

Peresoft Web UIs

recXpress®

cash.book

eftXpress®

Web UIs Install Instructions

Products: Peresoft Web UIs

Cashbook Web Screens for Sage 300cloud Compatibility

- Compatible with Sage 300cloud 2021, 2022 and 2023
- Updates will be released for the current version of Sage 300cloud only so keep the client up to date with the current version and latest Pus
- Peresoft cloud products do not replace Peresoft on-premise products. You need certain UIs as well as the current views
- Make sure your web browser is up to date to ensure your browser versions are compatible with Sage 300cloud

Software Licensing Requirements

- The Web UIs have their own license
- Only current versions of the Web Screens will be supported
- Software Assurance must always be current
- The Peresoft licenses will expire so client must keep Software Assurance current

Files to Install for Version's 2021/2022/2023

Install the following on the client's server
logged in as Administrator

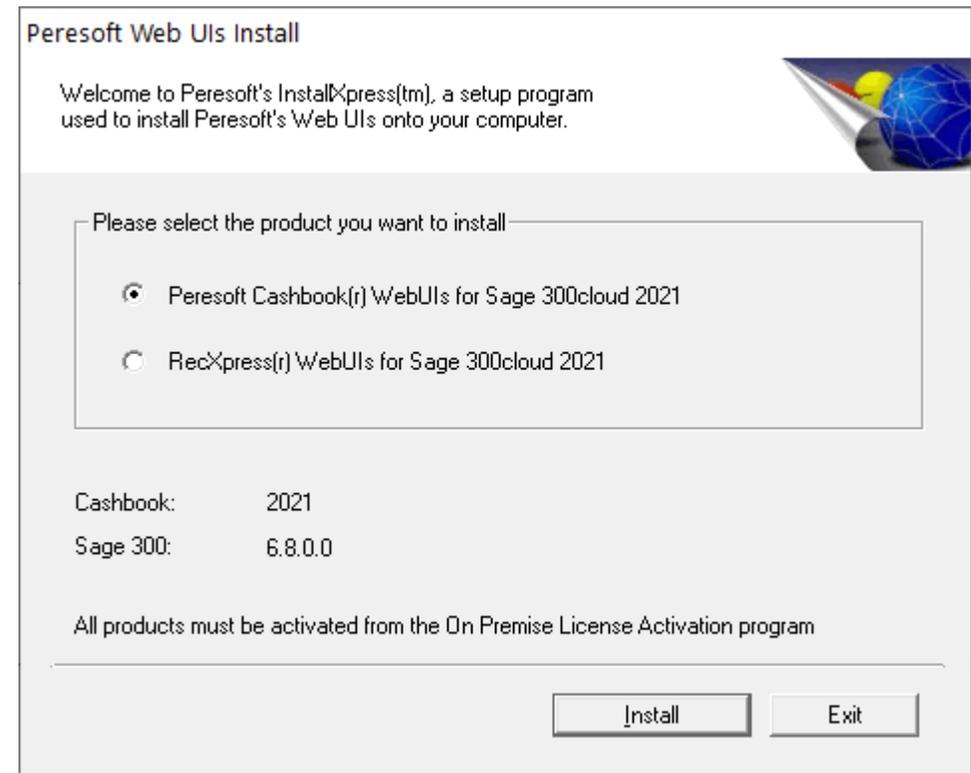
2021		2022		2023	
18000.exe	Cashbook	19000.exe	Cashbook	20000.exe	Cashbook
18700.exe	Web UIs	19700.exe	Web UIs	20700.exe	Web UIs

Installing Cashbook for Sage 300cloud 2021

18700 - Web UI Install Screen

Install the following after installing Sage 2021:

- Cashbook On-premise 2021 - 18000.exe
- Run the Peresoft Web UI install - 18700.exe
- Install Cashbook WebUIs for Sage 300cloud
- Install RecXpress Web UIs if necessary
- EFTXpress is integrated into Cashbook installation

