



# Sage 300 Construction and Real Estate (formerly Sage Timberline Office)

## Version 15.1

Release Notes

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Version 15.1

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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 any known issues.

In addition to reading this document, read the supporting documentation before you install. See [“Supporting documentation”](#) (the next section).

## About this release

The 15.1 release of Sage 300 Construction and Real Estate includes enhancements and software fixes. For information about the changes made in a specific application, refer to the appropriate section in this document. Highlights of this release are listed in the following table.

Application	Features and enhancements
Job Cost	<a href="#">“Commitment documents” on page 9</a> <a href="#">“Job Setup window” on page 9</a>
Payroll - U.S.	<a href="#">“Electronic version of W-2 forms” on page 11</a>
Project Management	<a href="#">“Commitment documents” on page 12</a>

You can also view the [Release Highlights video](#) to learn more about the new features and enhancements.

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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 information about system requirements, security, Crystal Reports, and ODBC as well as installation steps for Sage 300 Construction and Real Estate and Sage Estimating.

You can access a [complete library of supported product documents](#). **NOTE: The 15.1 documents are not available yet.**

## 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 icon button), or press F1 to display the help topic for that window.
- In an application, select **Help > Help Topics**.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding 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.sagesoftwareuniversity.com/>.

Contact your business partner for local training.

## Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.

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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.

Sage 300 Construction and Real Estate version 15.1 includes installation of Pervasive 11. Your server and workstations must have Internet access to install and use this software.



**CAUTION: Residential Management** - There is no 15.1 version of Residential Management at this time. DO NOT install the 15.1 version of Accounting if you use Residential Management until further notice.



**IMPORTANT:** We no longer support the Microsoft Windows XP or Microsoft Server 2003 operating systems due to changes in Microsoft support for these old operating systems. For a complete list of supported operating systems, see the [System Requirements article in the Sage Knowledgebase](#).



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

## Installation paths

If you are on version 13.1 or 14.1, you can upgrade directly to version 15.1.

If you are on version 12.1 or 9.8, you must upgrade to version 13.1 or 14.1 and upgrade your data (including Inventory, Purchasing, and Service Management data) before upgrading to version 15.1.

If you are on version 9.7, you must first upgrade to version 9.8, upgrade to version 13.1 or 14.1, and then upgrade your data (including Inventory, Purchasing, and Service Management data) before upgrading to version 15.1.

If you are on a version that is earlier than 9.7, we recommend that you contact your Business Partner for assistance.



**IMPORTANT:** If you also use Document Management, you must upgrade both products to the same version. For more information, see the **Upgrade upgrade paths** section in **Chapter 1** of the [User's Guide](#).

## Installation notes



**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.

- **Crystal Reports designs** - If you use custom Crystal Reports designs, run the new Upgrade Crystal Reports Tool *after* installing Sage 300 Construction and Real Estate 14.1 or 15.1 and upgrading your data files. See [page 5](#) for more information.

- **Document Management** - During the Accounting installation, AP invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault 15.1. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action before installing Sage 300 Construction and Real Estate.
- **Document Management** - Document Management 15.1 includes changes to DocuVault indexes, which may take a long time to complete. We recommend that you plan the timing of your Accounting and Document Management upgrades so they will complete during non-work hours.
- **Project Management Correspondence Log** - If you use the Correspondence Log and Windows Office 2010 or 2013, you must install Project Management components on your server and workstations after you install Sage 300 Construction and Real Estate 15.1. Follow the instructions in the "Install Project Management Components" section in Chapter 2 of the *User's Guide*.
- **Estimating** - If you use Sage Estimating, you must install Sage Estimating 15.1 after installing Sage 300 Construction and Real Estate 15.1.

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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*.

For information about database changes made in previous versions, see the previous Release Notes, which can be accessed from the [Product Documents page](#).

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# General Topics

## New features and enhancements

### Support for the latest operating systems


Sage 300 Construction and Real Estate is now supported on Windows 8.1, Windows 10, and Windows Server 2012 R2 operating systems.



