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sage 300

Installing Sage 300 Limited Educational Version

2021

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Installing Sage 300 Limited Educational Version

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Introduction

This guide has been designed to provide you with information for registering, installing, and licensing the Sage 300 Student Edition.

Working with this guide

You may come across some of the following icons to make your learning experience more interesting and visual:

For more information: Refers to additional resources or links where more information will be provided.

Note: Additional information provided.

Application Software Versions

Release Year

This study guide has been developed for Sage 300 Limited release 2021.

Most of the processes and concepts explained in the guide are applicable to older versions. However, some of them refer to new features and changes in the release 2020, 2019, and 2017.

Product Version

The activity data files and most of the activities were prepared with Sage 300 Limited 2021.

System Requirements

• Intel Core 2 Duo or equivalent processor

• 4 GB RAM

• Microsoft Windows 10 or later

• Microsoft .NET Framework 4.8

Note: You cannot use this edition of Sage 300 with any other edition. If you have installed another version or edition of Sage 300, you must remove it before installing this edition.

Activity Data Files

Training Data Files

Links will be sent via email once registered to the Sage Education Program.

Beyond the Classroom

Your continued success is important to us. Sage has the following additional resources for you to continue your learning.

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Lesson 1: Student Registration

This lesson explains how to register for the Sage Education Program. Once successfully registered, an email with links to download Sage 300 Limited will be sent to the email used in the registration form.

Learning Objectives

By the end of this lesson, you will be able to:

- Register for the Sage Education Program
- Download Sage 300 Limited

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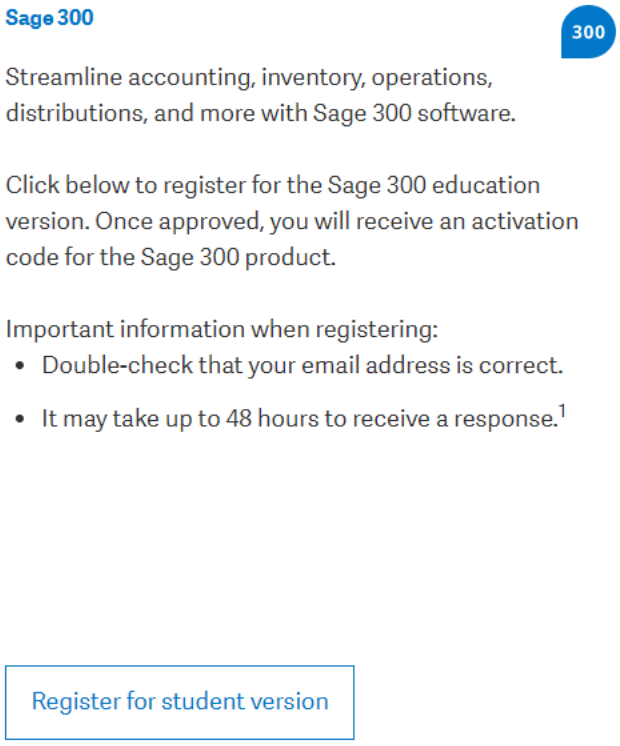
Registration

1. Visit https://www.sage.com/en-ca/about-us/education/

2. Find the section for Sage 300 and click **Register for the student version**.



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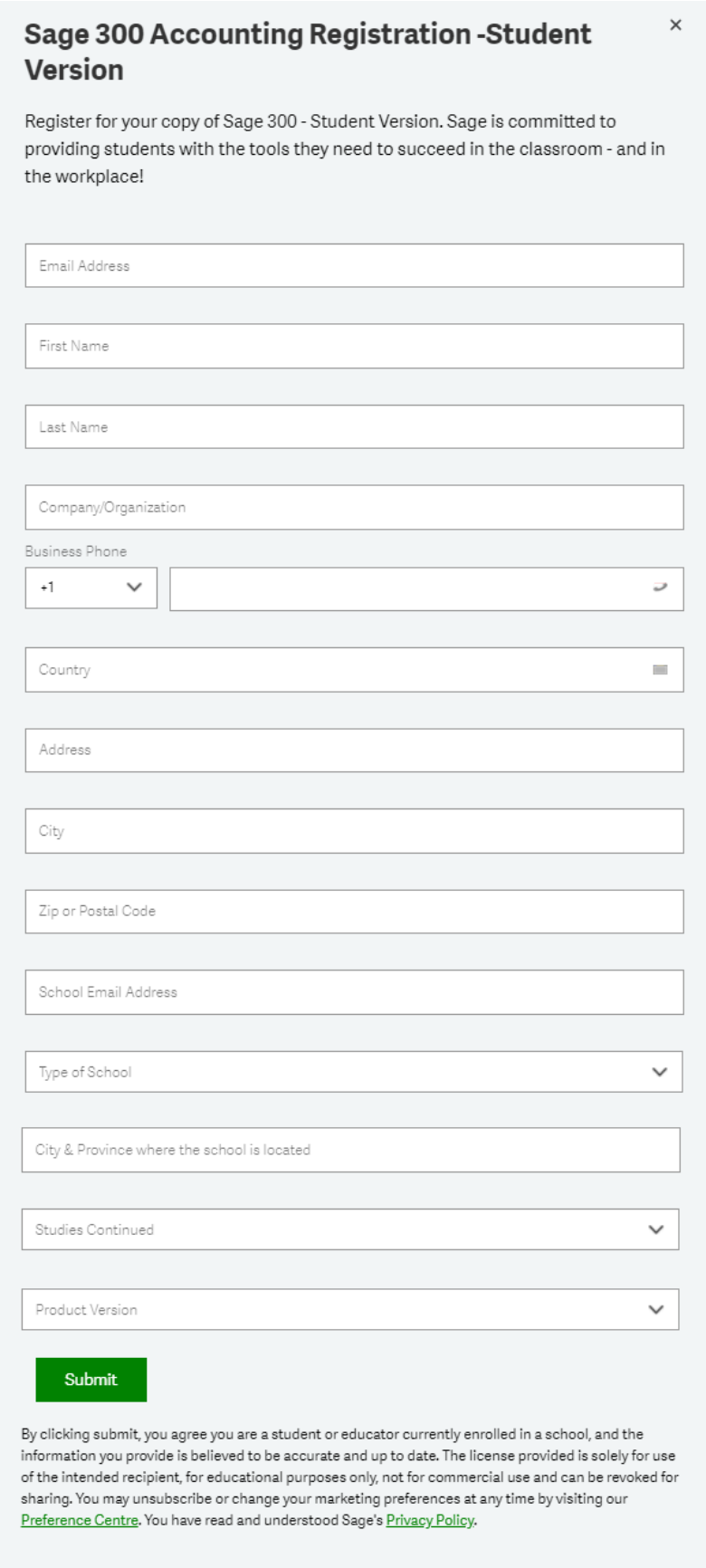
3. Complete the registration form and click **Submit**.



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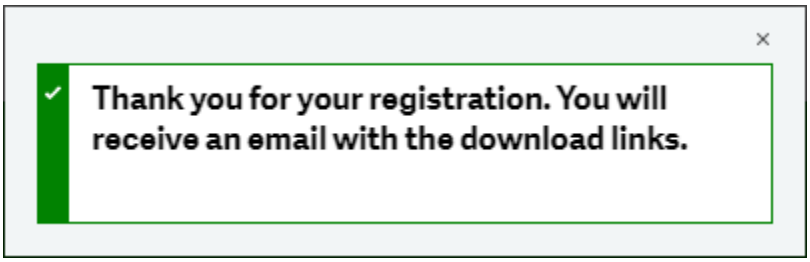
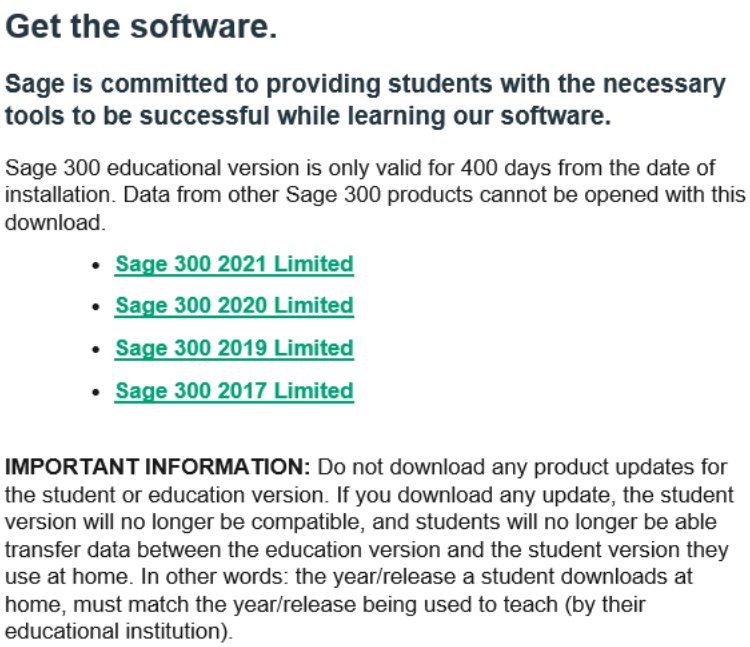
4. An email will be sent containing the links for the different versions offered of Sage 300 Limited.



5. In the email, select **Sage 300 2021 Limited** and save the file to your computer.



Get the software.

Sage is committed to providing students with the necessary tools to be successful while learning our software.

Sage 300 educational version is only valid for 400 days from the date of installation. Data from other Sage 300 products cannot be opened with this download.

- Sage 300 2021 Limited
- Sage 300 2020 Limited
- Sage 300 2019 Limited
- Sage 300 2017 Limited

IMPORTANT INFORMATION: Do not download any product updates for the student or education version. If you download any update, the student version will no longer be compatible, and students will no longer be able transfer data between the education version and the student version they use at home. In other words: the year/release a student downloads at home, must match the year/release being used to teach (by their educational institution).

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Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Multiple Choice

Mark the correct answer(s) to the question below.

1. How many days from the date of installation is the Sage 300 Student Edition valid for?

A. _____ 100 Days

B. _____ 200 Days

C. _____ 300 Days

D. _____ 400 Days

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Lesson 2: Install SQL Server 2017 Express

This lesson will provide steps on how to install SQL Server 2017 Express as the database engine.

