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What's New in Version 2023

Sage 100 Desktop Changes

The following changes were made to the Sage 100 Desktop.

Information Center Page

A new Sage 100 Information Center page has been added, providing dynamic content and announcements for you.

Recent Tab Added to the Ribbon

The Recent tab has been added to the ribbon, showing tasks that have been accessed from the File menu, Home tab, Web Content tab, and Modules tab. On the View tab, you can set how many recent items to show. You can also hide the Recent tab by right-clicking the ribbon and clearing Show Recent in the Ribbon.

Expanded Tooltips

Expanded tooltips now show where tasks are located. For example, hovering over Company Maintenance displays the tooltip **Located in the Library Master Main menu**.

Active Tab on the Ribbon Persists

The last tab accessed on the ribbon persists after exiting Sage 100. For example, if the Favorites tab was the last tab used when you exited Sage 100, it will be the active tab the next time you log in.

Global Changes

The following changes are carried throughout multiple modules.

Installation Simplification

In version 2023, Sage 100 has been consolidated into a single product with three installation approaches. The option to install Sage 100 Standard, Sage 100 Advanced, and Sage 100 Premium has been removed. Instead, during installation you will have the option to select the architecture to use (**Stand-Alone** or **LAN or Client/Server**). If you select the Client/Server architecture, you will be prompted to select the database to use (**ProvideX** or **Microsoft SQL Server**).

Also, the following installation changes have been made:

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- On the Integration Engine Service screen, a Skip button has been added. If you're not integrating with Sage CRM, you can click Skip to bypass configuring the Integration Engine.
- On the Productivity Applications screen, the Configure Integration Engine option has been added.

Select Serial Numbers by Range

The Select Serial Numbers by Range button has been added in Lot/Serial Number Distribution. You can select serial numbers using a range instead of scrolling through a list to find the starting and ending serial numbers. This enhancement is carried throughout the following modules:

- Bill of Materials
- Inventory Management
- Purchase Order
- Production Management
- Return Merchandise Authorization
- Sales Order

We're listening! This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the Sage 100 ideas site.

Default Years to Retain History

In module options tasks in which you can specify how many years to save history, the default setting is now nine years. The minimum required number of years to retain history has not changed, and this update will not affect your existing settings.

Activity Log Updates

When the Accounts Payable Remove Inactive Vendors utility and the Accounts Receivable Remove Inactive Customers utility are run, the Activity Log is updated with a list of inactive vendors and customers removed.

Image Viewer

The Image Viewer in Item Maintenance and Miscellaneous Item Maintenance has been updated so that you can delete an image when you have the appropriate security set up. The delete feature is available based on the new security option in Role Maintenance, Allow User to Delete Image Files with the Image Viewer.

iShip Replacement

The iShip tracking tool has been replaced. In data entry tasks, when you click the Tracking button, the tracking ID will now be used to determine which carrier the package belongs to and you will be redirected to the appropriate site. The carriers handled automatically are USPS, UPS, FedEx, DHL, and OnTrac. If the package ID does not belong to one of these carriers, you will be redirected to a Google search with the package ID.

SAP Crystal Reports 2020

SAP Crystal Reports has been updated to version 2020. Crystal runtime components (SP30) are the same version as in Sage 300, Sage Fixed Assets, and Sage HRMS.

Accounts Payable

The following changes were made in the Accounts Payable module.

Masked 1099 Vendor Taxpayer ID/Social Security Number

The 1099 Vendor Taxpayer ID/Social Security Number is now masked in data entry tasks and will also print masked on the Vendor Listing, Vendor Listing with Balances, and Vendor Mailing Labels. Only users with the appropriate security setup can view this sensitive information and access the option Print Unmasked Taxpayer ID/SSN check box.

The check box is available based on the new security option in Role Maintenance, Allow Viewing, Printing, and Editing of Highly Sensitive 1099 Information.

Masked ACH Bank Account and Routing Numbers

The vendor electronic payment bank account and routing numbers are now masked in data entry tasks and will also print masked on the Vendor Listing. The routing transit numbers are also masked in ACH Maintenance. Only users with the appropriate security setup can view this sensitive information and access the option Print Unmasked ACH Information check box in Vendor Listing.

The check box is available based on the new security option in Role Maintenance, Allow Viewing, Printing, and Editing of Highly Sensitive ACH Information.

Improvements in Invoice Payment Selection

The Include check box has been added in the Select Invoices for Payment window, enabling you to quickly select each invoice for payment.

Vendor Maintenance

On the Additional tab in Vendor Maintenance, the DBA Name field has been renamed the 1099 Name field.

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Grid Definition Maintenance

When defining grid columns in Grid Definition Maintenance, you can now exclude columns from being exported to Excel by entering EXCEL=No at the Tag field.

Inventory Management

The following changes were made in the Inventory Management module.

Option to Hide Inactive Warehouses

The Display Quantities for Inactive Warehouses check box has been added on the Additional tab in Inventory Management Options to allow you to hide inactive warehouses.

A Show/Hide Inactive Warehouses button has been added in the following locations:

- Main tab on Item Maintenance and Item Inquiry
- Quantity tab on Item Maintenance and Item Inquiry
- Reorder Maintenance
- Item Quantity Inquiry

Option to Show/Hide Zero Quantities for Lot/Serial Items

The Display Zero Quantities for Lot/Serial Items in Cost Detail check box has been added on the Additional tab in Inventory Management Options. You can select this check box to initially display lot/serial items with zero quantities on the Cost Detail tab in Item Maintenance and Item Inquiry.

A Show/Hide Zero Quantity Lot/Serial Rows button has also been added on the Cost Detail tab in Item Maintenance and Item Inquiry.

Remove Inactive Items Utility

The Remove Inactive Items task has been added to the Inventory Management Utilities menu. After running the utility, the Activity log is updated with a list of inactive items removed.

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Inventory Requirements Planning

The following changes were made in the Inventory Requirements Planning module.

