



# **Sage 300 Construction and Real Estate**

## **(formerly Sage Timberline Office)**

Version 20

Release Notes

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Versions 20.1, 20.2, 20.3, 20.4, 20.5

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# Contents: Version 20 Release Notes

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<b>Release Overview</b> .....	1
<b>Support and Assistance</b> .....	3
<b>Installation</b> .....	5
<b>Database changes</b> .....	7
<b>General Topics</b> .....	7
<b>Accounts Payable</b> .....	9
<b>Accounts Receivable</b> .....	11
<b>Address Book</b> .....	11
<b>Billing</b> .....	11
<b>Cash Management</b> .....	12
<b>Contracts</b> .....	12
<b>Desktop</b> .....	12
<b>Equipment Cost</b> .....	12
<b>Financial Statements</b> .....	12
<b>General Ledger</b> .....	12
<b>Information Assistant</b> .....	13
<b>Inquiry</b> .....	13
<b>Inventory</b> .....	13
<b>Job Cost</b> .....	14
<b>License Administration</b> .....	14
<b>Mobile Dashboard</b> .....	15
<b>Mobile Reports</b> .....	20
<b>ODBC</b> .....	21
<b>Payroll (Australia)</b> .....	21
<b>Payroll (Canada)</b> .....	22

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<b>Payroll (United States)</b> .....	<b>24</b>
<b>Project Management</b> .....	<b>27</b>
<b>Property Management</b> .....	<b>27</b>
<b>Purchasing</b> .....	<b>27</b>
<b>Remote Time Entry</b> .....	<b>28</b>
<b>Report Designer and Reporting</b> .....	<b>28</b>
<b>Sage System Verifier</b> .....	<b>28</b>
<b>Security Administration</b> .....	<b>28</b>
<b>Server Migration</b> .....	<b>28</b>
<b>Service Management</b> .....	<b>29</b>
<b>SQL Replicator</b> .....	<b>29</b>
<b>System Administrator</b> .....	<b>31</b>

# 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 20 of Sage 300 Construction and Real Estate includes enhancements and software fixes. We recommend that you install version 20.5 to get the latest updates and bug fixes. Highlights of versions 20.1, 20.2, 20.3, 20.4, and 20.5 are listed in the following table.

### Highlights of the release versions

Version	Application / area	Page
20.5	General	Enhancement; see <a href="#">page 7</a>
20.5	Payroll (Canada)	Resolved issue; see <a href="#">page 22</a>
20.5	Payroll (United States)	Resolved issues; see <a href="#">page 24</a>
20.5	Property Management	Resolved issue; see <a href="#">page 27</a>
20.4	Accounts Payable	Resolved issue; see <a href="#">page 9</a>
20.4	Job Cost	Resolved issue; see <a href="#">page 14</a>
20.4	Payroll (Canada)	Resolved issue; see <a href="#">page 22</a>
20.4	Payroll (United States)	California Pay Data reporting and resolved issues; see <a href="#">page 24</a>
20.3	Accounts Payable	1099 changes and enhancements; see <a href="#">page 9</a>
20.3	ODBC	Enhancement; see <a href="#">page 21</a>

Version	Application / area	Page
20.3	Payroll (Canada)	T4 form changes; see <a href="#">page 22</a>
20.3	Payroll (United States)	W-2 form changes and enhancements; see <a href="#">page 25</a>
20.2	General / APIs	API enhancements; see <a href="#">page 7</a>
20.2	Accounts Payable	Resolved issues; see <a href="#">page 10</a>
20.2	Accounts Receivable	Resolved issues; see <a href="#">page 11</a>
20.2	Billing	Resolved issue; see <a href="#">page 11</a>
20.2	ODBC	Resolved issue; see <a href="#">page 21</a>
20.2	Payroll (Australia)	Enhancement; see <a href="#">page 21</a>
20.2	Payroll (Canada)	Resolved issues; see <a href="#">page 23</a>
20.2	Payroll (United States)	Resolved issues; see <a href="#">page 25</a>
20.2	Project Management	Resolved issue; see <a href="#">page 27</a>
20.2	Property Management	Resolved issue; see <a href="#">page 27</a>
20.2	Service Management	Resolved issues; see <a href="#">page 29</a>
20.1	Installation	Enhancements and resolved issues; see <a href="#">page 7</a>
20.1	General	Resolved issue; see <a href="#">page 7</a>
20.1	Inquiry	Resolved issue; see <a href="#">page 13</a>
20.1	Inventory	Resolved issues; see <a href="#">page 13</a>
20.1	Job Cost	Resolved issue; see <a href="#">page 14</a>
20.1	Payroll (Canada)	Resolved issues; see <a href="#">page 23</a>
20.1	Payroll (United States)	Resolved issues; see <a href="#">page 26</a>
20.1	Purchasing	Resolved issue; see <a href="#">page 27</a>
20.1	Service Management	Resolved issue; see <a href="#">page 29</a>