Learning Objectives

By the end of this lesson, you will be able to:

- Install SQL Server 2017 Express with Tools
- Install SQL Management Studio

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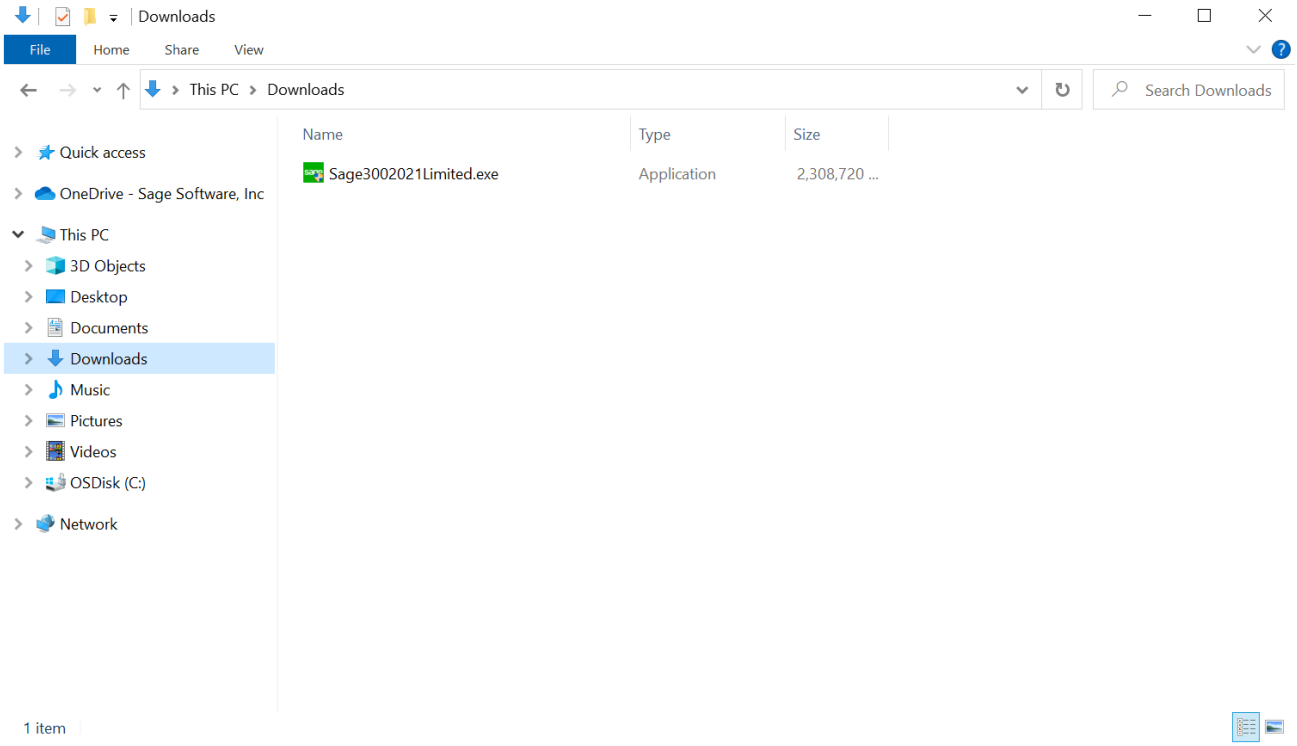
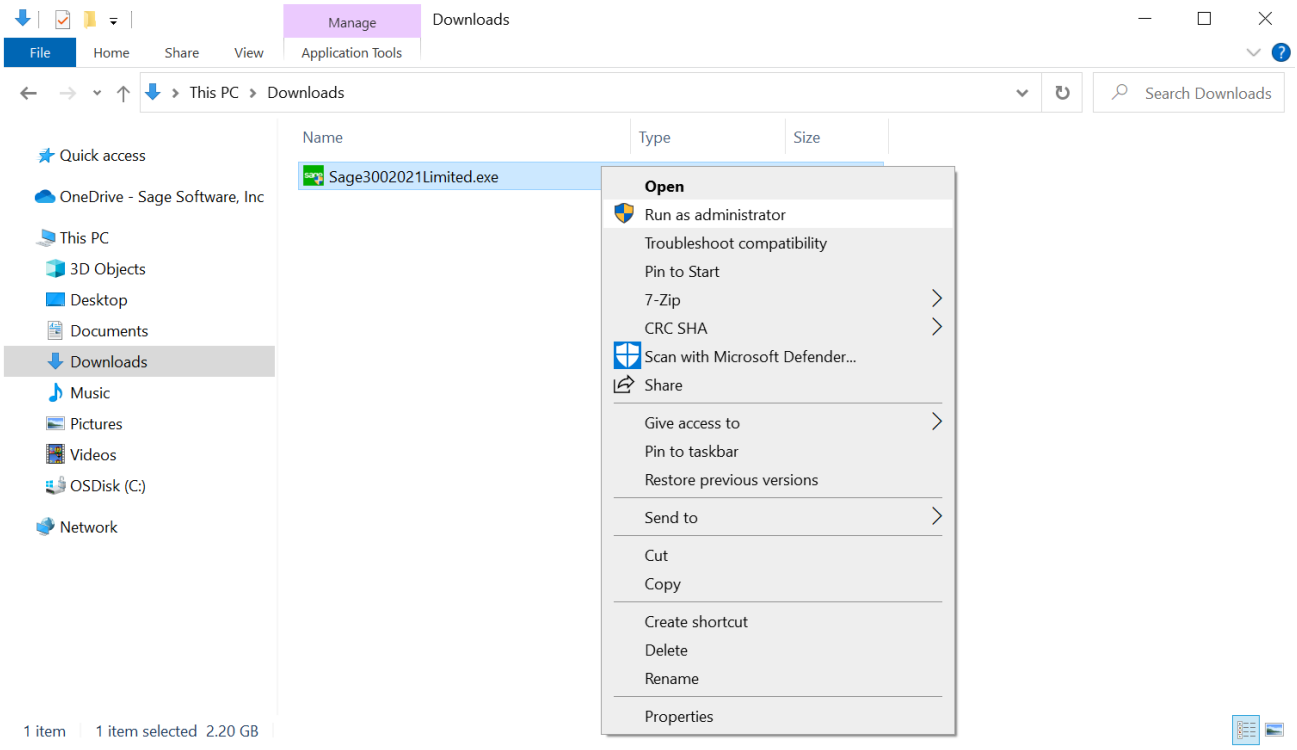
Installation of SQL Express

1. Locate the **Sage3002021Limited.exe** setup file.



2. Right click on the **Sage3002021Limted.exe** and select **Run as administrator** option.



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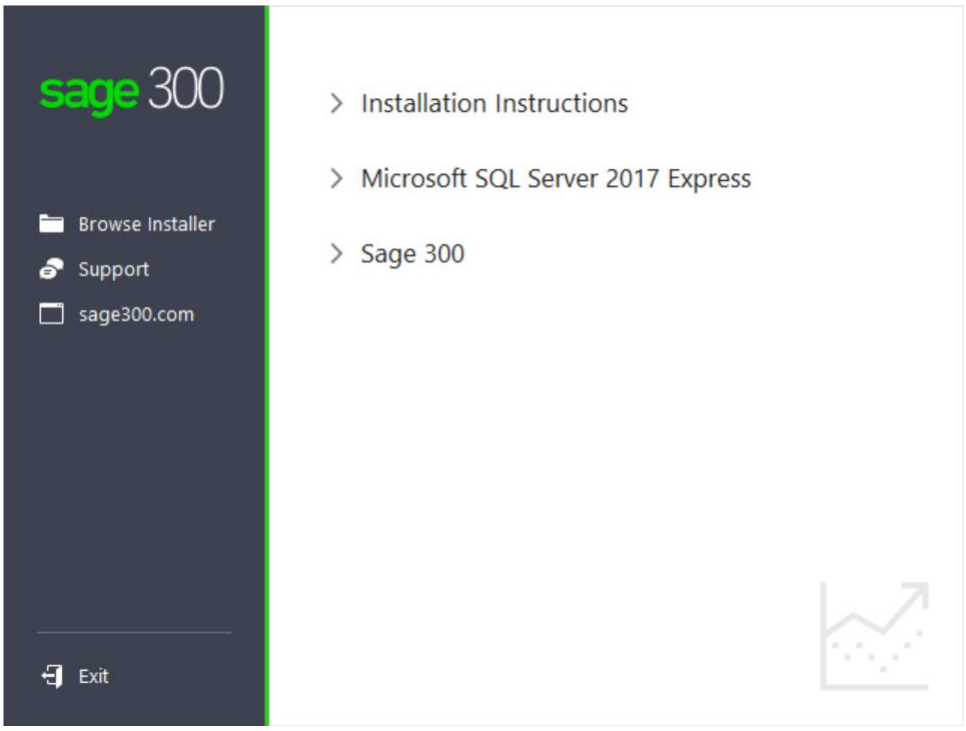
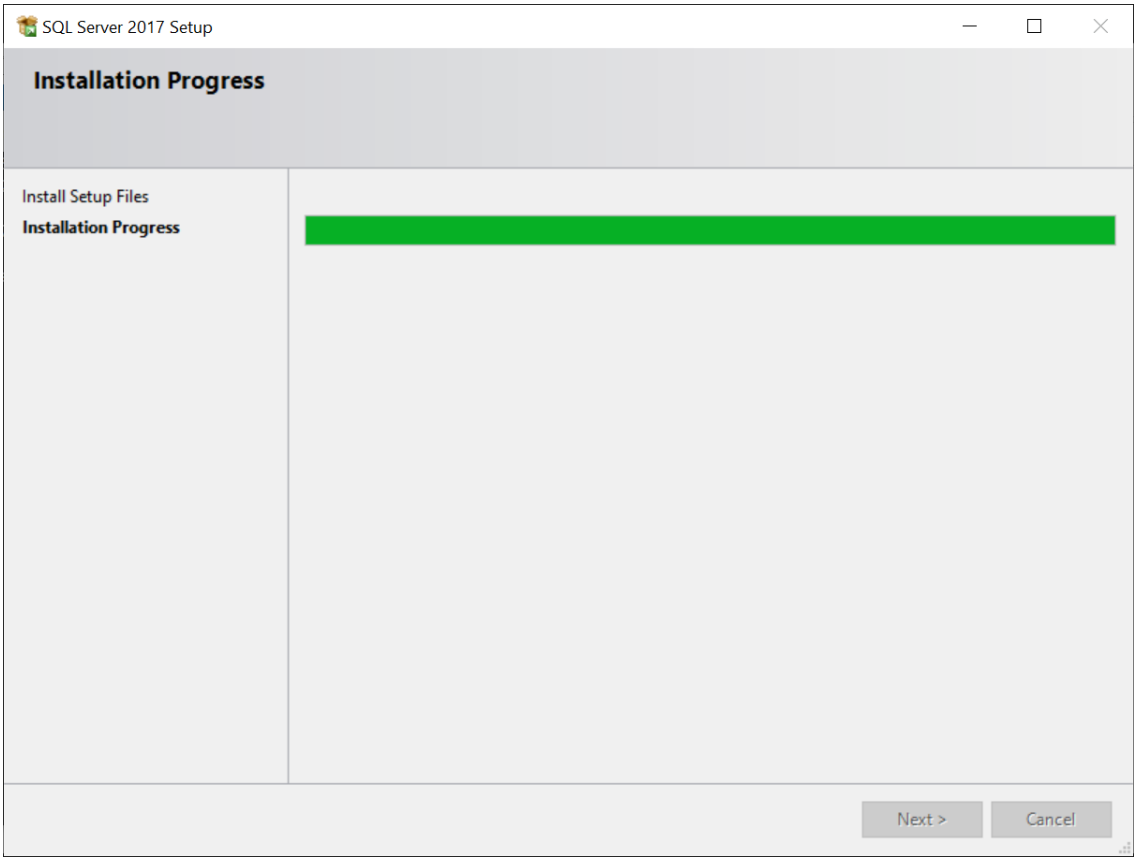
3. On the installation screen, click **Microsoft SQL Server 2017 Express** to install Windows SQL Server 2017 Express with Tools.