Inventory Requirements Planning Options

The following options have been added:

- Pull In Work Ticket check box
- Push Out Work Ticket check box
- Round Integer Unit of Measure check box
- Include Phantom Bills check box
- Base Effective Date on Release Date of Demand check box
- Calculate Build Time for Make Items Using field

Inventory Requirements Planning

The following fields have been added, providing more options for the IRP generation process:

- Effective Date field
- Include Sales Quotes check box
- Explode Make Action field
- Create Work Ticket with Materials From field
- Default Lead Time (Days) field
- Default Build Time (Days) field
- Advanced Arrival Allowance (Days) field

If the Inventory Requirements Planning module is not integrated with Production Management or Purchase Order, you can now click Production or Purchase to view a report of inventory demand.

Expanded Summary and Detail Information

In Items to Produce and Items to Purchase, you now have the option to view summary information for items with pending actions.

Item Detail now displays the recommended action, action date, and required date to meet demand for each detail record.

Schedule IRP Generation with Task Scheduler

You can now schedule the IRP generation process with Library Master Task Scheduler. This provides you with the flexibility to run the generation after business hours or overnight.

Inventory Requirements Planning Inquiry

Inventory Requirements Planning Inquiry has been added to the Inquiries menu. Use this task to view purchase or production information for an item based on the last completed IRP generation process.

Reports Menu

A Reports menu has been added, along with the following reports: Action By Vendor Report, Inventory Requirements Planning Report, Projected Demands Report, and Work Ticket and Sales Order Demand.

Action By Vendor Report

The Action By Vendor Report includes the ability to select by warehouse code and then print the warehouse code on the report. The standard unit of measure also prints on the report.

Projected Demands Report

The following changes have been made:

- A fiscal/calendar year option has been added, enabling you to print the report for a selected year.
- When the Consolidate Customers check box is selected if item projected demands are included in the consolidation, the Qty Sold column on the report displays the item's total quantity sold. If item projected demands are not included in the consolidation, the Qty Sold column displays the sum of the consolidated customer's quantity sold.

Library Master

The following changes were made in the Library Master module.

Option to Suppress Expired Messages

The Suppress Expired Messages check box has been added in User Maintenance, enabling you to suppress displaying expired license messages by user.

Retain Last Path in Data File Display and Maintenance

When you click the Folder button in Data File Display and Maintenance, the Select File window now shows the folder location of the last file viewed.

We’re listening! This idea was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Paperless Office

The following change was made in the Paperless Office module.

Updated Printer Driver

The Amyuni PDF Converter, the virtual printer driver used to create PDF documents, has been updated to version 6.5.1.7.

Production Management

The following changes were made in the Production Management module.

Enhanced Scheduling

Enhanced scheduling features have been added throughout the Production Management module to provide you with more flexibility and functionality.

Your Sage 100 business partners at work! This idea was a suggestion from 90 Minds, Inc. where "More Minds Are Better Than One."

Production Management Options Schedule tab

In Production Management Options, a Schedule tab has been added with the following new options:

- Select the Enable Enhanced Scheduling check box to use the forward or backward scheduling method to schedule work tickets. Enhanced scheduling is the functionality that was in the Work Order module.
- If you prefer to use basic scheduling, clear the Enable Enhanced Scheduling check box. Basic scheduling is the functionality that was in previous releases of Production Management.
- The Maximum Number of Months to Schedule field has been added.
- You can define default work center closures that will be used for all work centers.

Activity Code Maintenance

The following enhanced scheduling fields have been added in Activity Code Maintenance:

- Calculation Method
- Ignore Queue Time

Work Ticket Template Maintenance

The following enhanced scheduling fields have been added in Work Ticket Template Maintenance:

- Calculation Method
- Hours Per Activity / Activities per Hour / Number of Hours
- Overlap Percent
- Ignore Queue Time

Work Center Maintenance

The following changes have been made in Work Center Maintenance:

- Enhanced scheduling fields have been added: Queue Time (Hours), Efficiency Percent, Number of Workers or Machines, and Minimum Scheduling Time Period (Minutes)
- You can set up the number of hours a work center is available for operation each day of the week at the Available Hours fields.
- Closures for specific work centers can be set up.
- Click Copy From to copy information from an existing work center when creating a new one.
- Click Apply to copy available hours and closures from an existing work center to one or more other work centers.
- The Memo button is available to view, create, and maintain memos.

Work Ticket Entry

In Work Ticket Entry, the following changes have been made for enhanced scheduling:

- On the Schedule tab, the Schedule button has been added to access the new Schedule Work Ticket window.
- In the Schedule Work Ticket window, you can select the forward or backward scheduling method to determine when each step of a work ticket is started and how long each step takes to complete.
    - Use forward scheduling to enter the start date of a work ticket, and the scheduling process will calculate the due date for the work ticket.
    - Use backward scheduling to enter the due date for a work ticket, and the scheduling process will calculate when the work ticket will be released to the work center, in order for the work ticket to be completed on time.
- On the Schedule tab, the Manually Schedule check box has been added to give you the option to manually enter the production start date and production due date on the Schedule tab and the Steps tab.

- On the Steps tab, the following fields have been added to the secondary grid: Ignore Q Time, Overlap Percent, Prod Queue Date, Sched Method, Scheduling Hrs, Scaling Method, Scaling Factor, and Extended Time.

Work Ticket History Inquiry

You can now view detailed step information on the Work Ticket History Inquiry Schedule tab by selecting a step in the list box and clicking the Additional Information button.

Work Center Capacity Inquiry

Work Center Capacity Inquiry has been added to the Inquiries menu. Use this task to review commitments against work centers in three formats: daily, weekly, and detail.

Scheduled Capacity Report

Scheduled Capacity Report has been added to the Reports menu. Use this report to print commitments against work centers in three formats: daily, weekly, and detail.

Material Issue Workflow Improvements in Work Ticket Transaction Entry

In Work Ticket Transaction Entry when creating a materials transaction, you can now import available material lines with remaining quantity to issue in bulk to the Lines tab. This enhancement speeds data entry.

You have the option to select all available material lines, or you can use the new Material Selection window to select specific material lines to issue. The Material Selection button has been added on the Work Ticket Transaction Entry Lines tab to open the Material Selection window.

Lot/Serial History

A Lot/Serial History button has been added in the following locations:

- Materials tab on Work Ticket History Inquiry
- Inquiry tab on Work Ticket History Inquiry for the Materials and Completions views
- Inquiry tab on Work Ticket Entry for the Materials and Completions views

Selections for Purging Work Ticket History

In Purge Work Ticket History, selections have been added to enable you to purge by work ticket number, release date, and close date.