Version	Application / area	Page
20.1	SQL Replicator	New improved version and resolved issues; see <a href="#">page 29</a>
20.1	System Administrator	Updated tool; see <a href="#">page 31</a> .

**Tip:** You can also view the [Release Highlights video](#) to learn more about the changes in version 20.1.

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# 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 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:** Visit the [Year-end Center](#) to locate the links to complimentary Year-end Procedures training for step-by-step instructions about how to complete year-end closing tasks.

## 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.

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# 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.

**Note:** When you install version 20.1, 20.2, 20.3, 20.4, or 20.5, 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**. 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](mailto:CREsales@sage.com)). You can use the 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) and run the **SageSQLReplicator.exe** file. 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 Sage 300 Construction and Real Estate (Accounting) version 18.1, 18.2, or 18.3, or 18.4, you can upgrade directly to version 20.

If you are on version 16.1 or 17.1, we recommend that you upgrade to 18.4 before upgrading to version 20:

1. Back up your data, upgrade to 18.4, and upgrade your data (including Inventory, Purchasing, and Service Management data).
2. Back up your data again and upgrade to version 20.

**Note:** If you are on a version that is earlier than 16.1, we recommend that you contact your Business Partner or [Sage Expert Services](#) 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 Estimating

If you also use Sage Estimating (SQL) on the same machines, you may need to upgrade to a compatible version. You can use Estimating 18.12, 19.11, 19.12, 20.1, or 21.1 with Sage 300 Construction and Real Estate version 20.5 and higher. These versions use Crystal Reports runtime SP22 for running Crystal reports.

For more information, see the **Compatible versions** section in **Chapter 1** of the [User's Guide](#).

**Note:** There is no version of Sage Estimating (Pervasive) that is compatible with Sage 300 Construction and Real Estate version 20.

## Sage Document Management

Document Management was retired on December 31, 2019; see [Knowledgebase article 91616](#) for more information about the retirement.

You can still run Document Management in a standalone environment; see [Knowledgebase article 91608](#) for more information. **DO NOT** install Sage 300 Construction and Real Estate Accounting version 20 on the same machine as Document Management.

## Enhancements and resolved issues in version 20.1

- The names of the Accounting zip file and folder now show the full version number instead of the Rev number to make it easier to track which version the file installs.
- A silent install (using a script to silently install the software on client workstations) now removes two additional old files so the new files are correctly installed.

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## 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*.

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## General Topics

### Support links updated in version 20.5

Links for remote support access have been updated throughout your software.

### API enhancements in version 20.2

The Application Programming Interfaces (APIs) were enhanced so they no longer rely on Sage SQL Replicator.

If you add Sage Service Operations or Sage Field Operations (which help onsite and offsite teams more efficiently manage daily field reports and work orders), you will no longer be required to install Sage SQL Replicator.

### Resolved issue in version 20.1

When your system cannot communicate with the Sage entitlement server and you see a message about expiring licenses, the message now includes instructions about using License Administrator to fix the issue. (This was also fixed in 18.4 Update 4.)

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# Accounts Payable

## Resolved issue in version 20.4

### Invoice import

Previously, the import of AP invoices would sometimes stop running, not process all invoices, and hang while showing a percent complete in the background task. Now, the import completes normally, so all invoices are processed.

## Enhancements in version 20.3

### 1099 forms

For 2020, the Internal Revenue Service reissued form 1099-NEC for non-employee compensation. You now have the ability to select that form on the **1099 Settings** tab of the **Vendor Setup** window. The choices for **Form Type** are now:

- 1099-NEC Non-Employee Compensation
- 1099-MISC Rents/Gross Proceeds
- 1099-INT Interest
- 1099-DIV Dividend

If you already selected Non-Employee Compensation for the vendor, the correct form will automatically be selected after you upgrade to version 20.3.