4. Follow the instructions to complete the installation, accepting default values.



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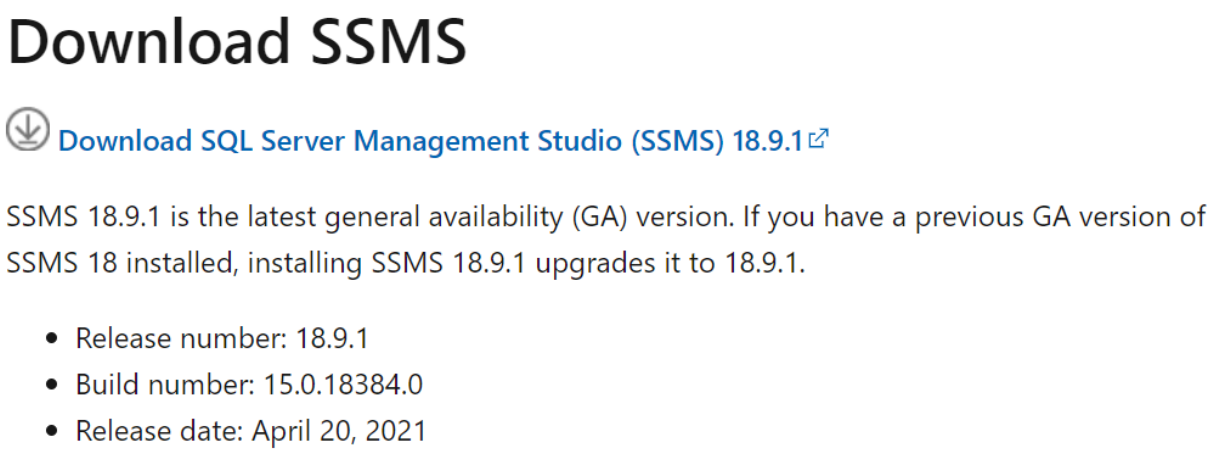
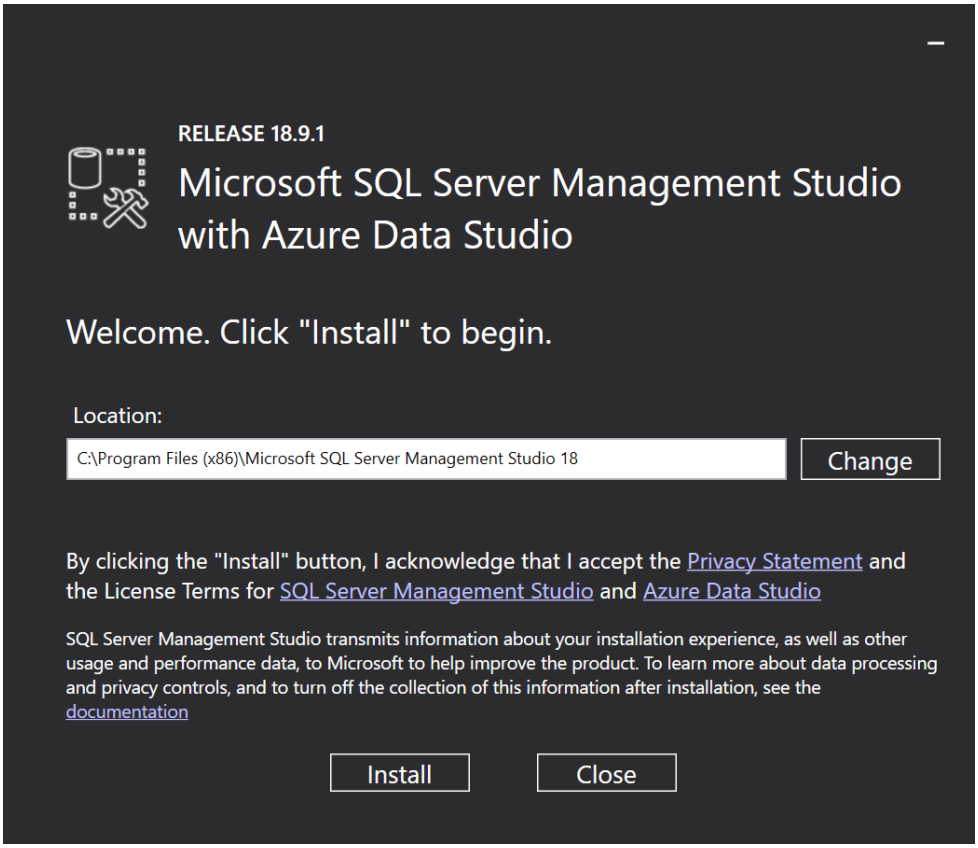
Installation of SQL Management Studio

1. Visit https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017

2. Scroll down and click the link to **Download SQL Server Management Studio (SSMS) 18.9.1**



3. Save the file and installing use the default settings.



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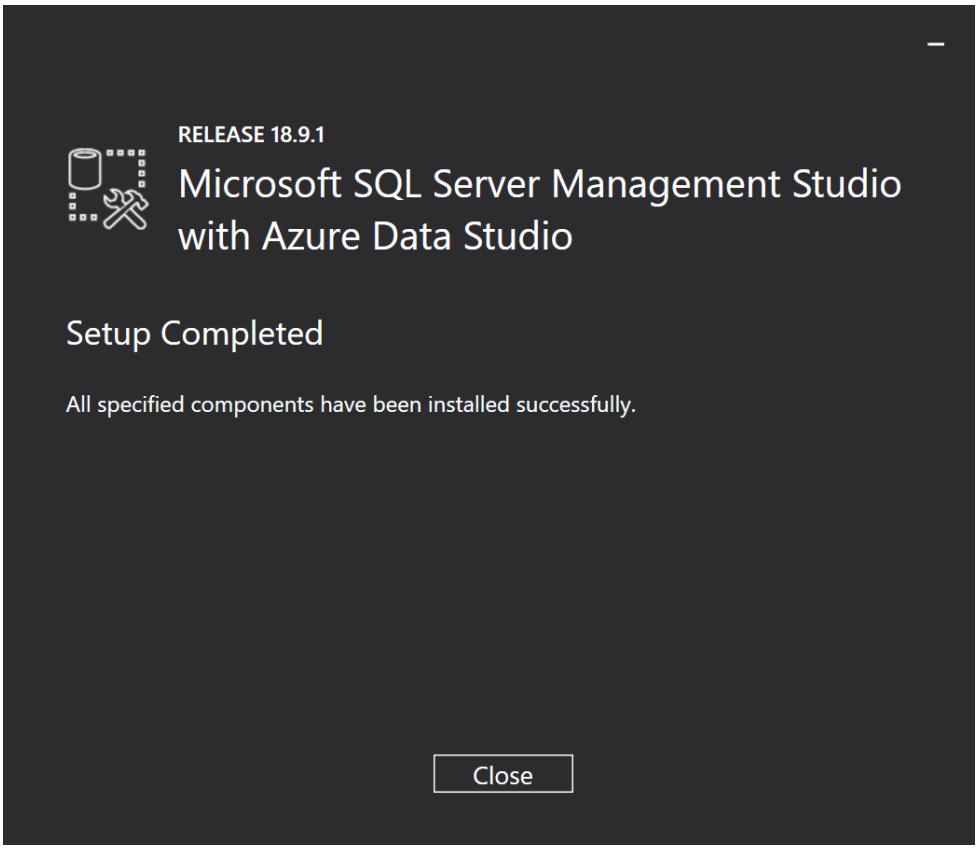
4. Once installation is complete, click **Close**.



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Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Multiple Choice

Mark the correct answer(s) to the question below.

1. What version of SQL Express is includes with the Sage 300 install?

A. _____ SQL Express 2017

B. _____ SQL Standard 2017

C. _____ SQL Premium 2017

D. _____ SQL Quantum 2017

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Lesson 3: Install Sage 300 Limited

This lesson will explain how to install and license Sage 300 Limited.

Learning Objectives

By the end of this lesson, you will be able to:

- Install and license Sage 300 Limited

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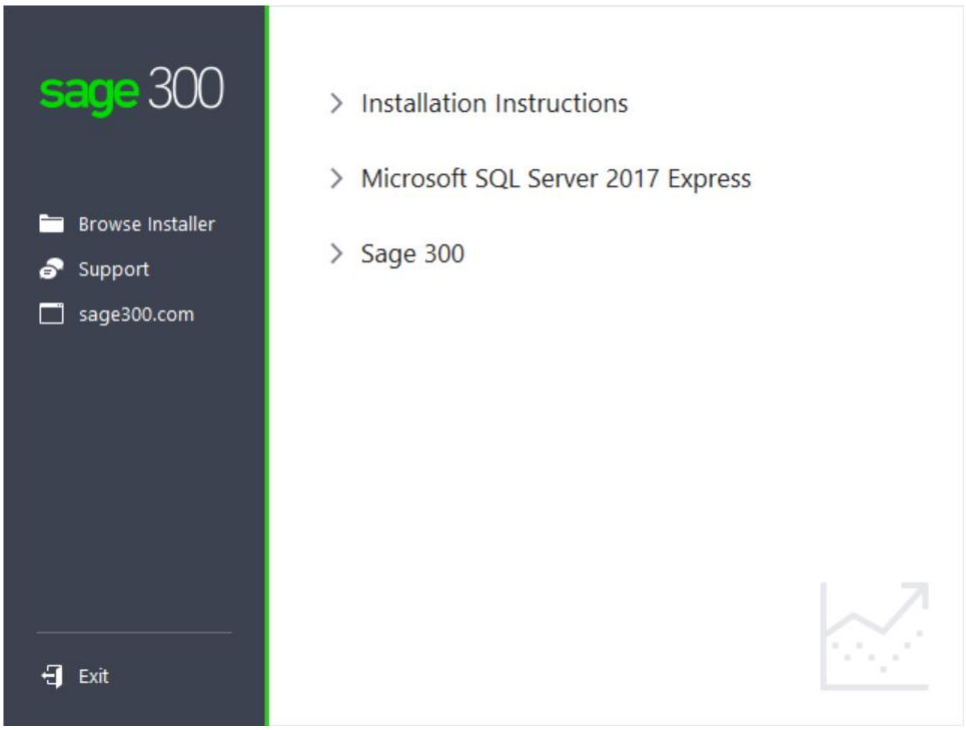
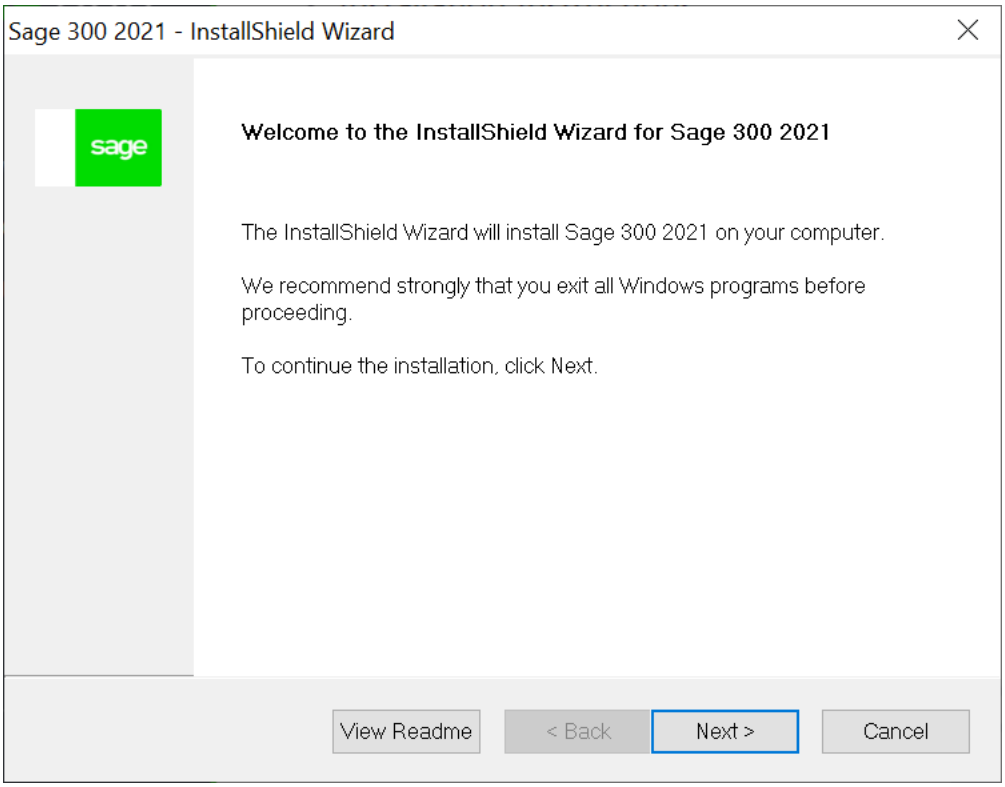
Installing and licensing Sage 300

1. On the installation screen, click **Sage 300** to install Sage 300 2021 Limited.



2. On the welcome screen, click **Next**.



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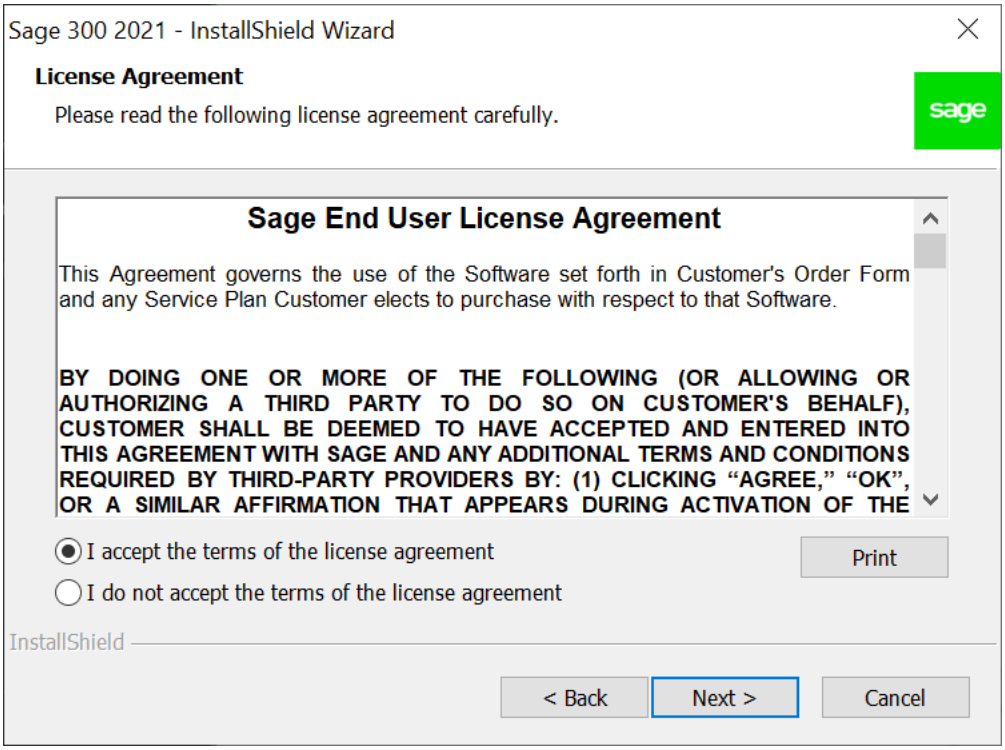
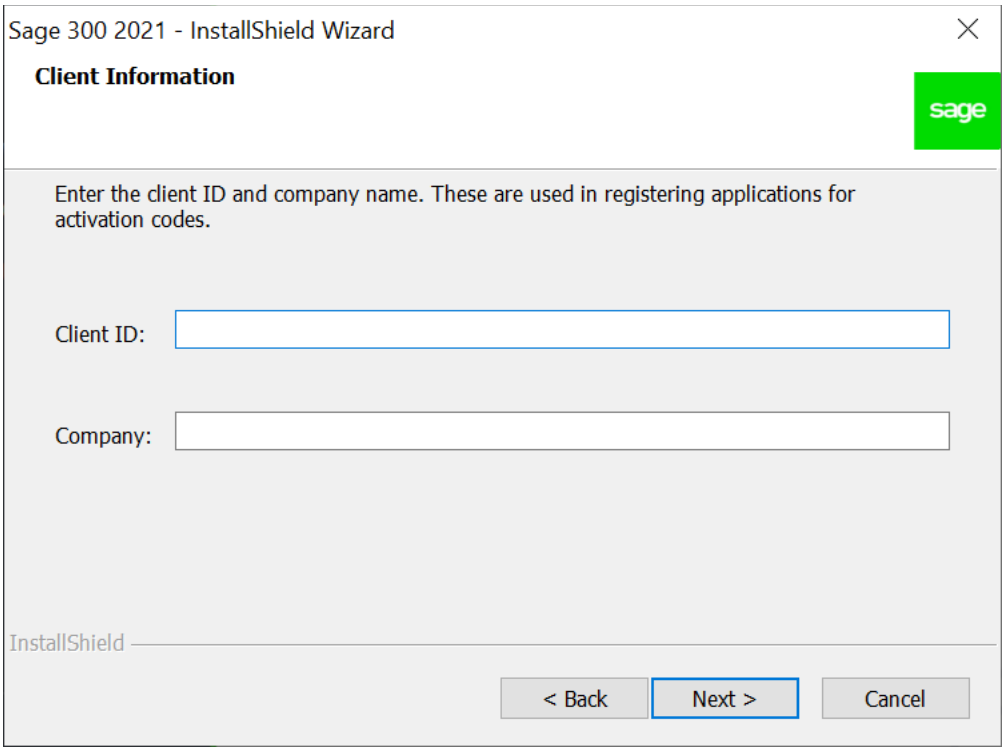
3. Select the option to accept the terms of the license agreement, and then click **Next**.



4. On the Client Information screen, enter the following information, and then click **Next**:

• Client ID: 1234567

• Company: (School name and course number)



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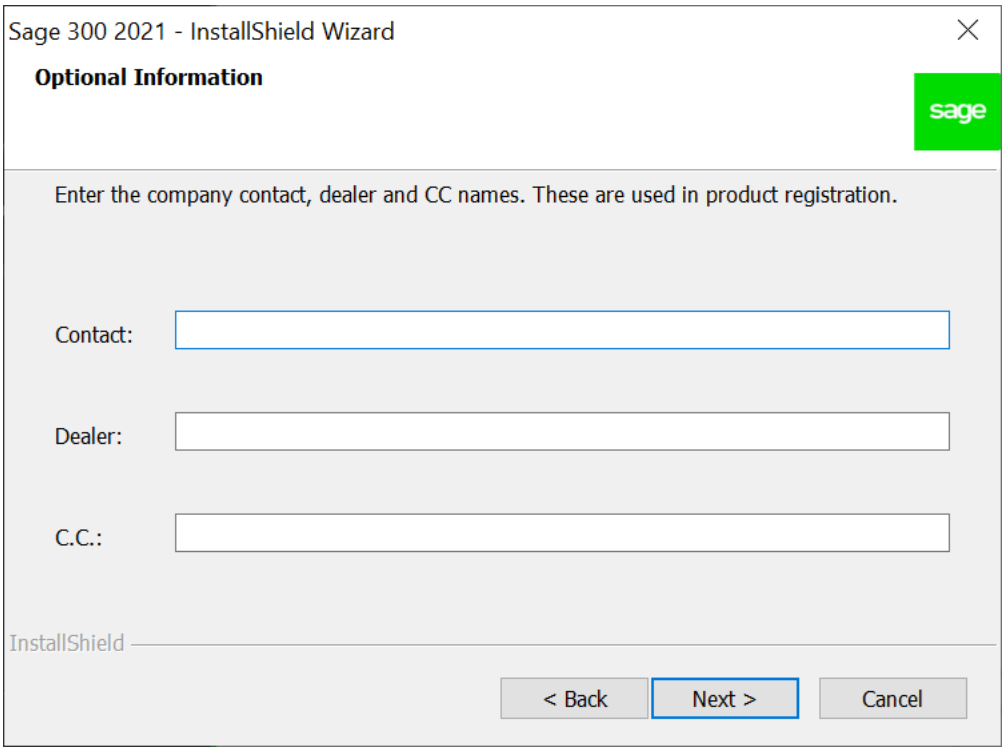
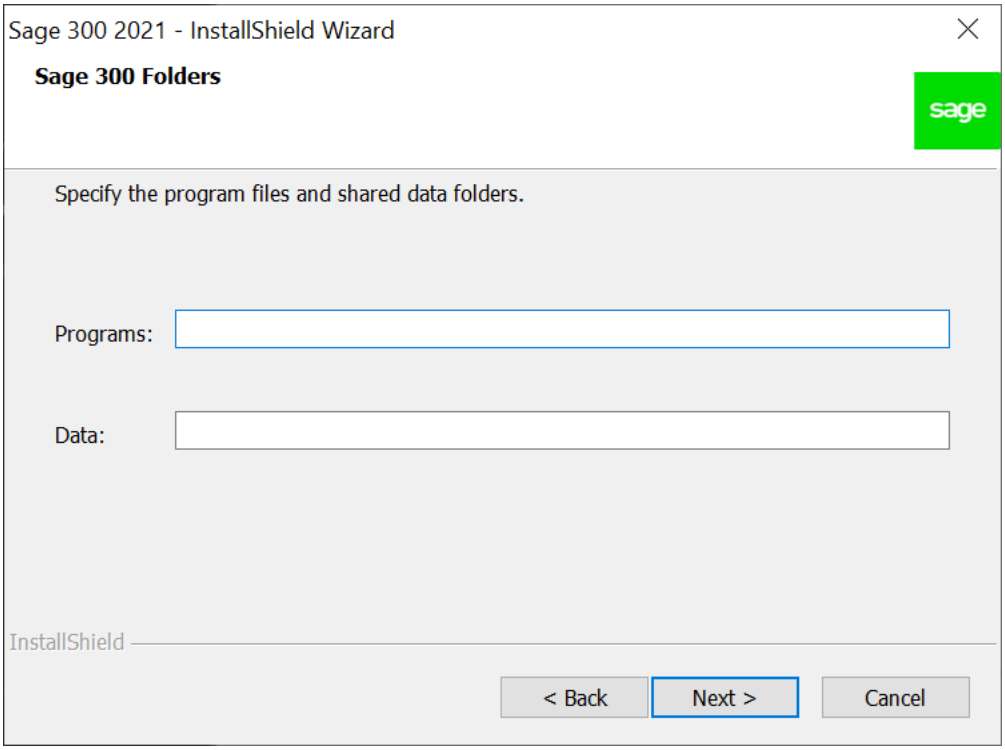
5. On the Optional Information screen, click **Next**.