Work Ticket Template Maintenance

You can now add a scrap percentage for each item on the Materials tab in Work Ticket Template Maintenance.

Labor Entry

In Labor Entry if you're capturing punch in/out time for an employee and the Payroll module is integrated with Production Management, you can now select a department worked in at the Dept No. field that is different than the employee's assigned department in Payroll Employee Maintenance.

When you update the Payroll Check Register, the department worked in and its general ledger accounts will be used instead of the employee's assigned department.

Add Activity Codes and Work Centers On the Fly

You can add on-the-fly activity codes and work centers in Work Ticket Class Maintenance, Work Ticket Template Maintenance, and Work Ticket Entry with the appropriate security setup in Library Master Role Maintenance.

Option to Relieve WIP Based on Percent Complete

The Relieve WIP Based on Percent Complete check box has been added on the Work Ticket Entry Header tab and the Work Ticket Class Maintenance Main tab. Select this check box to use the prorated cost for WIP when entering a partial completion in Work Ticket Transaction Entry.

Explode Bill Subassemblies

In Work Ticket Entry, the Explode Subassemblies check box has been replaced by the Explode Bill Subassemblies field. When the Bill of Materials module is integrated with Production Management and enhanced scheduling is used, selecting Yes at the Explode Bill Subassemblies field now creates work ticket steps for each subassembly on a multilevel bill. This functionality was in the Work Order module and has now been added to Production Management.

Explode Template Subassemblies

In Work Ticket Entry, the Explode Template Subassemblies field has been added, providing the ability to explode subassemblies defined on a work ticket template when enhanced scheduling is used.

Recalculate Material Budgets

On the Materials tab in Work Ticket Entry, the Recalculate Material Budgets button has been added, enabling you to recalculate budgets for the step assigned to the selected material line. All the material detail lines assigned to the same step will be recalculated. Click the arrow next to the button, and then select Recalculate Material Budgets All Steps to recalculate budgets for all material lines and steps in the grid.

Work Ticket Entry Copy Feature

In the Work Ticket Entry Copy From window, the Production Start Date field has been added to simplify the process of copying a manually scheduled work ticket.

During the copy process, the system will calculate the number of days between the start date entered here and the source work ticket start date. The difference between the dates will be used to automatically adjust all of the scheduling dates in the source work ticket steps as they are copied.

Create Work Ticket with Materials From Option

A new option has been added in Production Management Options, enabling you to create a work ticket using the materials from the bill, work ticket template, both the bill and template, or you can select to be prompted with a message in Work Ticket Entry asking which materials to use.

Features No Longer Subscription Only

The following features were initially available only if you purchased Sage 100 through a subscription plan. They are now available to all users, regardless of whether Sage 100 was purchased as a subscription or perpetual license.

- **Journal and Register Viewer**: Access to the Paperless Office Journal and Register Viewer is available from various locations.
- **Task Scheduler**: You can email reports printed from a Task Scheduler job.
- **Data File Display and Maintenance Enhancements**: You can now select a subset of fields from the table to be displayed. When selected, you can define filters and apply them to one or more of the fields to limit the rows displayed in the Key Scan screen. The status text on the Key Scan screen will indicate when a filter is active.
- **Map Service**: An option has been added on the Preferences tab in User Maintenance allowing you to select which map service to use when clicking the Map button in Sage 100 tasks. Use Google Maps, Bing Maps, or MapQuest

What's New in Version 2022
(Excerpted from Sage 2021 Upgrade Guide)

What's New in Version 2022.3

Update 3 for Sage 100 2022 includes the following enhancements.

Accounts Payable

The following changes were made in the Accounts Payable module.

Form 1099 Tax Reporting Version

Form 1099 Tax Reporting has been updated to version 2.98.

DBA Name for 1099 Forms

There has been a functionality change of where the 1099 DBA Name field prints on the 1099 Form.

If there is a name entered in the DBA Name field on the Additional tab in Vendor Maintenance, it will now print on Line 1 of the Recipient Name box of the 1099 Form and the Vendor Name will print on Line 2 of the Recipient Name box of the 1099 Form.

Updates for 1099 Form Tax Reporting

The following options have been added to support Form 1099 printing for tax year 2022:

- For the 1099-DIV Form:
  - Box 11 is now FATCA filing requirement check box.
  - Subsequently, old box numbers 11 through 15 have been renumbered to new box numbers 12 through 16, respectively. The new boxes are as follows:
    - Box 12 - Exempt-interest dividends
    - Box 13 - Specified private activity bond interest dividends
    - Box 14 - State
    - Box 15 - State Identification No.
    - Box 16 - State Tax Withheld
- For the 1099-MISC Form:

- Box 13 is now FATCA filing requirement check box
- Subsequently, old box numbers 13 through 17 have been renumbered to new box numbers 14 through 18, respectively. The new boxes are as follows:
  - Box 14 - Excess golden parachute payments
  - Box 15 - Nonqualified deferred compensation
  - Box 16 - State tax withheld
  - Box 17 - State/Payer's state no.
  - Box 18 - State Income

Production Management

The following change was added in the Production Management module.

Work Ticket Entry Copy From

In the Work Ticket Entry Copy From window, the Production Start Date field has been added to simplify the process of copying a work ticket.

During the copy process, the system will calculate the number of days between the start date entered here and the source work ticket start date. The difference between the dates will be used to automatically adjust all of the scheduling dates in the source work ticket steps as they are copied.

What's New in Version 2022.2

Update 2 for Sage 100 2022 includes the following enhancements.

Accounts Receivable

The following change was added in the Accounts Receivable module.

Option to Print Zero Balance Customers with No Invoices

The Customers with No Invoices check box has been added to Statement Printing. You can select this check box to print statements for zero balance customers that do not have any invoice detail printing on the statement.

What's New in Version 2022.1

Update 1 for Sage 100 2022 includes the following enhancements.