If you need to report gross proceeds to this vendor (you selected the **Gross Proceeds Paid To An Attorney** check box), you must also select **1099-MISC Rents/Gross Proceeds** for **Form Type**. Consult with your accountant and refer to the IRS 1099 instructions at <https://www.irs.gov/pub/irs-pdf/i1099msc.pdf> for more information.

### Business names

To accommodate longer business names, the maximum lengths of the following names were increased to 70 characters:

- **Recipient Tax ID Name** on the **1099 Settings** tab of the **Vendor Setup** window
- **Business Name Line 1** and **Business Name Line 2** of the **T5018 Settings** tab of the **Vendor Setup** window

## Reports

The following reports were updated to use the longer business names, refer to the updated 1099 form, or use the EFT payment date as well as the check date.

- AP 1099 Preparation Report by Fiscal Entity.rpt
- AP 1099 Preparation Report by Prefix A.rpt
- AP 1099 Preparation Report by Prefix AB.rpt
- AP 1099 Preparation Report by Vendor.rpt
- AP CPRS Preparation Report.rpt
- AP Vendor Setup.rpt
- AP 1099 This Yr Amt Pd by VendorRecon (AP).rpt

For more information about the 1099 Preparation reports, see [Knowledgebase article 50350](#).

## Resolved issues in version 20.2

### Compliance

- If you customized the **Misc Compliance Type** list and the total characters in the descriptions exceeds 999, you can now successfully access the **Misc Compliance** tab when tracking compliance. See [Knowledgebase article 105229](#) for more information.
- The Misc Compliance Items by Vendor report now shows items out of compliance when they are marked as **Required** or **Required for Final Compliance** but have not been received. See [Knowledgebase article 47496](#) for more information.

### Aatrix forms

- When you are prompted for an Aatrix update and run the update, any new form types for new government reporting requirements will now appear in the Aatrix forms list for you to select. (This was also fixed in 18.4 Update 5.)
-

## Accounts Receivable

### Resolved issues in version 20.2

- When you run the Adjust Receivables task and un-apply or void a cash receipt, the entries are now created against the correct invoice. See [Knowledgebase article 81284](#) for more information.
  - The AR Sales Tax Summary report now excludes amounts for stored materials that are already included in the Total Billed amounts. See [Knowledgebase article 104503](#) for more information.
  - When a Service Management invoice is voided in Accounts Receivable, the note that is automatically written to Service Management now contains the correct information, including a valid date. Replicator can now successfully replicate the SM Notes table. See [Knowledgebase article 92490](#) for more information.
  - When a Service Management invoice is voided in Accounts Receivable, the SM transactions that are created no longer have the same row ID and row version as the original transactions. See [Knowledgebase article 104175](#) for more information.
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## Address Book

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

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## Billing

### Resolved issue in version in 20.2

When printing a contract-based invoice where the balance to finish is \$100 million or greater, the balance to finish is no longer cut off on the report. See [Knowledgebase article 98732](#) for more information.

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## Cash Management

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

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## Contracts

There were no major updates to Contracts for this release.

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## Desktop

There were no major updates to Desktop for this release.

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## Equipment Cost

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

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## Financial Statements

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

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## General Ledger

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

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## Information Assistant

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

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## Inquiry

### Resolved issue in version 20.1

When you export an inquiry, you can now select the location where the file is saved.

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## Inventory

### Resolved issues in version 20.1

- The extended cost on imported stock issues is now correctly calculated, even when the stock issue had a negative quantity on hand. (This was also fixed in 18.4 Update 4.)
  - If you do not have Project Management, you no longer see an error message when you quick add a job to an order in Purchasing or Inventory. (This was also fixed in 18.4 Update 4.)
-

## Job Cost

### Resolved issue in version 20.4

#### Job setup with custom descriptions

If you use blank custom descriptions for job-related labels, you no longer see an error message when opening the **Job Setup** window and the labels appear correctly. See [Knowledgebase article 103320](#) for more information. (This was also fixed in 20.3 Update 1.)

### Resolved issue in version 20.1

If the **Allow entry in GL** check box is selected for any accounts in the **General Ledger Account Setup** window, Job Cost no longer closes unexpectedly when selecting General Ledger accounts in the **Job Setup** window. See [Knowledgebase article 101399](#) for more information. (This was also fixed in 18.4 Update 3.)

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## 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 20](#)), assign these licenses to employees on the **Mobile Licenses** tab.

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

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## 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 29](#) 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](mailto: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. You can also import custom dashboard reports, such as those created by a consultant.