6. Specify the names and locations of your program and data folders or use the default location and then click **Next**.



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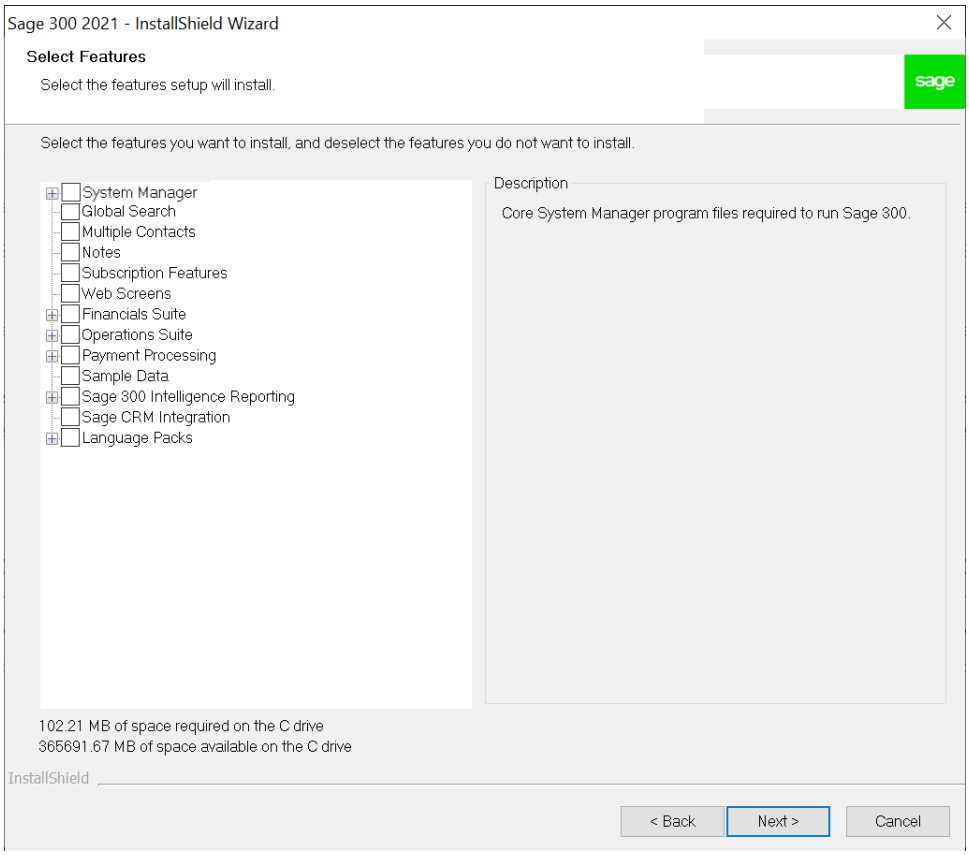
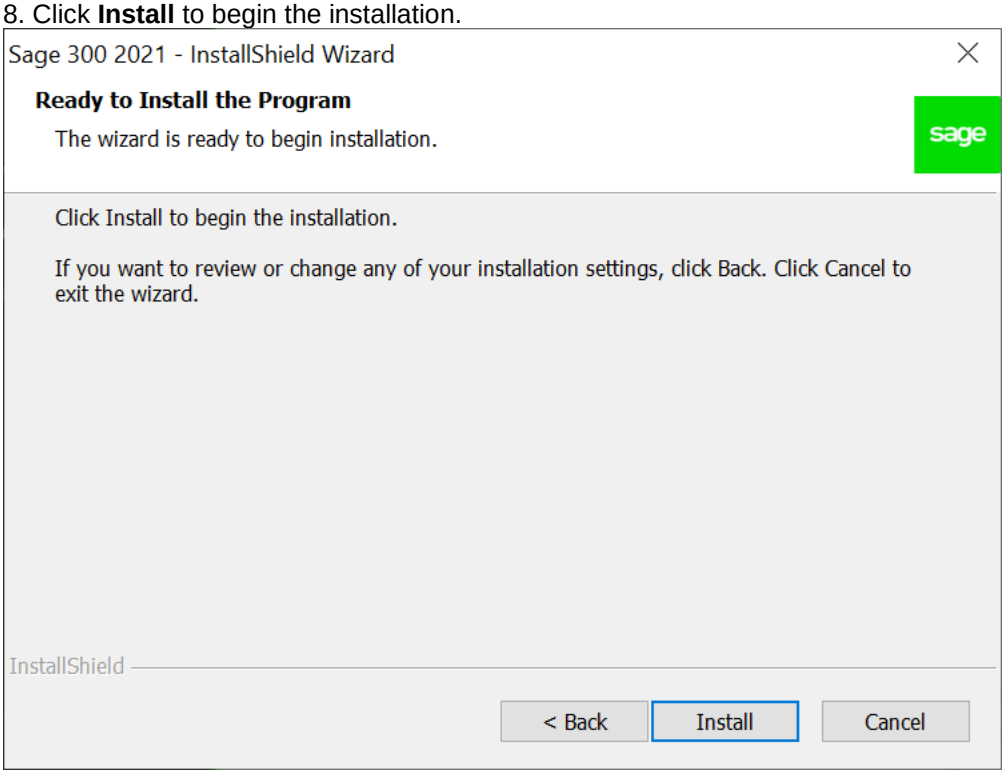
7. On the Select Features screen, click **Next** to install the features and modules that have been selected for the Limited Edition.



8. Click **Install** to begin the installation.



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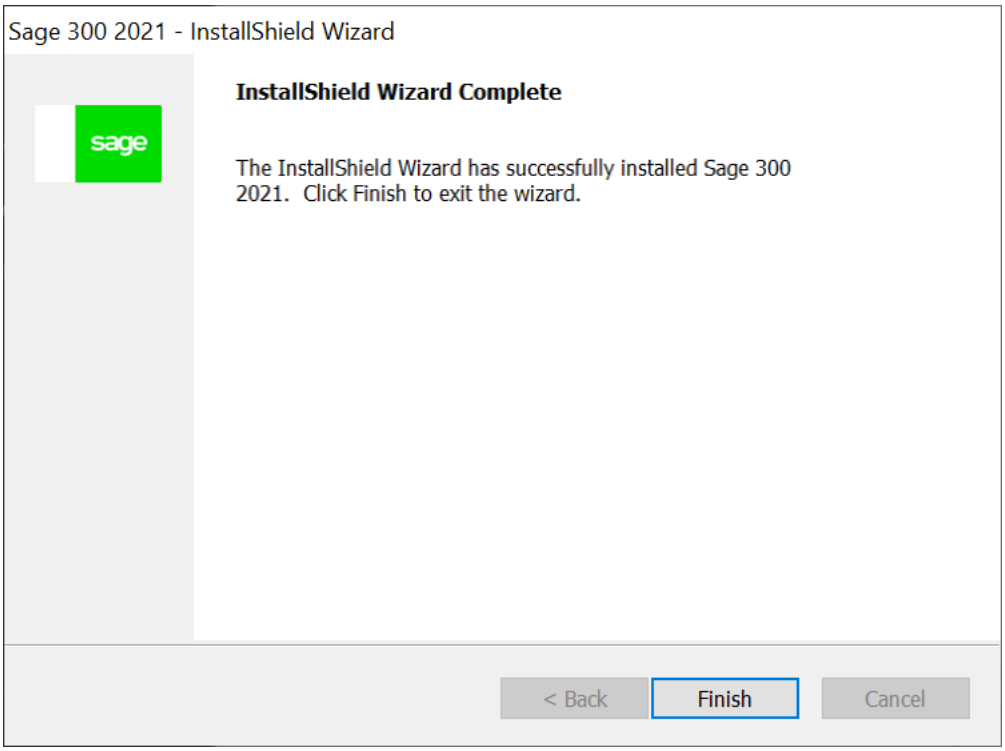
9. Click Close, and then click **Finish**.



If you do not have a supported version of Adobe Flash Player installed, the Flash Player installation screen appears. To install Flash Player, accept the terms of the license agreement, and then click Install.

Before you can open a company, you must load data. If you try to open Sage 300 and there is no data set up, a message appears saying “There are no installed organizations.”

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Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Multiple Choice

Mark the correct answer(s) to the question below.

2. What is the client ID needed to be entered in the client information screen?

A. _____ 8000000

B. _____ 4000000

C. _____ 1234567

D. _____ 0123456

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Lesson 4: Load Sample Data

In this lesson you will learn how to load sample data. This edition of Sage 300 includes a data loader utility that loads the sample data you will use.