Inventory Requirements Planning

The Inventory Requirements Planning (IRP) module is now compatible with the version of Production Management that was released in Sage 100 2022. The updated version of Inventory Requirements Planning is automatically installed with update 1 if you have the

Production Management module installed. Inventory Requirements Planning is automatically registered if Production Management is registered, so you do not need a new license key.

Data Conversion and Material Requirements Planning

If you already have the Material Requirements Planning (MRP) module installed, Inventory Requirements Planning is still installed, but you cannot have both modules activated for the same company at the same time. Activating IRP for a company deactivates MRP for that company.

When you open Inventory Requirements Planning Options, you will be asked if you want to convert your MRP data to IRP data. If you convert your MRP data, your MRP data files are deleted after the conversion process is compete. You can choose not to convert your MRP data and proceed with the IRP setup, and this will remove your MRP data.

Maintain Projected Demands

Maintain Projected Demands has been added to the Main menu. You can use Maintain Projected Demands to manually enter demand information before generating the IRP data file that's used to show demand and create work tickets and purchase orders.

Library Master

The following enhancements were added in the Library Master module.

Data File Display and Maintenance Updates

The following changes have been made in Data File Display and Maintenance:

- Two new options have been added to the Operator list in the Filter window:
    - Contains CRLF: Use this operator to find records that contain carriage return/line feed characters.
    - Non Printable: Use this operator to find records that contain non-printable characters.
- In the Select Fields window, you can select up to 25 fields to display in columns in the Key Scan window.

OAuth Authentication Method for SMTP Mail Server

In Company Maintenance on the E-mail tab, you can now select the OAuth authentication method for your SMTP mail server even if you purchased Sage 100 through a perpetual license. Previously the OAuth authentication method was available only if you purchased Sage 100 through a subscription plan.

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What's New in Version 2022

You must have the Payroll module to use the employee self service features, and the employees must have records created in Employee Maintenance

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What's New in Version 2020
(Excerpted from Sage 2020 Upgrade Guide)

Global
The following changes are carried throughout multiple modules.

Expanded Name Fields
The following fields have been expanded to 50 characters:
· Customer name
· Customer contact name
· Vendor contact name
· Confirm to name
· Requested by name

The fields previously held 30 characters. Note that the field for vendor names was expanded to 50 characters in a previous release.

Expanded Fields for Address Information
The following fields have been expanded for customer, vendor, and employee addresses:
· Address lines: from 30 to 40 characters
· City: from 20 to 30 characters
· Country name: from 30 to 50 characters

Changes for Telephone and Fax Fields
The following changes have been made for telephone and fax number fields.
· Telephone and fax number fields have been expanded from 17 to 20 characters.
· The telephone extension field has been expanded from 5 to 6 characters.
· A Type field has been added for customer, vendor, and contact telephone numbers. You can select Work, Cell, Home, or Other.
· A Primary check box has been added for the two telephone number fields in Customer Contact Maintenance and Vendor Contact Maintenance.
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Global

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International Address Support

You can now enter an international address for customers, vendors, and contacts. To support international addresses, the following changes have been made:

· The Country field has been moved above the address lines. A country code is needed to ensure that the correct city and state or province is entered based on the ZIP or postal code.
· ZIP Code fields have been renamed ZIP/Postal Code.
· State fields have been renamed State/Province.
· Telephone and fax number fields support international number formats.
· In Company Maintenance, the following changes were made:
· On the Main tab, the following fields were added: Country, ZIP/Postal Code, City, State/Province.
· An Additional tab was added to this task. The federal and state tax ID number fields were moved to this tab, and fields for contact information and a trade name were added.
· On the Preferences tab, a Default Country Code field was added.

Maintenance Task for State and Province Codes

State/Province Code Maintenance has been added to the Library Master Setup menu. State and province codes are maintained for each country code. You can enter and maintain the state or province name, alternate code, and geocode. The state and province codes for Canada and the United States are prepopulated.

Default Country Code

A Default Country Code field has been added to the Preferences tab in Company Maintenance. The default code will be automatically used in data entry and maintenance tasks, but it can be changed.

Data Conversion

When you convert your company data from an earlier version of Sage 100, USA will automatically be entered as the default country code on the Preferences tab in Company Maintenance.

Various Task Window Updates

To accommodate the expanded fields and longer field labels, some task windows have been resized, and fields were rearranged on others. In some instances in which the field is view-only, it may be truncated due to space constraints.

Report and Listing Updates

Reports and listings have been modified to accommodate updated fields and formats. The longer customer and contact names are accommodated if they print on a separate line or if there is enough space.

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Form Updates
The expanded field sizes are reflected in the work tables, but the forms have not been updated to accommodate the expanded fields.
The Country, City, State/Province, and ZIP/Postal Code fields added in Company Maintenance have been added to the work tables, but they have not been added to the forms. The forms still print the information in the four address lines that were on the window prior to this release.

Country Code Selections Grid Option
A Country Code field has been added to the Selections grid for various form printing tasks. For any source documents with no value in the Country Code field, the default country code entered in Company Maintenance will be used for selection purposes.

Import Jobs
Any Visual Integrator import jobs that include address information **must be modified to include the CountryCode column**, and it must be imported before the ZipCode column.

Payroll Version
If you're using Sage 100 Payroll, **you must upgrade to version 2.20.1**. Earlier versions have not been updated to support international addresses, and you will encounter errors. More changes to support international addresses are planned for

Map Service Choices
You now have a choice of which map service to use when you click a Map button next to address field. A Select Map Service field has been added to the following locations:
- The Preferences tab in User Maintenance.
- The User Settings window accessed from the File menu.

You can select Bing Maps, Google Maps, or MapQuest.
Note: This feature is available if you purchased Sage 100 through a subscription plan.

Export to Excel Button Added for List Boxes
An Export to Excel button allows you to export the contents of a list box to Microsoft Excel. The button has been added for numerous list boxes throughout Sage 100.

As part of this enhancement, the related module option in Role Maintenance has been renamed Allow Export to Excel from Lookups/Grids/Lists.

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Add PII Work Tables To Custom Reports

You can add multiple work tables that contain personally identifiable information (PII) to custom reports. When running the Menu Wizard accessed through Report Manager, if you’re adding a custom report for which work tables that contain PII are available, you’ll have the opportunity to add them. Note that users’ ability to view PII is dependent on their role security. Currently only the General Ledger and Payroll modules include work tables that contain PII.

