice amount, and remaining retainage payable. You can filter the chart and grid by vendor.*
AP Aging - Vendor Summary	This report shows the amounts owed each of your vendors in each aging period. A donut chart shows the open amount by aging period and by vendor. A column chart shows the amounts owed all vendors by aging period. A grid shows the vendor, open amount, open retainage amount, average days open, and amounts in each aging period. You can click a vendor to drill down and view invoice aging details.
AP Open Invoice Detail	This report shows details about unpaid vendor invoices. A donut chart shows the open amounts by month and by vendor. A line chart shows the monthly amounts by type for all vendors. A grid for each vendor shows the invoice date, invoice number, amount paid, invoice balance, open retainage, and net amount owed. You can filter the chart and grid by vendor.*
AR	
AR Aging-Customer Detail	This report shows the amounts due from your customers in each aging period. A column chart and pie chart show the amounts due by aging period. A grid for each customer shows the invoice date, invoice number, and open invoice amounts in each aging period.
CM	
Bank Balances	This report shows the current bank account balance (as posted in Cash Management) for each of your company's bank accounts.
JC	
Cost Code Breakdown	This report has a grid for each job showing the cost code breakdown, including the original estimate, approved estimate changes, revised estimate, costs to date, variance between the estimate and the cost to date, and percent completed (based on the costs compared to the revised estimate).
Cost Type Summary	This report shows summary job cost information by cost type. A column chart shows the amounts for each cost type. A grid shows the jobs and the amounts (and % of total) for each cost type as well as the total job-to-date costs.
Job Cost Summary	This report shows summary information about job costs after you select the filters (cutoff date and job not completed as of date).* The grid shows the revised contract and estimate amounts, committed costs, cost, billed amount, billed-cost difference, profit, and profit margin.

Report	Description
Job Cost Profitability	This report helps analyze the profitability of a job by showing if the job is more or less profitable at the current stage of the job in comparison to the start of the job. This grid includes columns for Job and Description, Status, Original Contract, Original Estimate, Original Profit, Potential Price, Revised Contract, Potential Estimate, Revised Estimate, JTD Cost, Percent Complete, Cost at Complete, Profit Margin, and Profit Variance. (Available in version 18.2)
PM	
Leasing Summary	After you select the as of date and type the square footage type filters*, this report shows the occupancy. A bar chart shows the percent leased by property. A form shows the overall leased area, total area, and percent leased, as well as the number of new leases, renewals, and terminations. A grid shows this information by property.
PM Aging - Lease Detail	After you select the aging basis and aging date filters*, this report has an expandable grid for each property showing the amounts due for each unit in each aging period.
PM Aging Summary by Lease	After you select the aging basis and aging date filters*, this report has an expandable grid for each lease showing the amounts due in each aging period. A column chart shows the open amount by charge type. You can click a column to drill down and view the components of that charge type.
PM Aging Summary by Property	After you select the aging basis and aging date filters*, this report shows aging amounts by property. Two column charts show the stacked and unstacked aging amounts for each property. A grid shows the amounts due by property in each aging period. You can click a property to drill down and view lease aging details.
Property Occupancy	This report shows the occupancy percentage for each of your properties. A line chart shows the total monthly occupancy for all property square footage types. You can filter by property or range of months. An expandable grid shows the occupancy for each year, property, type, and month. A grid for a property shows the average occupancy by year and type.

* After you select a filter, click [**Update Results**]. If you type text for a filter, press **Enter** and then click [**Update Results**].

Enhancements in 18.2

You can import custom dashboard reports, such as those created by a consultant.

Sage now provides the Job Cost Profitability report as well as two sample dashboards that you can import, which are described in the following table.

Dashboard	Description
Financial Summary	This dashboard provides an overview of current posted data for CM, AP, AR, and JC: • A grid of the Cash Management bank balances • A line chart of the Accounts Payable Open, Invoiced, Paid, and Retainage balances each month • A column chart of the Accounts Receivable balances by aging period • A grid of up-to-date job profitability information for each job—comparing original and revised contract amounts, estimated and actual costs, percent complete, projected profit, and profit margin
Project Summary	This dashboard provides information about current jobs: • A bar chart of the open Accounts Receivable amounts by job • A column chart comparing the total estimated labor amount to the total job-to-date labor cost for all jobs in progress • A grid of up-to-date job profitability information for each job—comparing original and revised contract amounts, estimated and actual costs, percent complete, projected profit, and profit margin

Enhancements in 18.1.4

Dashboard performance has improved:

◻ It now takes only a few seconds to import Sage reports.