### Sage 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.
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.*

Report	Description
AR	
AR Aging-Customer Detail	<p>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.</p>
CM	
Bank Balances	<p>This report shows the current bank account balance (as posted in Cash Management) for each of your company's bank accounts.</p>
JC	
Cost Code Breakdown	<p>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).</p>
Cost Type Summary	<p>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.</p>
Job Cost Summary	<p>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.</p>
Job Cost Profitability	<p>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)</p>

Report	Description
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]**.

## Sage dashboards

Sage provides two sample dashboards that you can import, which are described in the following table.

**Sage sample dashboards**

Dashboard	Description
Financial Summary	<p>This dashboard provides an overview of current posted data for CM, AP, AR, and JC:</p> <ul style="list-style-type: none"> <li>• A grid of the Cash Management bank balances</li> <li>• A line chart of the Accounts Payable Open, Invoiced, Paid, and Retainage balances each month</li> <li>• A column chart of the Accounts Receivable balances by aging period</li> <li>• 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</li> </ul>
Project Summary	<p>This dashboard provides information about current jobs:</p> <ul style="list-style-type: none"> <li>• A bar chart of the open Accounts Receivable amounts by job</li> <li>• A column chart comparing the total estimated labor amount to the total job-to-date labor cost for all jobs in progress</li> <li>• 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</li> </ul>

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## 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 29](#) 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](mailto:CREsales@sage.com)).

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## ODBC

### Enhancement in version 20.3

You can now add an employee tax record through ODBC.

### Resolved issue in version 20.2

ODBC connections no longer create "Authenticating user ID" entries in the log file when the connection string includes **SilentLogging=1**, so the log file size does not grow as fast. See [Knowledgebase article 104356](#) for more information.)

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## 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.

### Enhancement in 20.2

In order to report payments related to COVID-19 (JobKeeper), additional other allowances were added.

In the **Single Touch Payroll Settings** window, click [**Other Allowances**], and then click [**Additional Allowances**]. You can then use one of the JobKeeper allowances provided in the table or insert another row in the table for a new allowance. (This was also fixed in 20.1 Update 1.)

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## 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.

### Resolved issue in version 20.5

#### Payroll messaging

Messaging when generating or regenerating Direct Deposits has improved.

### Resolved issue in version 20.4

#### Aatrix history

Previously, when starting an Aatrix eFile and Reporting task, you might not see some saved Aatrix reports. Now, reports are saved in the correct folder so that you can access them later. If you cannot Aatrix reports that you previously saved, see [Knowledgebase article 109361](#) for more information. (This was also fixed in 20.3 Update 1.)

### Enhancements in version 20.3

#### T4 forms

T4 forms must now include Other Information codes with amounts employees received during specific date ranges so the Canada Revenue Agency can validate payments for the Canada Emergency Wage Subsidy (CEWS), Canada Emergency Response Benefit (CERB), and Canada Emergency Student Benefit (CESB). When you install version 20.3 and upgrade your data files, there will be a new **CQ** code with an amount of **Employment Income** in the **Other Information Boxes** area on the **Amounts** tab of the **Modify T4 Formats** window. When Aatrix processes the T4 information, they will assign code 57, 58, 59, or 60 (or any future codes) based on the cheque dates. See [Sage Knowledgebase article 106589](#) for more information.

The **Other Information Boxes** area now contains room for nine (instead of six) codes and amounts.

## Resolved issues in version 20.2

### Aatrix forms

- When you are prompted for an Aatrix update and run the update, any new form types for new government reporting requirements will now appear in the Aatrix forms list for you to select. (This was also fixed in 18.4 Update 5.)

### Reports

- The PR Union reports no longer include employees who did not work during the period reported. See [Knowledgebase article 68072](#) for more information.
- The PR Labor Distribution report now always shows the correct Gross Pay amount (without including the Reimbursement and Accrual Pay amounts). See [Knowledgebase article 103411](#) for more information.
- The PR Subject to Date Range report now always includes the employee names, even when the person running the report does not have permission to the jobs. See [Knowledgebase article 104430](#) for more information.

## Resolved issues in version 20.1

- The year-to-date gross amount on a paycheck is now correctly calculated by adding the gross amount of the paycheck to the previous year-to-date gross amount. (This was also fixed in 18.4 Update 1.)
  - You can now view your company's historical tax filings in Aatrix.
  - When Aatrix introduces a new form type, you no longer see an error message. You can continue printing from Aatrix. (This was also fixed in 18.4 Update 4.)
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## 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.