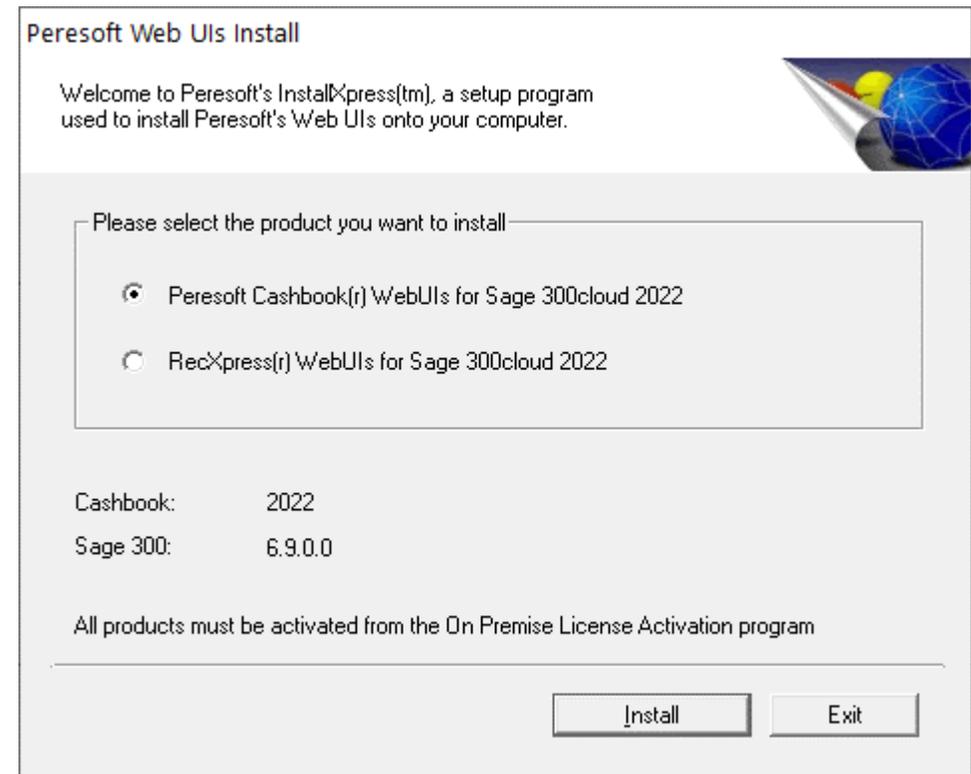


Installing Cashbook for Sage 300cloud 2022

19700 - Web UI Install Screen

Install the following after installing Sage 2022:

- Cashbook On-premise 2022 - 19000.exe
- Run the Peresoft Web UI install - 19700.exe
- Install Cashbook WebUIs for Sage 300cloud
- Install RecXpress Web UIs if necessary
- EFTXpress is integrated into Cashbook installation