Admin Rights Not Required for Workstation Synchronization

You no longer need administrative rights on your workstation to run the Workstation Synchronization program that automatically starts after some Sage 100 updates are installed on the server.
To eliminate the need for administrative rights, some files are now installed in a different location. The Sage folder that was previously installed in this location:
C:\Program Files (x86)\Common Files
Is now installed in this location:
C:\Program Data

Desktop Utilities

You can access two utilities from the Sage 100 Desktop File menu.

Customization Import

Use this utility to import custom settings if you were using the classic Desktop in an earlier version of Sage 100 and made any of the following customizations:

- Added tasks to a public or private folder on the My Tasks tab
- Added tasks or shortcuts to other programs to the button bar

If you’re using the latest version of Sage 100 on the same workstation as your earlier version, the utility adds your public and private tasks and shortcuts to other programs to the Favorites panel on the standard Desktop.
To start this utility, on the Desktop File menu, point to Desktop Utilities, and click Customization Import.

Logging Level

Use this utility if asked to do so by Sage customer support. This utility was previously accessed by browsing to the ..\MAS90\Launcher\ folder and double-clicking launcher.logging.exe.
To start this utility, on the Desktop File menu, point to Desktop Utilities, and click Logging Level.

Links to Sage University Training

A Sage University button ( ) has been added to additional task windows in the Common Information and Library Master modules and to the Visual Process Flows Manager window.
Click the button to view a list of training videos related to the task. Depending on your Business Care plan, there may be no charge to watch the videos.

Accounts Payable

The following changes were made in the Accounts Payable module.

Encrypt PII for Inactive Vendors

As a means to comply with consumer privacy laws that require you to either delete or deidentify personally identifiable information (PII) so that it can’t be used to identify an individual, there are two ways to encrypt an inactive vendor’s PII:

- An Encrypt button has been added to the Additional tab in Vendor Maintenance.
- An Encrypt Vendor Personally Identifiable Information utility has been added to the Accounts Payable Utilities menu. You can use this utility to encrypt vendor PII if the vendor’s record has already been deleted in Vendor Maintenance.

After PII is encrypted, it no longer appears in task windows or reports. Furthermore, the data cannot be viewed in Data File Display and Maintenance or accessed through Visual Integrator or external reporting using an ODBC data source. For more information, see *Encryption for Inactive Vendors' Personally Identifiable Information* in the help.
Note: This feature is available if you purchased Sage 100 through a subscription plan.

Reverse Check Run Utility

A Reverse Check Run utility has been added to the Accounts Payable Utilities menu. You can use this utility to reverse an entire check run. Check runs are selected by entering either a register number or a bank code and check number. Checks with a type of Auto (a standard check) and Electronic that are posted to the cash disbursements journal can be reversed.
Note: This feature is available if you purchased Sage 100 through a subscription plan.

New Options for Retaining Paid Invoices

Two new fields have been added to the Additional tab in Accounts Payable Options:

- Months to Retain Paid Invoices (replaces Days to Retain Paid Invoices)
- Purge Paid Invoices During

You can enter a value ranging from 0 to 9,999 in the months field, and select whether paid invoices are purged during period-end or year-end processing.
Note: These fields are available if you purchased Sage 100 through a subscription plan; otherwise, you’ll still have the Days to Retain Paid Invoices field.

1099-NEC Form Added

The IRS is introducing Form 1099-NEC, used to report nonemployee compensation, for tax year 2020. Nonemployee Comp (to be used for Form 1099-NEC) is now available to select in the following locations:

· Vendor Maintenance — Default Form field on Additional tab

· 1099 Payment History window — 1099 Form Type field

· A/P Invoice Data Entry — (1099 Payment) Form field on the Header tab

· Manual Check and Payment Entry — 1099 Form field on the Lines tab

Because From 1099-NEC is now used for nonemployee compensation, changes have been made to Form-1099 MISC. Included in the changes, Box 7 is now used for the Payer Made Direct Sales of $5,000 or More check box. (For more details on the form changes, see the IRS website: www.irs.gov/instructions/i1099msc
In Vendor Maintenance, the Misc Box 9 check box has been renamed Payer Made Direct Sales $5000+. This check box is now used for Box 7 on Form 1099-MISC.
If you’ve already recorded nonemployee compensation for tax year 2020 in Box 7, a utility is available to move the totals to Box 1. Contact Sage Support for more information.

Unlimited Cost Types in Open Invoice By Job Report

You are no longer limited to selecting only 12 cost types when printing the Open Invoice by Jobs Report. In the Cost Types to Print section of the task window, the check boxes for individual cost types have been replaced with a Select Cost Types button. Click this button to open the Cost Type Selection window and select all cost types needed for the report.

Relocation of Paperless Option in Vendor Maintenance

To access the Paperless Office Delivery Options window from Vendor Maintenance, click the arrow in the top-right corner of the window, and then select Paperless Delivery Options.

Accounts Receivable

The following changes were made in the Accounts Receivable module.

eInvoicing for Accounts Receivable Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a link for online payments. Customers can use the payment link to make online credit card and ACH payments. If you’re using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.
There are two ways to enable eInvoicing for customers:

· To enable the feature for an individual customer, select the eInvoice Payments check box on the Additional tab in Customer Maintenance.

· To enable the feature for a range of customers, use the Global Customer Field Change utility.

An eInvoice Payments check box has been added to the Header tab in Invoice Data Entry. The check box is selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.
If the check box is selected, the invoice information is sent to Paya when the Sales Journal is updated, and the email with the invoice information and Pay Now link is then sent to the customer.
An eInvoice Payments button has been added to the Cash Receipts Deposit window. Click this button to import online payments.
A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration.
Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance. For more information, see the *eInvoicing* article in the Sage 100 help.

A utility, eInvoicing Error Log Viewer, has been added to the Accounts Receivable Utilities menu. After you update the Sales Journal, a message lets you know if there were any invoices that should have been sent to Paya Connect but were not. Use the viewer to see which invoices were not sent, view error information, and send the invoices to Paya Connect.
Note: This feature is available if you purchased Sage 100 through a subscription plan.