### Resolved issues in version 20.5

#### Connecticut

The correct amount prints in box 14 on Form W-2 for Connecticut Paid Family Medical Leave.

#### Payroll messaging

Messaging when generating or regenerating Direct Deposits has improved.

### Enhancements and resolved issues in version 20.4

#### California Pay Data reporting

The new California Pay Data report is similar to the federal EEO-1 Component 2 report (which is not currently used). These reports group employees by ethnicity, race, and gender, as well as job category and pay band. However, the California report includes the choice of **Non-binary** for gender, so this choice was added for **Gender** in the **Employee Setup** window

If your company needs to file California Pay Data reports, select **Tasks > EEO/Pay Data Reporting**, and then follow the steps in the online help topic to create the report file to upload to the California portal.

For more information about reporting requirements, see the [California Pay Data Reporting website](#).

#### Hourly fringe rates on state certified reports

In versions 20.1, 20.2, and 20.3, hourly fringe rates were calculated using the Basis on the check fringe instead of the Total Hours on the check. Now, you can use either method. See [Knowledgebase article 108599](#) for more information. (This was also fixed in 20.3 Update 1.)

## Aatrix history

Previously, when starting an Aatrix eFile and Reporting task, you might not see some saved Aatrix reports. Now, reports are saved in the correct folder so that you can access them later. If you cannot Aatrix reports that you previously saved, see [Knowledgebase article 109361](#) for more information. (This was also fixed in 20.3 Update 1.)

## Enhancements in version 20.3

### W-2 forms

Box 14 on W-2 forms can now include descriptions and amounts for qualifying sick leave or family leave paid pursuant to the Families First Coronavirus Response Act. The **Box 14** area on the **Amounts** tab of the **Modify W-2 Forms** window now contains room for six (instead of three) codes and amounts.

### New York check stubs

New York state law now requires contractors and subcontractors to provide employees with information about the supplement rate (in addition to the prevailing wage) for their particular job classification on each pay stub. This information will be shown after "**PW/FRG Rate**" on the stubs. See [Knowledgebase article 106254](#) for more information. new KB is 106254

### Termination reason

In addition to entering the date when an employee was terminated, you can now select the **Reason** for the termination on the **Misc Info** tab of the **Employee Setup** window.

### Note about changes to Affordable Care Act (ACA) forms

The IRS added six new Offer of Coverage codes for 1095-C forms. If your company offers an Individual Coverage Health Reimbursement Arrangement (HRA), select the appropriate new code in the ACA preparer within Aatrix. If you select code 1L, 1M, or 1N for an employee, you must also enter the ZIP code of the employee's residence. If you select code 1O, 1P, or 1Q, you must also enter the ZIP code of the employee's primary site of employment. See [Knowledgebase article 108227](#) for more information and links to the IRS web pages.

## Resolved issues in version 20.2

### Aatrix forms

- When you are prompted for an Aatrix update and run the update, any new form types for new government reporting requirements (such as for Paid Family and Medical Leave in

Washington and Massachusetts) will now appear in the Aatrix forms list for you to select. (This was also fixed in 18.4 Update 5.)

## Reports

- The PR Union reports no longer include employees who did not work during the period reported. See [Knowledgebase article 68072](#) for more information.
- The PR Labor Distribution report now always shows the correct Gross Pay amount (without including the Reimbursement and Accrual Pay amounts). See [Knowledgebase article 103411](#) for more information.
- The PR Subject to Date Range report now always includes the employee names, even if record level security is used for the Job field on the Employee record. See [Knowledgebase article 104430](#) for more information.

## Resolved issues in version 20.1

- The year-to-date gross amount on a paycheck is now correctly calculated by adding the gross amount of the paycheck to the year-to-date gross amount. (This was also fixed in 18.4 Update 1.)
  - Employer State Unemployment Insurance taxes no longer calculate over the wage limit, even when the employer portion of the tax has a different limit than the employee portion, when the employees work in multiple states with SUI taxes, or when the employees work in states with both State Unemployment Insurance and Paid Family Leave (PFL) taxes. (This was also fixed in 18.4 Update 4.)
  - For employees who use the new W-4 form (the **Use W-4 amounts** check box is selected), the federal withholding amounts are now calculated correctly even in the following situations:
    - The exemptions are set to zero. (This was also fixed in 18.4 Update 2.)
    - There is a **Dependents** amount. (This was also fixed in 18.4 Update 3.)
  - For employees who use the new W-4 form (the **Use W-4 amounts** check box is selected) and live in a state that bases taxes on the new W-4 form, the state withholding amounts are now calculated correctly. (This was also fixed in 18.4 Update 3.)
  - When Aatrix introduces a new form type, you no longer see an error message. You can continue printing from Aatrix. (This was also fixed in 18.4 Update 4.)
  - When you generate certain Department of Labor reports (such as the Washington Department of Labor Certified Payroll eFile Report or the California Department of Industrial Relations Certified Payroll report), the hourly fringe rate is now correctly calculated when hours include both "certified" and "non-certified" hours.
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## Project Management