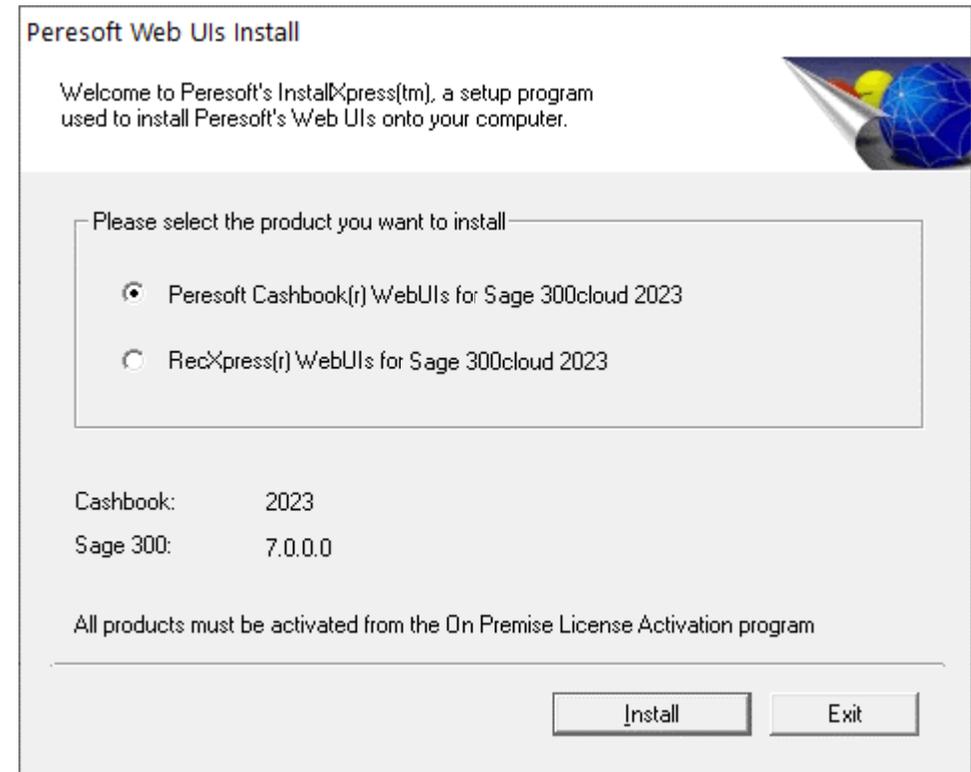


Installing Cashbook for Sage 300cloud 2023

Install the following after installing Sage 2023:

- Cashbook On-premise 2023 - 20000.exe
- Run the Peresoft Web UI install - 20700.exe
- Install Cashbook WebUIs for Sage 300cloud
- Install RecXpress Web UIs if necessary
- EFTXpress is integrated into Cashbook installation

20700 - Web UI Install Screen

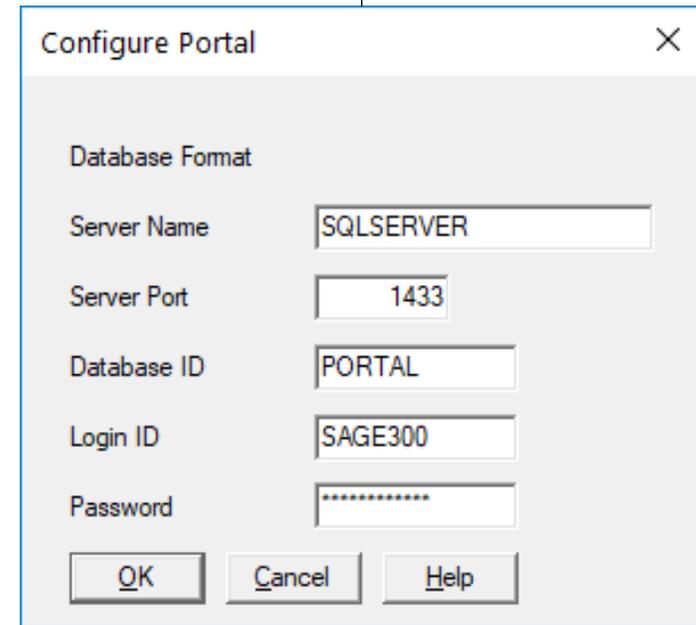
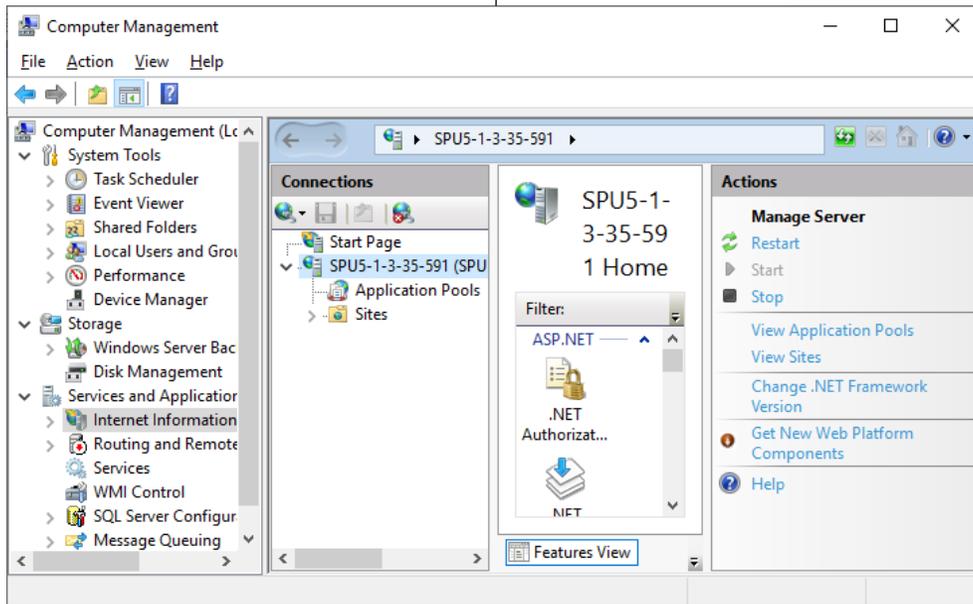