Viewing Addresses in Invoice History Inquiry

In Invoice History Inquiry, the address no longer appears on the Main tab. Click the new Addresses button to view the bill-to and ship-to addresses for the invoice.

New Options for Retaining Paid Invoices

Two new fields have been added to the Additional tab in Accounts Receivable Options:

- Months to Retain Paid Invoices (replaces Days to Retain Paid Invoices)
- Purge Paid Invoices During

You can enter a value ranging from 0 to 9,999 in the months field, and select whether paid invoices are purged during period-end or year-end processing.
Note: These fields are available if you purchased Sage 100 through a subscription plan; otherwise, you'll still have the Days to Retain Paid Invoices field.

Encrypt PII for Inactive Customers

As a means to comply with consumer privacy laws that require you to either delete or deidentify personally identifiable information (PII) so that it can't be used to identify an individual, there are two ways to encrypt an inactive customer's PII:

- An Encrypt button has been added to the Additional tab in Customer Maintenance.
- An Encrypt Customer Personally Identifiable Information utility has been added to the Accounts Receivable Utilities menu. You can use this utility if the customer's record has been deleted in Customer Maintenance.

After PII is encrypted, it no longer appears in task windows or reports. Furthermore, the data cannot be viewed in Data File Display and Maintenance or accessed through Visual Integrator or external reporting using an ODBC data source. For more information, see *Encryption for Inactive Customers' Personally Identifiable Information* in the help.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

Relocation of Paperless Option in Customer Maintenance

To access the Paperless Office Delivery Options window from Customer Maintenance, click the arrow in the top-right corner of the window, and then select Paperless Delivery Options.

Custom Office

The following changes were made in the Custom Office module.

Improved Grid Customization

When you're editing a panel with a grid, right-clicking within the grid now opens the Customize Grid Definition window. The appearance of the grid is virtually identical to its appearance in Sage 100 task windows. As you edit the grid

- Drag and drop columns to rearrange them.
- If the panel has a primary and secondary grid, drag and drop columns to move them from one grid to another.
- Click a column label to open the Column Properties window, which lets you specify various properties, such the column length and description, and whether it's locked.
- Click the Add Column button to add additional columns.
- Access the Bulk Hide window, which lets you set the Hidden option for all columns in the grid.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

Apply Grid Customizations to a Customization Group

When selecting a customization group from the User list in the Customizer Panel Selection window, you can now customize the grid(s) included in the panel. The customized grids will be available to all users in the customization group.

Save UDF Changes in Pending Status

It's no longer necessary to choose between updating your user-defined field (UDF) changes right away or discarding them. UDF additions and modifications are now saved in a pending table. In the User-Defined Fields window, when you click Cancel, a message will let you know that your changes have been saved. You can return to the User-Defined Fields window at a later time to continue working on your changes and update them when you're ready.

Inventory Management

A new task, Pending Changes Summary, has been added to the Custom Office Main menu. You can also access this task by clicking the Summary of Pending Changes button in User-Defined Field and Table Maintenance.

Use this task to view a list of pending changes. Click the Update All button to update all changes. If you have changes for multiple tables, a message appears after each table has been updated. You can click Continue to update the remaining tables or click Stop to leave the remaining changes in pending status to be updated at a later time.

When you have changes in pending status, a Pending folder appears beneath the module list in User-Defined Field and Table Maintenance. Expand the folder to view a list of tables with pending changes. You can select a table and click the Delete Pending Changes button to delete all pending changes for the table.

You can schedule an update of the pending changes using Task Scheduler.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

Mask Information in Data Entry Fields

A Mask Display check box has been added to the Options tab in the Multi-Line Definition window. Select this check box to display filled-in circles in place of the actual characters when data is entered into this field.

Note that the data is **not** encrypted and it is masked only when displayed in task windows. For example, the actual characters would appear if this field is added to a lookup view or if you viewed the table in Data File Display and Maintenance.

A Mask Display check box has also been added to the Add/Edit Field window. If you select this check box, the Mask Display check box in the Multi-Line Definition window is selected by default when you add the UDF to a panel.

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Inventory Management

The following changes were made in the Inventory Management module.

Expiration Dates for Lot and Serial Items

Expiration dates can be added for items with lot or serial numbers when items are received into inventory or produced through Bill of Materials. Expiration dates can be manually entered, or you can enter settings to automatically calculate them. You can also calculate sell-by, use-by, and return dates to determine how many days before or after an item's expiration date it can be distributed.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

The expiration date feature must be enabled in Inventory Management Options, and the related settings are entered in this task. However, you can override the settings for product lines and individual items in Product Line Maintenance and Item Maintenance.

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Utility for Adding and Changing Expiration Dates

The Change Lot and Serial Expiration Dates utility has been added to the Inventory Management Utilities menu. Use this utility to add expiration dates for existing items and to change any expiration dates that have already been entered.

Note: Before using the utility, you must:

1 Enable the expiration date feature in Inventory Management Options.

2 For applicable items, select the Track Lot/Serial Expiration Date check box in the Lot/Serial Expiration Settings window, accessed using the More button in Item Maintenance.

For more information, see *Change or Add Expiration Dates for Lot and Serial Items* in the Sage 100 help.

Change Lot/Serial Expiration Date from Item Maintenance

To change expiration dates for lots or serial numbers one at a time, click the Change Lot/Serial Expiration Date button, which has been added to the Cost Detail tab in Item Maintenance.

Option to Exclude Expired Items From Reorder Calculations

An Include All Expired Lot/Serial Items in Quantity Available check box has been added to the following windows:

- Auto Reorder Selection (Purchase Order)
- Inventory Reorder Report (Inventory Management)

You can clear this check box to exclude expired items from the calculation of the available quantity.

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Forms, Reports, and Registers

A new report, Lot Serial Expiration Status Report has been added to the Inventory Management Reports menu. Use this report to view a list of items' expiration dates. You can also use the report to view a list of items that are missing an expiration date or a list of items that are expired as of a specified date.

The expiration date is printed on the reports and registers listed later in this section if the Track Lot/Serial Expiration Dates check box is selected in Item Maintenance.