Learning Objectives

By the end of this lesson, you will be able to:

- Load sample data set using the data loader utility

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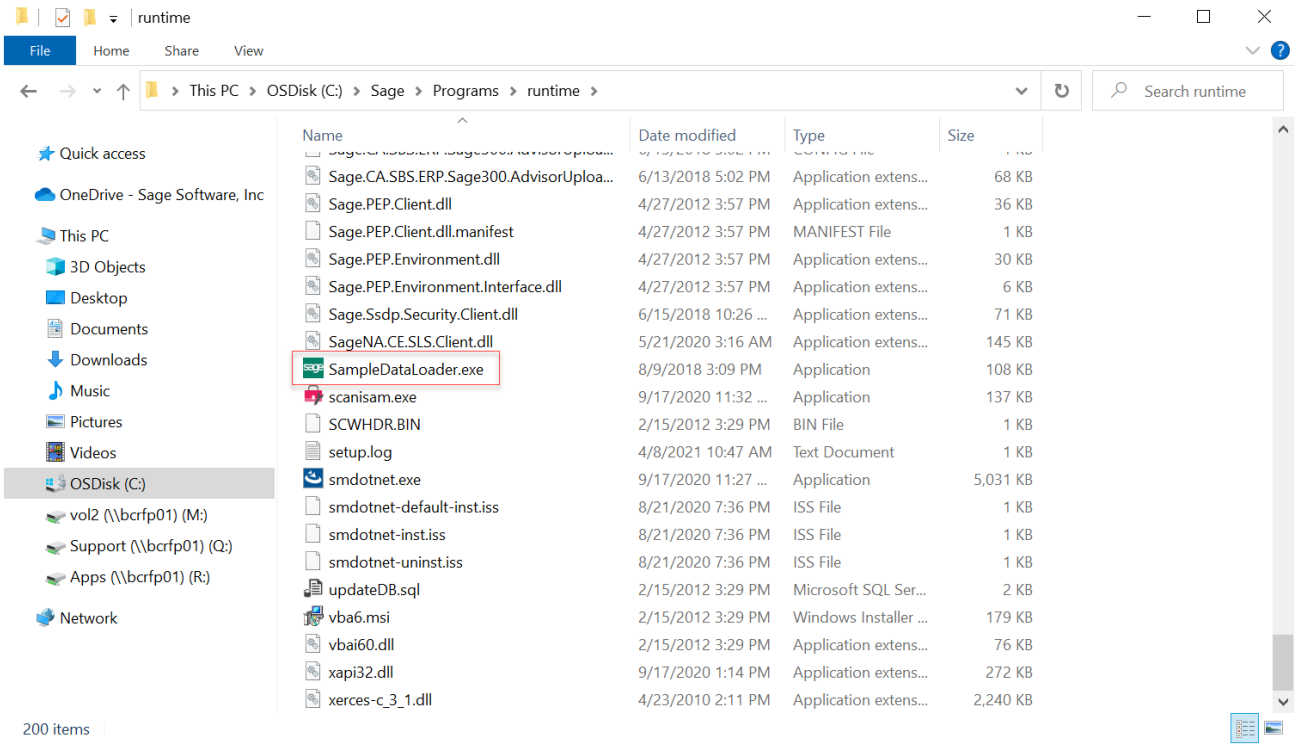
Sample Data Loader

1. Run **SampleDataLoader.exe**, which is in the following folder:

<Sage 300 programs folder>\runtime (for example, C:\Sage\Sage 300\runtime)

Right click on the **SampleDataLoader.exe** and select **Run as administrator** option.



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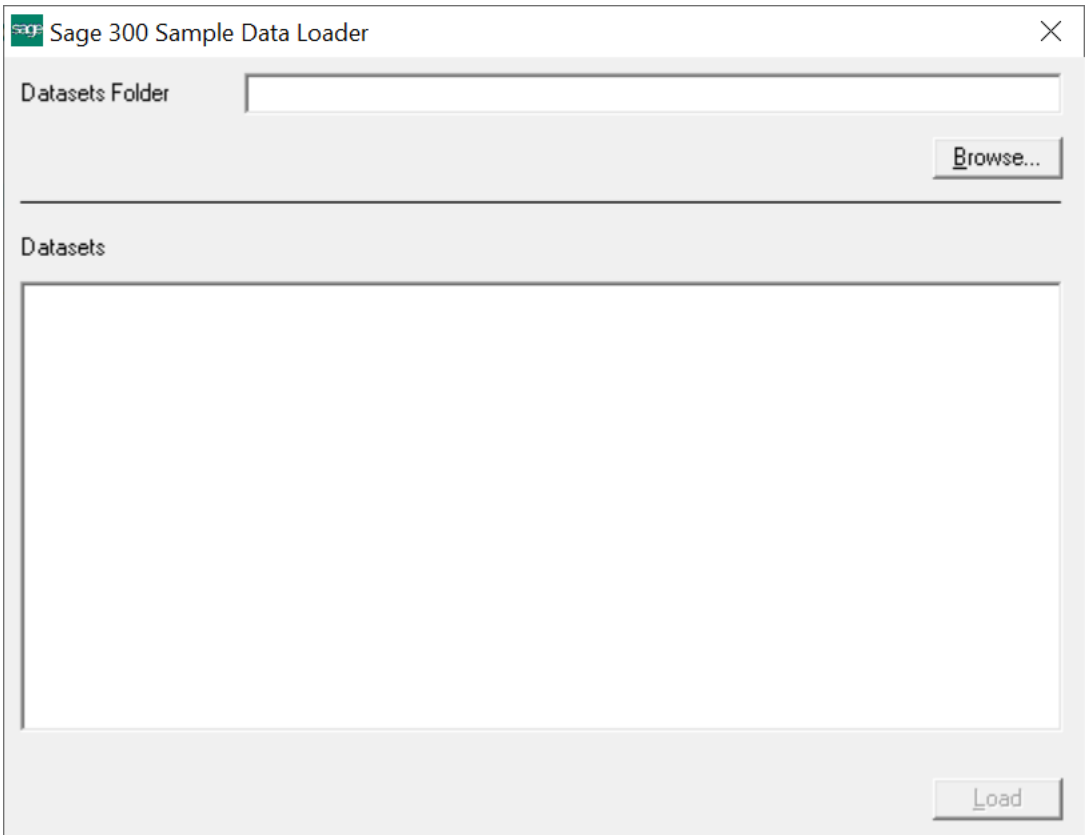
2. On the Sage 300 Data Loader screen, click **Browse**.



Navigate to the folder where you extracted the sample data and click to select the folder for the company data. (For example, to load sample data that is included in the installation, navigate to: <Sage 300 programs folder>\samdata)

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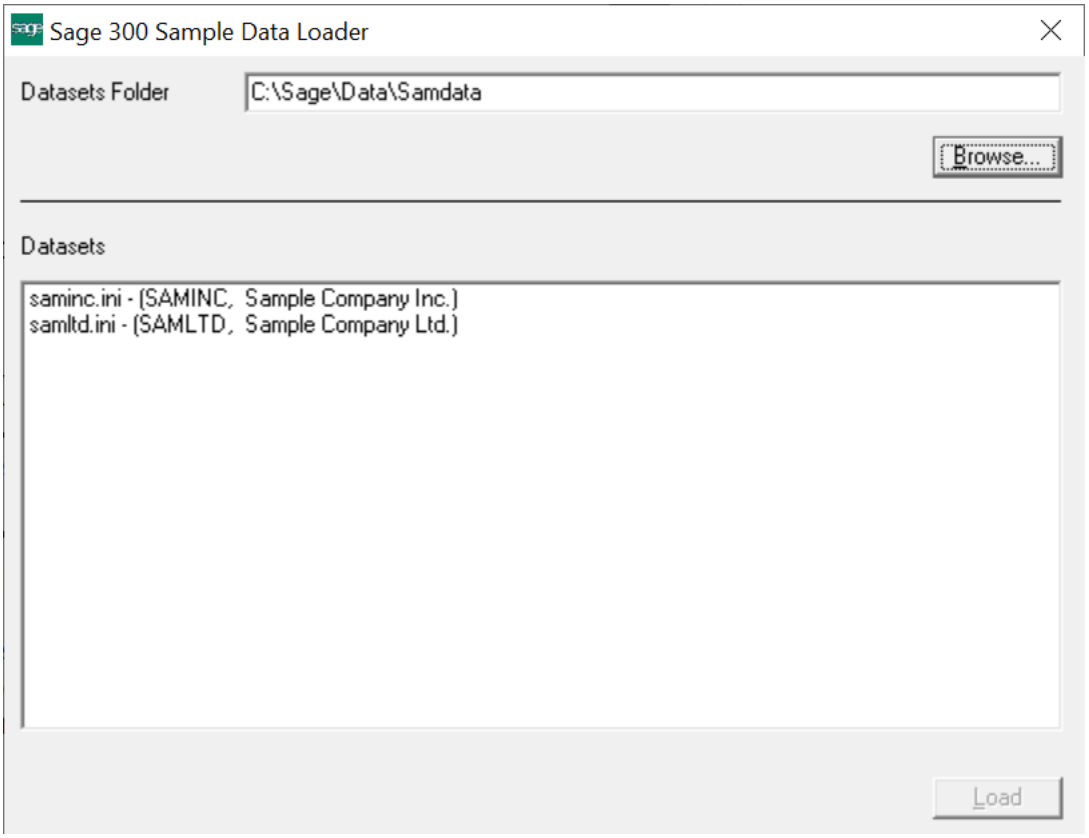
3. In the Datasets panel, select a company. The following sample companies are available:

• SAMINC (single-currency company)

• SAMLTD (multicurrency company)



4. Click **Load**. Company data and company system data are loaded into a SQL Server database.

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Check Your Knowledge

Answer the following questions about the material covered in this lesson.

Multiple Choice

Mark the correct answer(s) to the question below.

1. What is the name of the tool used to load sample data?

A. _____ Database Load

B. _____ Sample Data Loader

C. _____ Data Loader

D. _____ Data Restore

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Lesson 5: Creating a New Database

In this lesson you will learn how to create a new database in SQL Management Studio and in Database Setup without loading sample data.

Learning Objectives

By the end of this lesson, you will be able to:

- Create a database in SQL Management Studio
- Create a database in Database Setup

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About New Databases

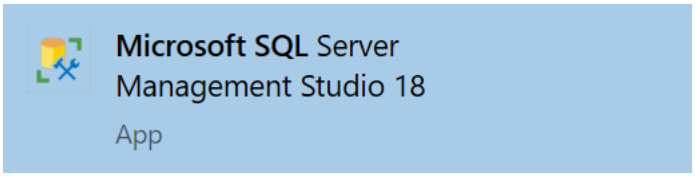
The instructions in this lesson describe the steps to manually create a new database using SQL Management Studio and the Sage 300 Database Setup. You should follow these steps if:

- You want to set up a database other than the provided sample databases.
- You want to create a new database manually.

The steps described in this lesson are optional. If you will only be using the sample companies provided with this edition of Sage 300, you do not need to create a new database. Instead, please follow the instructions in Lesson 4: Load Sample Data.