**NOTE:** Sage 300 Construction and Real Estate is no longer supported on Windows XP or Windows Server 2003 operating systems, due to changes in Microsoft support for these old operating systems

### Incorporation of the latest version of Crystal Reports

Version 14.1 of Sage 300 Construction and Real Estate incorporates the latest version of the Crystal Reports runtime components (version 13). All CR report designs that come with Accounting, Estimating, and Residential Management were replaced with upgraded versions. Reports that took over 90 seconds to run will likely run faster using this new version.

If you have custom Crystal Reports designs, you must upgrade them before they can be used in Sage 300 Construction and Real Estate. You can use the new Upgrade Crystal Reports Tool, which is on the programs menu; click [Start], select **All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools**, right-click **Upgrade Crystal Reports**, and then select **Run as administrator**. For more information, click  (the help button) in the tool's window.



**NOTE:** The **Upgrade Crystal Reports** window displays messages about the report designs to be checked and upgraded. Not all designs will need to be upgraded. If a design cannot be upgraded, the tool displays a message in this window with the file name in red text.

If you use the Crystal Reports Designer, you will need to install the latest version, Crystal Reports For Sage 2013 SP2. This software only runs on Windows 7 SP1, Windows Server 2008, or higher operating systems (not Windows Vista). If you create new custom CR designs, use the Upgrade Crystal Reports Tool before using them in Sage 300 Construction and Real Estate. If you have problems previewing reports in Crystal Reports Designer, [log into the Sage Knowledgebase](#) and access Article 51402 for information.

## Important notes

### Remote print

If you plan to use the remote print feature, you need to change the logon account for the Sage Remote Print service on the server to one that has network permissions to print to the printers; the default Local System account may not work.

## Resolved issues

### Office 365 compatibility

The **PJ Corr Log .msi** is now installed as part of the prerequisites to ensure compatibility with Office 365. Also, you can now select **Email** as a send method in the **Send** window when you are using Office 365.

### Background Tasks window

When the **Background Tasks** window is open, information is now always displayed in the window.

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# Accounts Payable

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

## Resolved issues

### Large job and invoice numbers

Large job numbers display correctly (without a missing character) in the **Approve Invoices** window. Large invoice numbers display correctly (without a missing character) in the **Select Invoices to Pay** window.

### Canadian electronic payment file date

When generating electronic payments, the correct file creation date is now always used in the electronic payment file.

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# Accounts Receivable

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

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# Address Book

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

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## Billing

There were no major updates to Billing for this release.

### Resolved issues

#### Cost amount for WIP

You can select the **Always use cost amount when calculating WIP** check box in the **Billing Settings** window (on the **General** tab), to have the system use the cost amount first (if available) before using the unit cost when calculating the WIP amount. If the check box is cleared, the system uses the unit cost first (if available) before using the cost amount when calculating the WIP amount and the WIP unit price.

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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.

### Resolved issues

#### Load times

Custom DSK files load faster than in version 14.1 and version 13.1 Update 8 and later.

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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.

### Resolved issues

#### Updated Report

The GL Reconciliation Dashboard report can now include Accounts Payable transactions that originated in Purchasing.

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## Information Assistant

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

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## Inquiry

There were no major updates to Inquiry for this release.

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# Inventory

There were no major updates to Inventory for this release.

## Resolved issues

### Access to Printer Setup window

When you select a report to print and click [**Printer Setup**], the **Printer Setup** window now opens (without displaying an **Access is denied** message).

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# Job Cost

## New features and enhancements

### Commitment documents

You now have the ability to create a document that automatically contains field information about a specific commitment. In the **Enter Commitments** window, you select the commitment, click [**Document Designer**], select a template to use, click [**New Document**], name the new document, and click [**Create New Document**].

You can use the Document Designer to create templates with commitment fields and fields from other related database tables. You can also add text and images to the template, as well as format the text and fields in Word. Version 15.1 provides some standard templates, including a letter of intent, notice to proceed, and subcontractor agreement checklist.




**NOTE:** If you insert a regular Word table in a template, be sure to insert text or a space character in a table cell before you insert a field in that table cell. (Otherwise, when you use the template for a document, the field name will display instead of the data.)



**IMPORTANT:** To use this feature, you must have Microsoft® Word 2010 or later installed on your computer. Also, open Word directly at least once before accessing the Document Designer.