### Resolved issue in version 20.2

#### Compliance

If you customized the **Misc Compliance Type** list and the total characters in the descriptions exceeds 999, you can now successfully access the **Misc Compliance** tab when tracking compliance. See [Knowledgebase article 105229](#) for more information.

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## Property Management

### Resolved issue in version 20.5

#### Property Management Help

Year-end Help topics have been updated and improved.

### Resolved issue in version 20.2

#### Aatrix forms

When you are prompted for an Aatrix update and run the update, any new form types for new government reporting requirements will now appear in the Aatrix forms list for you to select. (This was also fixed in 18.4 Update 5.)

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## Purchasing

### Resolved issue in version 20.1

If you do not have Project Management, you no longer see an error message when you quick add a job to an order in Purchasing or Inventory. (This was also fixed in 18.4 Update 4.)

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## Remote Time Entry

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

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## Report Designer and Reporting

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

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## Sage System Verifier

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

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## Security Administration

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

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## Server Migration

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

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# Service Management

## Resolved issues in version 20.2

- When a Service Management invoice is voided in Accounts Receivable, the note that is automatically written to Service Management now contains the correct information, including a valid date. Replicator can now successfully replicate the SM Notes table. See [Knowledgebase article 92490](#) for more information.
- When a Service Management invoice is voided in Accounts Receivable, the SM transactions that are created no longer have the same row ID and row version as the original transactions. See [Knowledgebase article 104175](#) for more information.

## Resolved issue in version 20.1

You can now print the SM Service Site Contact Consumer Privacy Report (CR).rpt to a file or print it to SQL as well as preview or print the report on a printer.

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# SQL Replicator

Sage SQL Replicator 2.0 is an improved version of the replicator that was introduced with Sage 300 Construction and Real Estate Version 17.1. Use the replicator to copy your Sage 300 Construction and Real Estate data stored in the Actian Pervasive database into a SQL database, which enables faster data access for reports. The data is also available for mobile applications, such as Sage Mobile Dashboard and Sage Mobile Reports..

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.

**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. Also install SQL Replicator 2.0 by downloading the **SageSQLReplicator.exe** file and running the installation on your Sage 300 Construction and Real Estate Accounting server.

If you used an earlier version of Sage SQL Replicator, follow the steps in [Knowledgebase article 104917 \(Preparing your SQL data prior to upgrading to Replicator 2.0\)](#) before you install.

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 PVDData, 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 save space, you can configure replicator so that only certain tables are replicated.

To configure and start Replicator, use the System Administrator tool, which links to the **Configuration Manager** window; see [page 31](#) for more information.

The first full replication may take some time. Depending on its configuration, 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.

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 Settings** tab in the **System Administrator** window so that the changes are also applied to the SQL database.

For more information about installing and configuring Replicator, see the [Sage SQL Replicator Setup Guide](#).

**Note:** Because Sage SQL Replicator now has a separate installer, future updates to the replicator can be installed without having to install a new version of Sage 300 Construction and Real Estate.

## Resolved issues in version 20.1

- Within Replicator, local paths (not UNC paths) are now always used when comparing databases for changes and determining table rows to be replicated.
- Equipment Cost specification custom fields are now replicated into SQL.
- The CM bank account ID is no longer encrypted by Sage SQL Replicator, so reports (such as the CM Bank Account Balance Verification report) that use this field for linking can be run against the SQL database.
- Service Management history tables can now be replicated.

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## System Administrator

This version includes an updated System Administrator tool, which was introduced in Version 17.1. It still contains the **Backup** and **Restore** tabs to use to 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 as well as restore the data from the backup.

Each company database shown in the table on the updated **Replicator Settings** tab now contains the **Configure** button that you click to connect to the new **Configuration Manager** window, which you now use to configure and control SQL Replicator. See [page 29](#) for more information about SQL Replicator.

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

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