◻ When creating a dashboard report, navigating and scrolling through multiple data sources is much faster.

Mobile Reports

The Mobile Reports application was new for Sage 300 Construction and Real Estate Version 17.1 Rev 6. With this application, selected employees can generate and view Crystal Reports in the field using a mobile device or computer. They can also send the reports through email. See the Introduction to Mobile Reports video for more information.

To access Mobile Reports, your employees use a browser to log into the Sage Construction Central website, select **Intelligence** in the menu on the left, and then select **Mobile Reports**.

When you purchase Mobile Reports, a subscription to the Microsoft Azure Active Directory (AAD) is included. AAD provides a secure connection from your mobile device to your Sage 300 Construction and Real Estate data. You will receive an email with instructions to set up AAD and Mobile Reports. For information about setting up ADD, using License Administration to assign the Mobile Reports licenses to employees, and using Security Administration to control security for mobile, see the *Sage Construction Central Setup Guide*.

> **Note:** Mobile Reports uses your company data stored in the SQL database. You must use the SQL Replicator to copy the data stored in the Actian Pervasive database and replicate it into a SQL database. See page 25 for information about the SQL Replicator.

You can learn more about Mobile Reports and the Sage Construction Central website through complimentary online courses offered by Sage University.

For information about purchasing Mobile Reports, contact your authorized Sage business partner or your Sage customer account manager at 1-800-858-7095 (or email CREsales@sage.com).

Resolved issues in 18.1.2

You should upgrade to version 18.1.2 or later in order to fully run the Mobile Reports application.

MyAssistant

There were no major updates to MyAssistant for this release.

ODBC

There were no major updates to ODBC for this release.

> **Important!** If you use a program that pulls data using ODBC (including third-party programs such as Sage Paperless Construction, MyAssistant, or TimberScan), you need to install a hotfix as well as an update from the third-party program. See Knowledgebase article 91721 for the hotfix and more information.

Resolved issues in 18.2

When data from multiple companies is displayed in an Excel spreadsheet, the General Ledger account numbers are now displayed in the correct format even when the companies use different GL formats.

Payroll (Australia)

> **Important!** The sample cheque forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal and state laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your cheque forms as needed to ensure compliance.

Payroll (Canada)

> **Important!** The sample cheque forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal and provincial laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your cheque forms as needed to ensure compliance.

There were no major updates to Canadian Payroll for this release.

> **Note:** If you have Indian employees, their Code 71 year-to-date earnings should be subtracted from their provincial year-to-date gross on the T4 form for their primary province. For more information, see Sage Knowlegebase article 96713.

Payroll (United States)

> **Important!** The sample check forms that come with Sage 300 Construction and Real Estate may not be fully compliant with all federal, state, and local laws and other requirements, which can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify your check forms as needed to ensure compliance.

Enhancements in 18.4

New W-4 form for 2020

The IRS issued a new W-4 form that bases federal tax withholding on amounts instead of on exemptions. The new form must be used for employees hired after January 1, 2020 or employees who change their federal tax withholding information. If an employee uses this new form, select the **Use W-4 amounts** check box on the **Entry Info** tab of their **Employee Setup** window, and then enter the amounts for **Dependents**, **Other income**, and **Deductions** on that tab. If they selected the check box in step 2(c) of the W-4 form, also select one of the new **Filing status** codes on that tab.

> **Tip:** View the Form W-4, Employee's Withholding Certificate video for more information.

EEO-1 Component 2 reporting

If your company needs to file EEO-1 Component 2 reports, there is now a new task on the menu. Select **Tasks > EEO Reporting (Component 2 Data)**, and then follow the steps in the online help topic to create the report file to submit to the EEOC (Equal Employment Opportunity Commission).