Completing Installation

Once the installation is completed you must:

A) Restart Microsoft Internet Information Services (IIS)

B) Re-Run the Portal database configuration from Sage 300 Database Setup



Make Sure the Sage.CNA.WindowsService has been started

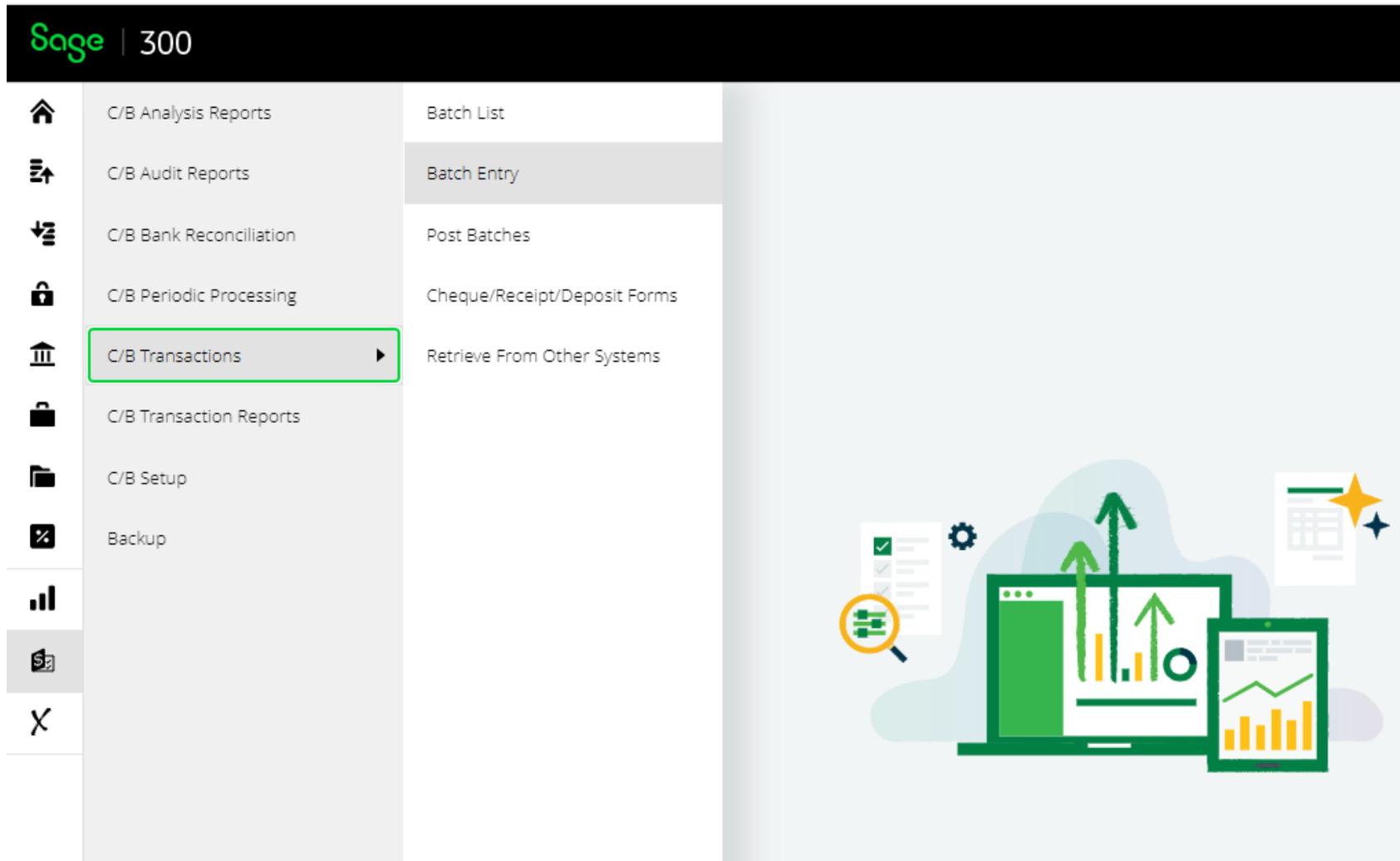
The screenshot shows the Windows Services console with the 'Sage.CNA.WindowsService' highlighted. The service is running and has an automatic startup type. A 'Configure Portal' dialog box is open in the foreground, showing the following configuration:

Field	Value
Database Format	
Server Name	SQLSERVER
Server Port	1433
Database ID	PORTAL
Login ID	SAGE300
Password	*****

Buttons: OK, Cancel, Help

The Sage.CNA.WindowsService is used to run all the Sage View processing functions across the web

Peresoft's products will now display in your Sage 300cloud Web menu



Debugging and Problem Solving: Use Inspect to Identify Issues

If the web screen stops working, right click, select inspect, select the Console tab and see if you can pinpoint the error.

The image shows a Sage 300 web application interface for 'C/B Bank Reconciliation'. The interface includes a header with 'Sage | 300', a session date of 'Nov 30, 2030', and user information 'Administrator'. The main content area displays the 'C/B Bank Reconciliation' screen for 'Seattle Tacoma Bank'. It features a 'Bank Totals' summary table, a table of transactions with columns for 'M...', 'Ref/Chq Num...', 'Date', 'Description', 'Amount', 'S', 'Reconciled Amount', 'Variance', 'Status Description', and 'Cor'. Below the table are navigation controls and radio buttons for 'Cashbook', 'Bank Statement', and 'History'. The bottom of the screen shows 'Print', 'Close Bank', and 'Close' buttons.

On the right side, the browser's developer console is open, showing several error messages:

- [Deprecation] Synchronous XMLHttpRequest on the main thread is deprecated because of its detrimental effects to the end user's experience. For more help, check <https://xhr.spec.whatwg.org/>.
- Error parsing value: to JSON
- Connection Established
- Error parsing value: True to JSON
- SaveUserPreferences: null
- Error parsing value: True to JSON
- SaveUserPreferences: null
- JQMIGRATE: Migrate is installed, version 3.1.0
- JQMIGRATE: Migrate plugin loaded multiple times
- JQMIGRATE: Migrate is installed, version 3.3.2
- Finished loading grid
- [DOM] Found 10 elements with non-unique id #btnDetailsPopUp: (More [ReconcileCashbook:1](#) info: <https://goo.gl/9p2vKq>) null null null null null null null null null null
- Finished loading grid
- [DOM] Found 10 elements with non-unique id #btnDetailsPopUp: (More [ReconcileCashbook:1](#) info: <https://goo.gl/9p2vKq>)

The console also displays a large block of HTML code for an input field, which is a result of the 'Inspect' tool being used on the interface.

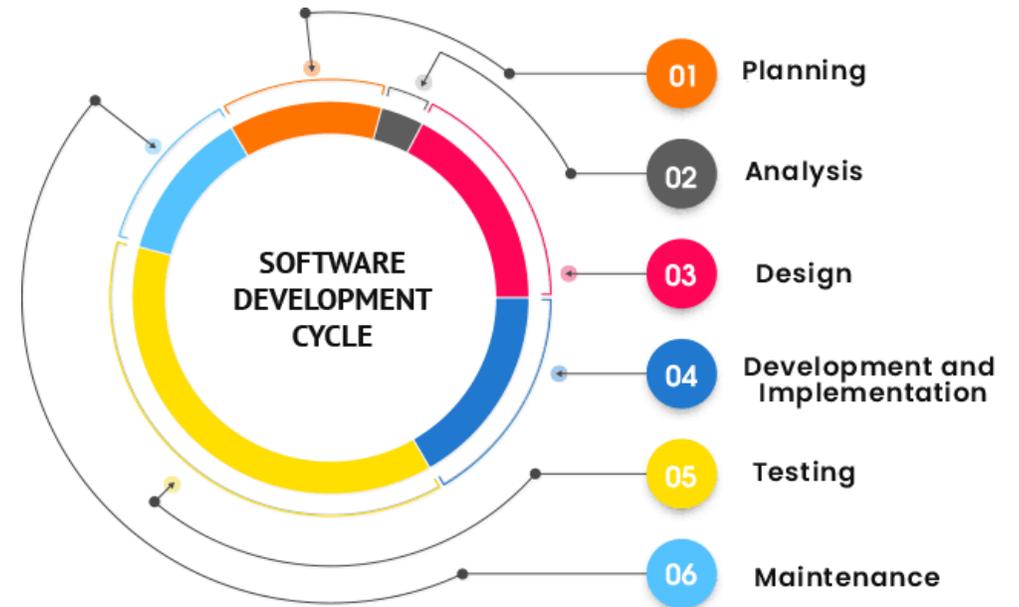
Debugging and Problem Solving: Log Files