If applicable, the expiration date prints on the following registers:

- Bill of Materials registers:
- Production Register
- Disassembly Register
- Inventory Management registers:

- Transaction Register
- Physical Count Variance Register
- Count Card Variance Register
- Purchase Order registers:
- Receipt of Goods Register
- Return of Goods Register
- Material Requisition Register

If applicable, the expiration date is printed on the following reports:

- Bill of Materials reports
- Production History Report
- Inventory Management
- Inventory Detail Transaction Report
- Lot/Serial Transaction History Report
- Purchase Order
- Receipt History Report (if the Print Lot/Serial Information check box is selected)
- Return Merchandise Authorization reports (if the Print Lot/Serial Information check box is selected)
- Return Reason Report
- RMA Receipts History Report
- Sales Order reports (if the Print Lot/Serial Distributions check box is selected)
- Shipping History Report
- Open Sales Order Report
- Open Sales Order by Item Report
- Open Sales Order by Promise Date Report
- Open Sales Order by Job Report
- Lot and Serial Number History Report

The expiration date has been added to the worktables for the following forms to make it easier to add the field to the forms if needed.

- A/R invoice (historical)
- B/M production label

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· I/M receipts label
· P/O return order
· R/A customer RMA
· R/A RMA receiver
· S/O sales order

· S/O picking sheet
· S/O invoice
· S/O packing list

Job Cost

The following changes were made in the Job Cost module.

Option for Expensing Work-In-Process Costs

A new field, Recognize WIP when Billing % Complete Jobs, has been added to the Main tab in Job Cost Options. This field is available when the (Post to General Ledger) Work in Process check box is selected.

There are two options available in this field:

· Select Actual Costs to expense WIP costs using actual costs posted to the job that have not been previously billed as of the job billing date.
· Select % of Estimate to expense the WIP costs as cost of goods sold by multiplying the revised estimated cost by the job's completion percentage less the previously recognized estimated costs.

After converting company data from an earlier version of Sage 100, the default selection is Actual Costs. For new companies, the default selection is % of Estimate. If you change the selection in this field, and there are open jobs that have been billed using the original method, the next time you process an invoice in which WIP is accrued, that accrual will include a reversal for costs recognized when you were using the previously selected WIP accrual method. Consider processing a zero-dollar invoice after making the change to process the reversal.

Actual % Complete Field

A new field, Actual % Complete, has been added to the locations listed below so that you can enter the job’s completion percentage when processing invoices for the job.

· S/O Invoice Data Entry Header tab
· Shipping Data Entry Shipping tab

This field is available if:

· The Job Cost module is integrated with Sales Order.
· In Job Cost Options, % of Estimate is selected in the Recognize WIP when Billing % Complete Jobs field.

· In Job Maintenance, for the selected job, Percentage of Completed is selected in the Acct Method field, and Fixed is selected in the Billing Method field.

A view-only Job No. field has also been added to the Shipping tab in Shipping Data Entry.

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eInvoicing for Job Cost Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a link for online payments. Customers can use the payment link to make online credit card and ACH payments. If you’re using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.

An eInvoice Payments check box has been added to the Header tab in Job Billing Data Entry. The check box is available and selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.

If the check box is selected, the invoice information is sent to Paya when the Job Billing Register is updated, and the invoice is then emailed to the customer. For more information, see the *eInvoicing* article in the Sage 100 help.

A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration. Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance. For more information, see the *eInvoicing* article in the Sage 100 help.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

Library Master

The following changes were made in the Library Master module.

Conversion Options

Two new options in the Convert Module Data Files window allow you to do more when converting company data.

Convert SAP Crystal Reports

If you select the Convert SAP Crystal Reports check box, the custom reports and forms for active modules are converted to the current level when you run conversion. After the company data conversion is complete, anyone logged into Sage 100 can continue working while the reports and forms are being converted.

The amount of time needed to convert company data is not affected by the SAP Crystal Reports conversion.

Update Custom Office Panels to Current Level

If you select the Update Custom Office Panels to Current Level check box, the Custom Office panel update is run for any customized panels for the companies being converted. This update runs without any prompts.

Purchase Order

The following changes were made in the Purchase Order module.

Apply Multiple Purchase Orders to An Invoice or Receipt

In Receipt of Invoice Entry and Receipt of Goods Entry, an Apply Purchase Orders button has been added next to the Purchase Order Number field on the Header tab. After selecting the first order for the invoice or receipt, click this button to add additional orders.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

The first purchase order applied is considered the primary order. To add additional orders, the information in the following fields must match:

- Terms code
- Sales tax schedule for purchase order
- Sales tax schedule for purchase address
- Shipping code (entered in Ship Via field)

Reports, Forms, and Registers

The documents listed below have been modified to display "Multiple" in the purchase order number field if more than one order has been applied to the applicable document.

- Receipt of Goods Register
- Receipt of Invoice Register
- Daily Purchases Journal
- Receipt History Report
- A/P Invoice History Report

Inquiry Windows

In Receipt History Inquiry and A/P Invoice History Inquiry, "Multiple" appears in the purchase order number field if multiple purchase orders were applied to the receipt or invoice. You can click the Multiple Purchase Orders zoom button to view a list of orders applied to the document.

In both inquiry windows, if multiple purchase orders with prepayments were applied to the receipt or invoice, the total prepayment amount from all orders appears in the prepayment field. You can click the Prepayments button to view a list of applied purchase orders, along with the prepayment amount and check number.

Landed Cost Calculation

If entry of landed cost is enabled in Purchase Order Options and Automatic Update is selected for the FRGHT cost type in Landed Cost Maintenance, the landed cost for all purchase orders applied to a receipt of goods is totaled and allocated to each line item.

If entry of landed cost is not enabled, the freight amount for all orders applied to the receipt is totaled and allocated to each line item based on the selection in the Allocate Freight on a Line Item Basis field in Purchase Order Options.

Sales Order

The following changes were made in the Sales Order module.

eInvoicing for Sales Order Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a Pay Now link. Customers can click the Pay Now link to make online credit card and ACH payments. If you’re using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.

An eInvoice Payments check box has been added to the Header tab in Invoice Data Entry. The check box is available and selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.