Creating a Database in SQL Management Studio

1. In windows, search and click on **Microsoft SQL Server Management Studio 18**.

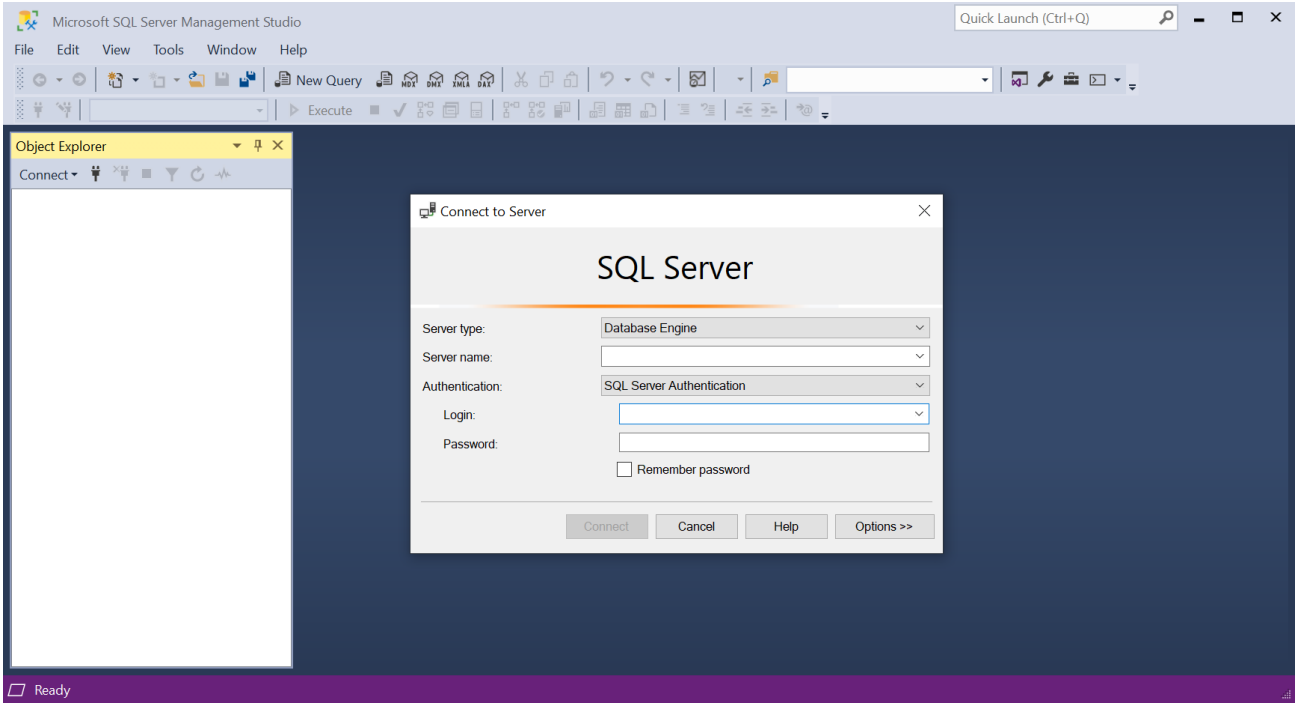


2. Connect to the SQL Server by entering in the credentials below:

• SQL Instance Name: <instance name>\SQLExpress

• SQL Username: sa

• SQL Password: Sage@300



The <instance name> is the name of the device. This can be found by searching for **This PC** in the windows search bar, right click on **This PC** and select properties. In this example the device name used is BCR707835. Therefore, the instance name will be BCR707835\SQLEXPRESS.

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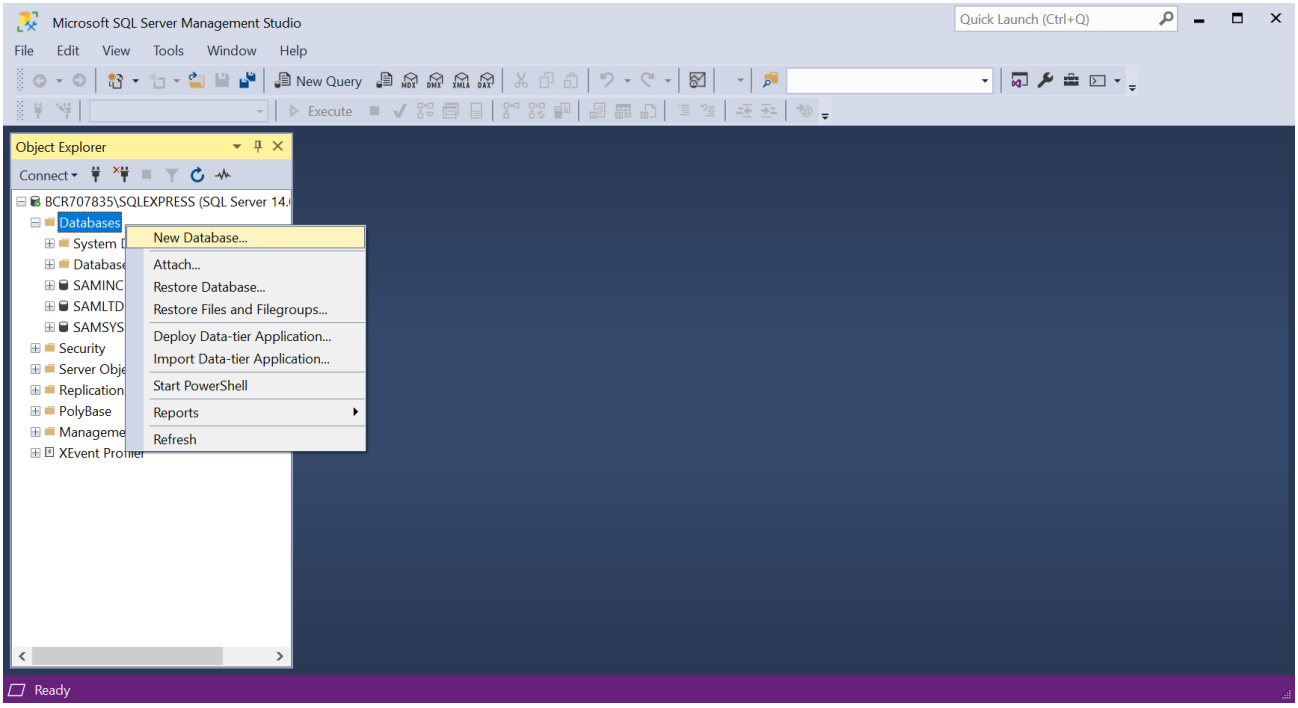
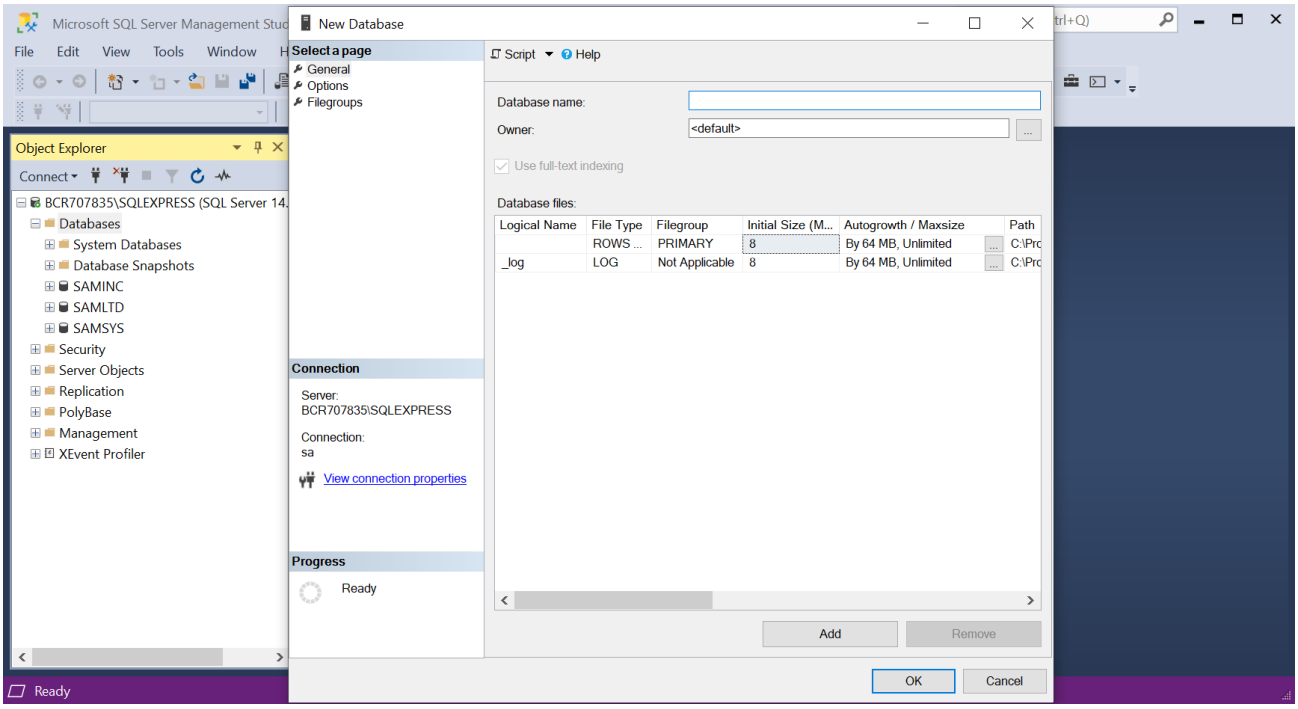
3. Once logged in, right click on **Databases** and select **New Database…**



4. In the Database Name field enter in a 6-character name for the database. For example, TESTDB. Click **OK**.



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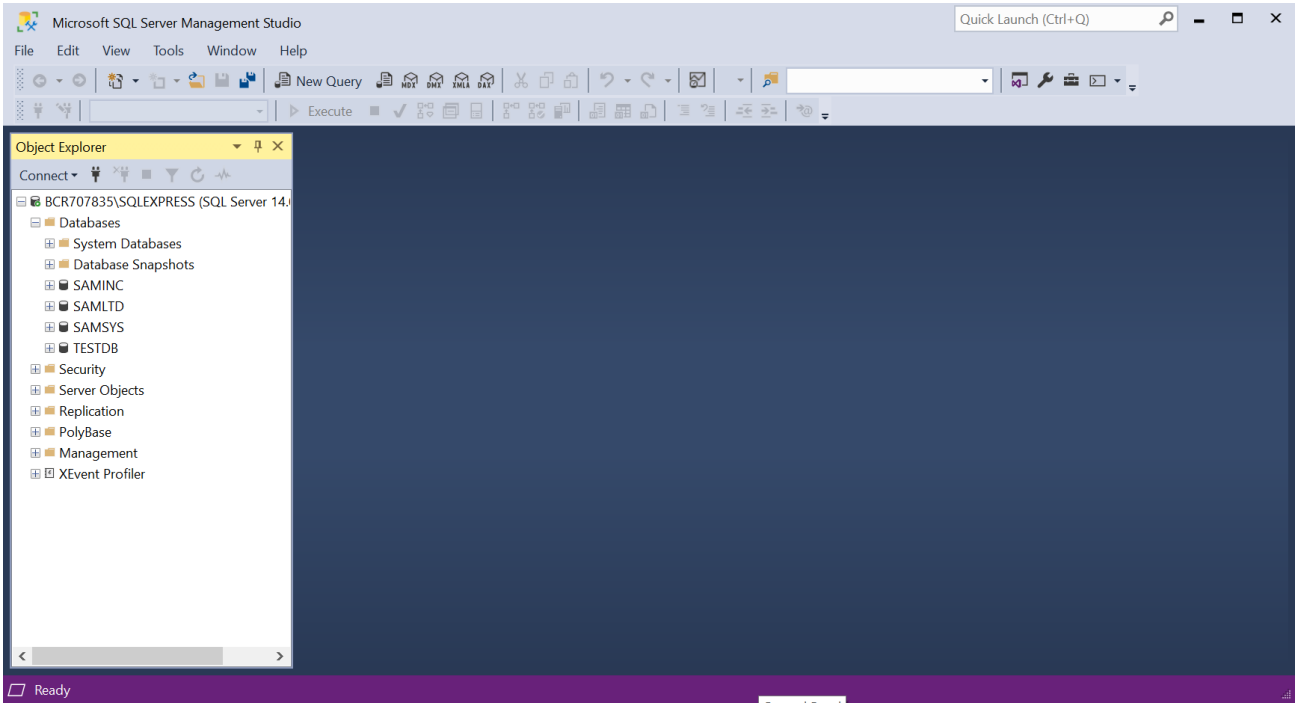
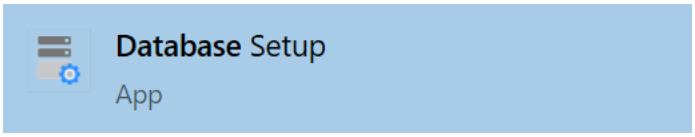
5. TESTDB will appear under the Databases folder when successfully created.