You will also find a log file under:

- a) [program dir]\online\web\logs
- b) [program dir]\online\worker\logs

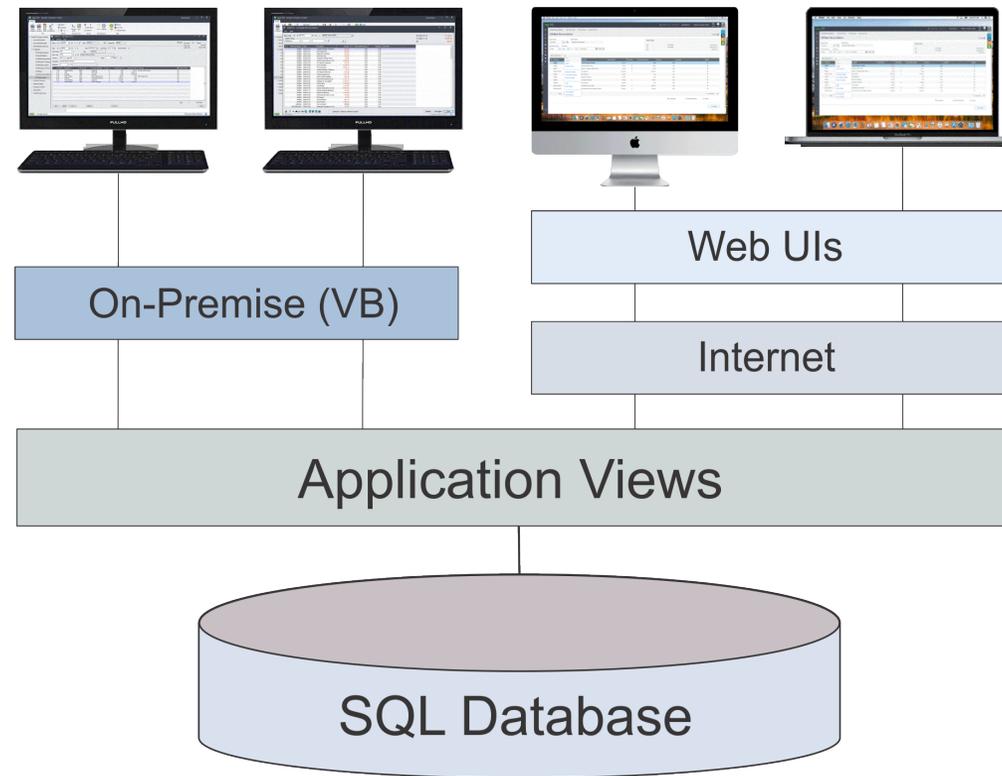
Sage SDK Development

- All Peresoft's products have been developed using Java Script, C# and Razor Views (which are compiled).
- Features available to the Sage 300 products are also available to Peresoft products. E.g. Screen Customization, Web Services, etc.
- View architecture, developed and debugged through the years using C, is used throughout Peresoft's products.



Database Updates Via the Views

Data Integrity is secured because data updates are always done via views



Advantages Using Views

- All database updates are processed via the views
- Views were developed in C, a language that never ages
- Over the years the views have been debugged
- Views don't change except when new fields are added
- Overhead on the server is minimal
- Processes, e.g. posting, are very efficient

Advantages Using Web UI's

- Easy to install
- Only one installation for the client
- No workstation setup
- Use a browser from any computer, laptop, tablet, smartphone, etc.
- Perfect fit for the future
- True 3 tier architecture

Tips and Advice For Entering Data, etc.

- Do not create batches that are too large.
- When entering many detail lines, save regularly. For example, if you are entering 20 detail lines, save after 5, 10, 15, 20. If the browser stops working or the internet disconnects you could lose anything that is not saved. This also applies to allocations and adjustments.
- Make sure the user always closes the UI properly and does not just close the browser.
- Get the user to log out correctly from the company.
- If the user gets up from the computer tell them to logout. If they don't the program will timeout and log them out automatically. All work will also be lost.

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