### Job Setup window

The **Job Setup** window has an improved user interface. In addition to the new colors, you can:

- Resize the window easily by dragging the window edge or corner with your mouse.
- See available tabs along the left side of the window (instead of having to scroll the tabs at the top of the window).
- See the format for the job ID next to that field when creating a new job.
- Open the selection list for a field by clicking  (the select button) in the field (instead of [**List**] at the bottom of the window).

## Resolved issues

### Deletion of commitments

You can now delete commitments even when the commitment ID starts with a vowel.

### Import estimates

You can now import estimates even when Job Cost does not find a standard item.

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## MyAssistant

There were no major updates to MyAssistant for this release.

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## ODBC

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

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## Payroll (Australia)

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

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## Payroll (Canada)

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

### Resolved issues

#### Direct deposit file creation date

When generating direct deposits, the correct file creation date is now always used in the electronic file.

#### File for T4 forms

Previously, information about all employees were included in the file sent to Aatrix for generating T4 forms. Now, the file does not include employees who were terminated prior to the period. It only includes employees who had earnings during the period.

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## Payroll (United States)

### New features and enhancements

#### Electronic version of W-2 forms

If an employee will only access his or her W-2 form electronically, you can now select the **Electronic W-2 only** check box on the **General** tab of the **Employee Setup** window. You must specify the email address of the employee. When the W-2 form is available, an email message will be sent to the employee with the link to his or her electronic W-2 form. The W-2 form for the employee will not be printed and mailed.

### Resolved issues

#### Employee ACA details

Social security numbers that start with a zero now display correctly in the **Affordable Care Act Compliance Details** window.

#### File for W-2 forms

Previously, information about all employees were included in the file sent to Aatrix for generating W-2 forms. Now, the file does not include employees who were terminated prior to the period. It only includes employees who had earnings during the period.

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# Project Management

## New features and enhancements

### Commitment documents

You now have the ability to create a document that automatically contains field information about a specific commitment. In the **Enter Commitments** window, you select the commitment, click [**Document Designer**], select a template to use, click [**New Document**], name the new document, and click [**Create New Document**].

You can use the Document Designer to create templates with commitment fields and fields from other related database tables. You can also add text and images to the template, as well as format the text and fields in Word. Version 15.1 provides some standard templates, including a letter of intent, notice to proceed, and subcontractor agreement checklist.



**NOTE:** If you insert a regular Word table in a template, be sure to insert text or a space character in a table cell before you insert a field in that table cell. (Otherwise, when you use the template for a document, the field name will display instead of the data.)



**IMPORTANT:** To use this feature, you must have Microsoft® Word 2010 or later installed on your computer. Also, open Word directly at least once before accessing the Document Designer.

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# Property Management

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

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# Purchasing

There were no major updates to Purchasing for this release.

## Resolved issues

### Access to Printer Setup window

When you select a report to print and click [**Printer Setup**], the **Printer Setup** window now opens (without displaying an **Access is denied** message).

### Posting to Job Cost

When posting purchase orders to Job Cost, you no longer get a **File Not Found** message that states the **new.jct** file does not exist.



### Capitalization of vendor IDs

Previously, when you typed a vendor ID on a receipt, the vendor ID was converted to upper case. This could cause problems when trying to post the receipt if the vendor ID was stored in the database in lower or mixed case. Now, the capitalization of the vendor ID in the database is used for receipts.

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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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## Residential Management



**CAUTION:** - There is no 15.1 version of Residential Management at this time.  
**DO NOT** install the 15.1 version of Accounting if you use Residential Management until further notice.

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## Sage Installation Manager

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

### Important notes

If you set up email notifications, you may receive many emails after an update is installed successfully. For example, if an update is successfully installed on workstations that are shut down every night, you may receive email notifications about a successful installation every morning when the users restart their workstations. You can eliminate these email notifications by clicking **Change Settings** in the Sage Installation Manager console, selecting each subscriber in the table on the **Email Notifications** tab, clicking [**Modify**], and clearing the **Installation Successful** check box.

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## Sage System Verifier

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

### Resolved issues

#### Windows 8.1 operating system

The Sage System Verifier can now run on a computer with the Windows 8.1 operating system.

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## Security Administration

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

### New features and enhancements

You can now set security to mask sensitive vendor data, such as the tax ID number and name on the **1099 Settings** tab of the **Vendor Setup** window.

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## Server Migration

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

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## Service Management

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