New York City tax allowances

When the number of allowances the employee claims for New York City taxes is different from the number claimed for New York state taxes, you can now specify the New York City allowances using the **Misc tax code** and **Misc tax code 2** in the **Employee Setup - State** window for New York.

Note about the Oregon State Transportation Improvement Fund tax

Starting July 2018, there is a new tax for the Oregon State Transportation Improvement Fund (ORTIF) that applies to residents of Oregon and non-residents of Oregon who provide services in Oregon. If this tax applies to your employees, you will need to make the changes so that Oregon taxes will automatically calculate when the work state on the job or the employee work state is Oregon. See Knowledgebase article 91505 for more information.

If you have employees who live in Oregon but do not work in Oregon, they will still owe this tax. To properly withhold this tax, set up a reciprocity agreement between their work state and Oregon. See Knowledgebase article 21191 for more information. If you do not withhold this tax, the employees will be assessed this tax on their Oregon income tax forms.

Resolved issues in 18.2.2

ACA information carryover

If you entered information in the **Affordable Care Act Compliance Details** window, when you close the year, the program automatically copies that information to the new year. This includes whether the employee was enrolled in an employer-sponsored self-insured plan.

Resolved issues in 18.1.1

Payroll form fixes

- W-2 form processing is now faster.
- Processing quarterly forms for employees who are Minnesota residents but worked in South Dakota no longer stops and displays an error.

Project Management

Enhancements in 18.4

Estimates imported from Sage Estimating (SQL)

You can now import an estimate from Sage Estimating (SQL) 19.12 into a Project Management change request. Click the **Price/Cost Estimate** tab of the **Change Request** window, click [**Estimate Change Request**], and choose an import option.

Resolved issues in 18.1.1

Moving jobs

The Move Jobs task runs faster, even for large jobs in large databases.

Property Management

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

Resolved issues in 18.3

Form 1098 printing issue

If you print 1098 forms, the amount for Box 10 is now printing in that box instead of in Box 9.

Purchasing

There were no major updates to Purchasing for this release.

Resolved issues in 18.4

Amount of PO receipt with add-on taxes

Previously, when an Inventory-related PO receipt that had add-on taxes was posted, the tax addon amounts were not included in the amount sent to Inventory. This caused a difference between the amount sent to the GL Inventory account and the amount sent to the Inventory sub-ledger, which undervalued the Inventory and thus the cost to jobs when items were issued from Inventory. Now, the amount of the taxes associated with the addon is correctly included in the amount sent to Inventory.

Resolved issues in 18.1.2

You can now run the Purchasing reports using SQL data.

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.

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

There were no major updates to Server Migration for this release.

Service Management

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

Resolved issues in 18.1.1

Work orders

- You can now include non-alphanumeric characters (such as dashes and periods) for **Alternative Work Order**.
- When work orders are printed, they are now marked as printed—so they are not printed again when unprinted work orders are sent to the printer.

SQL Replicator

The SQL Replicator tool was new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to take the Sage 300 Construction and Real Estate data stored in the Actian Pervasive database and replicate it into a SQL database.

You can specify that Crystal Reports on the menus use the SQL database (instead of the Pervasive database) by selecting the **Use SQL** check box. When you access the data from SQL, reports generally run faster. The mobile applications also access the data from SQL.

> **Important!** Before you can run the SQL Replicator, use the Sage Universal SQL Installer to install an instance of the SQL database to hold your data.
>
> The size of the replicated data is larger than the original Pervasive data because replicator adds views and indexes the data. To determine if you can use SQL Server Express, add the size of the PVData, POIV Data, SM Data folders and the master.qxm file together for each company. If the sum is greater than 6 GB, you should use the full SQL Server version. See Knowledgebase article 85584 for more information

To configure and start Replicator, use the System Administrator tool; see for more information.

The first full replication may take some time. Depending on your settings, replicator may perform additional replications on a schedule or whenever your employees make changes to your company's data so that the SQL database contains the updated data. The subsequent replications may be almost instantaneous.

Several improvements were made for version 18.1. It is now easier to set up, has improved performance, and supports larger databases. Only if your company is in Canada or Australia, will you need to enter the Windows credentials of the person who will run the replicator. This version also has enhanced logging and diagnostic tools for administration.