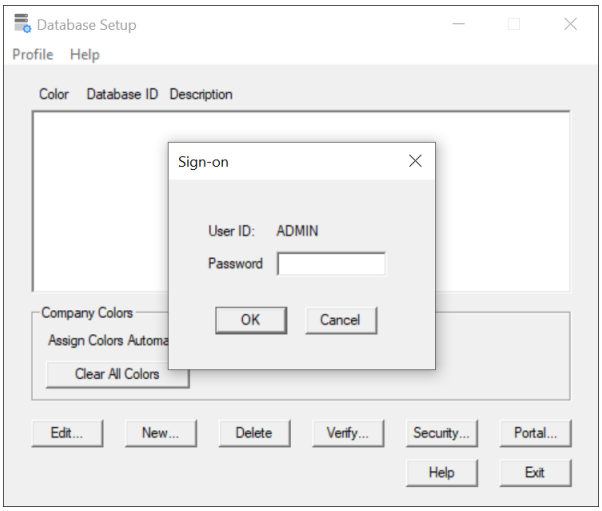
6. Repeat the same steps to create a new system database if this database will not be linked to SAMSYS in the next section.

Creating a Database in Database Setup

1. In windows, search for Database Setup and launch it.



2. Enter the default password for the ADMIN user which is admin. Click **OK**.



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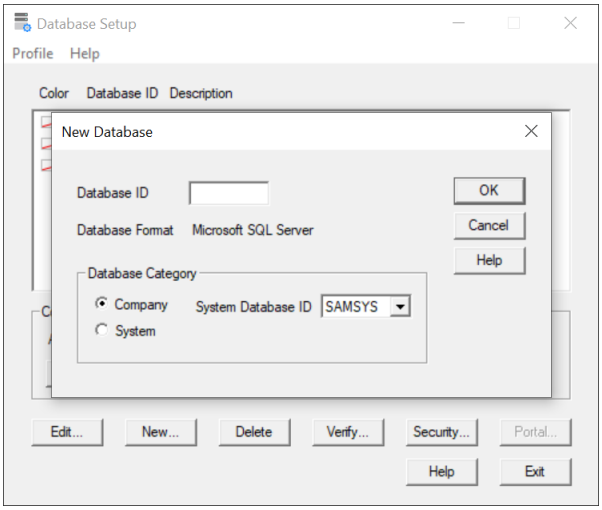
3. Enter the same Database Name created in SQL Management Studio from the previous section. This database can be linked to SAMSYS since it already exists, or else a new system database must be created. If a new system database is desired, it must be created in SQL Management studio before being set up in Database Setup.



4. Connect the databases from SQL Server to Database Setup using the credentials below:

• Description: Enter in a description that describes the use of the database

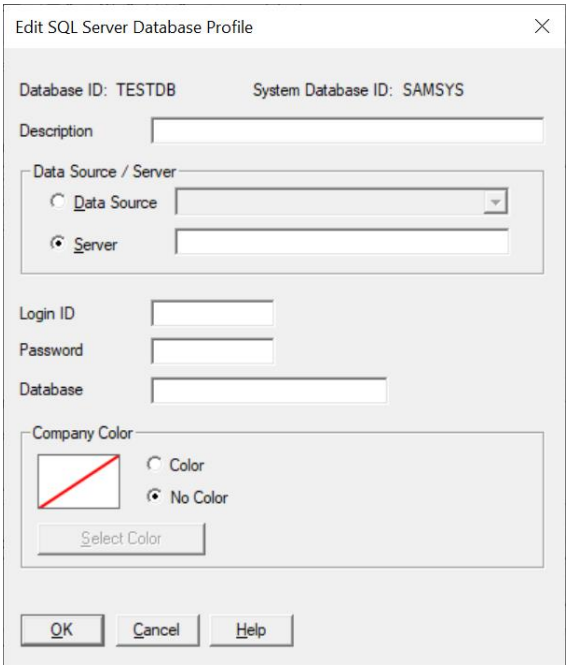
• Server: <instance name>\SQLExpress. This is the name of your device cover in the prior section.

• Login ID: sa

• Password: Sage@300

• Database: Enter the database name created in SQL Server. In this example, TESTDB.

Once all the required fields are filled, click **OK**.



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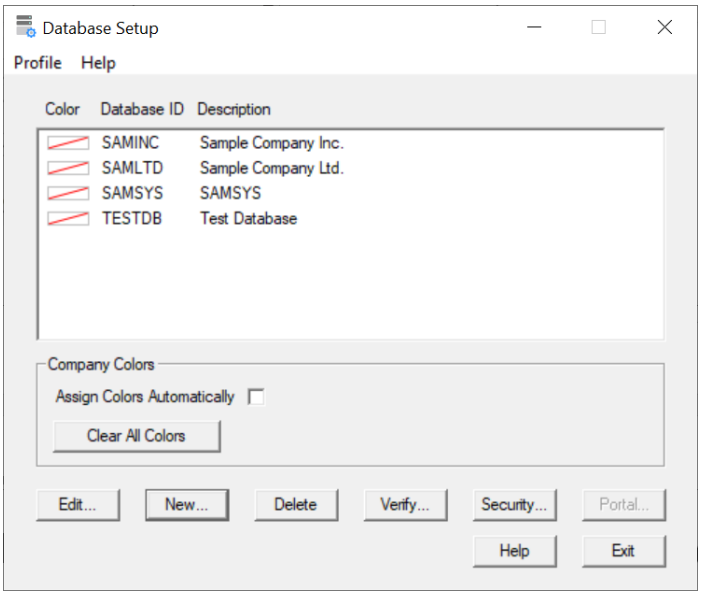
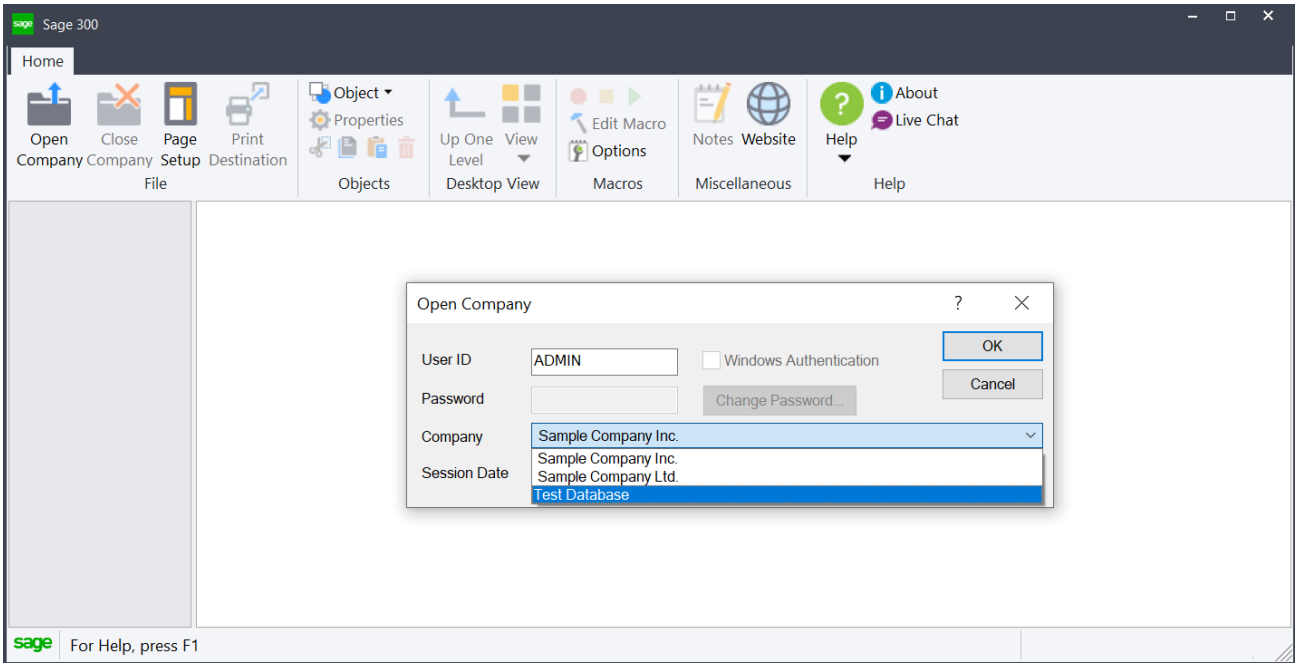
5. The newly created database will appear in the database setup screen.



6. Launch Sage 300. The newly created database will appear in the dropdown list.



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Check Your Knowledge

Answer the following questions about the material covered in this lesson.

True or False

Enter ‘T’ for True or ‘F’ for False for each of the affirmations below.

1. _____ A database must be created in SQL Management Studio before creating it in Database Setup.
2. _____ When logging in to SQL Management Studio the username is Administrator
3. _____ The default password for the ADMIN user is admin.

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Installing Sage 300 Limited - Answer Keys

This section includes the answers for all the Check Your Knowledge sections in this guide.

Lesson 1 – Student Registration

1. D

Lesson 2 – Install SQL Server 2017 Express

1. A

Lesson 3 – Install Sage 300 Limited

1. C

Lesson 4 – Load Same Data

1. B

Lesson 5 – Creating a New Database

1. True

2. False

3. True

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