You can control security for SQL Replicator in Security Administration. If you set up new roles or make other changes to security, click [**Sync Security**] on the **Replicator Configuration** tab in the **System Administrator** window so that the changes are also applied to the SQL database.

For more information, see the *Sage SQL Replicator Setup Guide* and the Introduction to Sage SQL Replicator video.

Enhancements in 18.3

You can now configure the replicator logs, which is helpful if you need to minimize the size of the replicator logs. See Knowledgebase article 100109 for more information.

Replicator now uses Redis for queuing data changes with Minimal or Live mode, which improves replicator stability. This also fixes an issue with replicating multiple companies at once with these modes.

Enhancements in 18.2

In version 18.2, you can select a replication mode to control the timing or the files replicated for a specific database:

1. In the table on the **Replicator Configuration** tab in the **System Administrator** window, make a selection in the **Mode** column for the company folder.

2. Click [**Save Configuration**].

3. If you selected **Scheduled** for **Mode**, you can use the Task Scheduler to change the schedule frequency and start time.

The initial replication will start at the scheduled time. If you want to start it immediately, click [**Start**].

Enhancements in 18.1.4

Initial replication and Pervasive data change detection logic use multi-threading, which improves replication performance.

Enhancements in 18.1.1

In version 18.1, you have the option to manually control the replication schedule for a specific database:

1. In the table on the **Replicator Configuration** tab in the **System Administrator** window, click the **On Demand** check box for the company folder that you want to only replicate on demand.

2. Click [**Start**] to begin the replication.

3. After the Replicator has completed for that database, it will not replicate again until you click [**Start**] in this window again.

> **Note:** To schedule an on-demand replication, locate the task that is created in the Task Scheduler and modify it to re-run the on-demand replication at a scheduled time. Replicator will look for and synch any changes that occurred since the previous replication.

Resolved issues in 18.1.2

- Replicator now correctly replicates data even when there was older SQL data that was replicated using version 17.1.

- Replicator now correctly replicates data when the SQL server instance is on a different server from your Accounting server.

Resolved issues in 18.1.1

- Replicator now correctly replicates fields with customized labels.
- Users that are set up in security after the initial replication are now able to access SQL data and use the mobile applications as expected with their security permissions.

Known issues

File Security

At this time, file security for the replicated SQL data is not supported.

SM history data

At this time, the Replicator does not replicate Service Management history data.

System Administrator

The System Administrator tool was new for Sage 300 Construction and Real Estate Version 17.1. Use this tool to:

- Configure and start SQL Replicator; see the enhancements for the SQL Replicator on page 25 for more information.
- Perform a comprehensive backup of your company data (including the global folder, Service Management, Purchasing, and Inventory data), plus the SQL data that was replicated.
- Restore the data from the backup.

You can use the backup and restore procedures in System Administrator even if you do not use the Replicator. See the Using System Administrator to back up and restore your data video for more information.

> **Note:** You can still use File Tools to back up and restore your company data stored in Pervasive. However, File Tools does not back up and restore the SQL data.

> **Important!** As with any backup tool, we recommend that you validate and test the backup to ensure that the process is working properly. Environmental issues and files in use can affect the integrity of a backup.
> Restoring your business data requires advanced knowledge of the Actian Pervasive, Microsoft SQL, and Sage 300 Construction and Real Estate file systems. We strongly recommend you undertake this process with a knowledgeable professional, such as your business partner, certified consultant, or Sage Customer Service representative.

To access the tool (on the server), select the **Sage Administration** program group (from the **Start** menu), and then select **System Administrator**.

> **Tip:** For information about using System Administrator, see the online help by clicking ⍰ (the Help button) in the upper-right corner of the window.

Enhancements in 18.3

There is now a button on the **Replicator Configuration** tab so you can quickly access the Task Scheduler.

Enhancements in 18.2

On the **Replicator Configuration** tab, you can now select a replication mode to control the timing or the files replicated for a specific database.

Enhancements in 18.1.4

When Sage managed service accounts in SQL server need to be reset, you can now use the new [**Repair Services**] button instead of needing to call Support.

Enhancements in 18.1.2

You no longer need to manually stop Replicator before running a backup in System Administrator.