If the check box is selected, the invoice information is sent to Paya when the Sales Journal is updated, and the invoice is then emailed to the customer. For more information, see the *eInvoicing* article in the Sage 100 help.

A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration.

Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance or by using the Global Customer Field Change utility. For more information, see the *eInvoicing* article in the Sage 100 help.

Note: This feature is available if you purchased Sage 100 through a subscription plan.

Visual Integrator

The following changes relate to the Visual Integrator module.

Change for Import Jobs that Include Addresses

Any import jobs that include address information **must be modified to include the CountryCode column**, and it must be imported before the ZipCode column. This requirement is related to changes made to support international addresses. For more information, see International Address Support on page 4.

Office 365 Integration

A new screen has been added to the Sage 100 Office Configuration wizard. On the Microsoft Power Apps and Power Automate screen, if you select the check box, the information needed to create a custom connector appears on the last page of the wizard.

The same information is automatically copied to the Windows clipboard so that you can paste it into a document to reference when setting up your custom connector. This is required if you plan to use Power Automate or Power Apps that work with your Sage 100 data.

Retired Features

The following features are no longer available in version 2020.

Classic Desktop

The classic version of the Sage 100 Desktop is no longer available. To learn more about the standard version of the Desktop, refer to the following resources:

· To watch a video providing an overview of the standard Desktop, click the Help tab at the top of the Desktop, and then click Tour the Desktop.

· To read detailed instructions on using and customizing the Desktop, see chapter 2, *Touring the Software*, in the *Getting Started Guide*.

To view this guide, click the Web Content tab at the top of the Desktop, click Resources, and then click Getting Started Guide. If the guide is opened in the embedded browser, you can right-click the tab and then select Open in new window.

If you were using the classic Desktop and had created public or private tasks or customized the button bar, you can run a utility to add those tasks and/or programs to the Favorites panel in the standard Desktop. For more information, see Customization Import on page 6.

Changes in Version 2019

This chapter describes the changes made in the Sage 100 2019 release and the subsequent updates for that version. Installation and global changes are listed first followed by module changes, third-party features, and then retirements.

Global

Global changes are carried throughout multiple modules.
The following changes were made in version 2019.2.

Automatic Update of Daily Transaction Register

A security event has been added to Role Maintenance that allows you to automatically update the Daily Transaction Register. For any series of journal and register updates that concludes with the Daily Transaction Register, you will not receive a prompt to print and update the register if the security event check box is selected for your role. The Daily Transaction Register will be printed and updated automatically.

The security event has been added for the following modules:

· Accounts Payable
· Accounts Receivable
· Bank Reconciliation
· Bill of Materials

· Inventory Management
· Job Cost
· Purchase Order
· Sales Order
· Work Order

Warning Message for Document Dates

A Use Document Date Warning check box has been added to the Preferences tab in Company Maintenance. After selecting this check box, you can enter a value in one or both of the following fields:
· Document Date - Prior Periods to Allow Outside of Current Period
· Document Date - Future Periods to Allow Outside of Current Period

These values are compared to the current period entered in the module's Options task to determine when a date falls outside of the valid date range. Alternately, in Bill of Materials, Inventory Management, Purchase Order, Return Merchandise, and Sales Order, the values are compared to the current calendar month and year if Calendar Months is selected in the Base Inventory Periods On field in Inventory Management Options.
If you start to create a document with a date that falls outside of the valid range, you'll receive one of two messages:
· If you're using the default date for that session, a warning message appears, and you can click OK to continue.
· If you manually enter the date, a warning message asks if you want to proceed. If you click Yes to continue with the date entered, a record is written to the Activity Log.
If you import records with a document date falling outside of the specified range through Visual Integrator, a warning is written to the Import Log.
Document dates are checked in the following tasks:
· Bank Reconciliation:
· Reconcile Bank
· Check Deposit and Adjustment Entry
· Bill of Materials
· Disassembly Entry
· Production Entry
· Accounts Payable
· Invoice Data Entry
· Repetitive Invoice Selection
· Manual Check and Payment Entry
· Accounts Receivable
· Invoice Data Entry
· Cash Receipts Deposit
· Repetitive Invoice Selection
· Inventory Management
· Transaction Entry
· Job Cost

· Job Billing Selection
· Purchase Order
· Material Requisition Issue Entry
· Purchase Order Entry
· Receipt of Goods
· Receipt of Invoice Entry

· Return of Goods
· Return Merchandise Authorization
· Generate Transactions
· RMA Entry
· Receipts Entry
· Sales Order
· Sales Order Entry
· Invoice Data Entry

Note: This feature is available if you purchased Sage 100 through a subscription plan.

View Paperless Documents from Journal Drill Down Window

A Paperless Viewer button has been added to the Journal Drill Down window. If you've set up Paperless Office and have the appropriate security setup, you can click the button to open the Journal and Register Viewer. The button is available when you access the Journal Drill Down window from the following tasks:

· A/P Invoice History Inquiry
· A/P Payment History Inquiry
· A/R Invoice History Inquiry
· G/L Account Maintenance/Inquiry
· G/L Source Journal Maintenance
· I/M Item Maintenance/Inquiry
· P/O Receipt History Inquiry

Links to Sage University Training

A Sage University button (with a graduation cap icon) has been added to additional task windows. Click the button to view a list of training videos related to the task. Depending on your Business Care plan, there may be no charge to watch the videos.

The following changes were made in version 2019.

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Auto-Complete for Account Numbers

The auto-complete feature has been added for general ledger account number fields. You can now search for an account by entering any of the following in an account number field:

- Account number
- Main account
- Account description
- Account group

As you type, a list of accounts matching your entry appears, and you can select one from the list.

This feature is automatically enabled for all users. You can disable the feature for individual users in Library Master > User Maintenance.

To enable this feature, run the Build Search Index utility on the Library Master Utilities menu to create an index. As you add accounts, you'll need to run the utility again to index the new records.

Print Status Updated When Using Keep Open Check Boxes

In the tasks listed below, when you print a document while the Keep Window Open After Print or Keep Window Open After Preview check box is selected, the document's print status will reflect that the document has been printed. Previously the document's print status would have been set to not printed.

- Invoice Printing (Job Cost)
- Purchase Order Printing
- Return Order Printing
- Sales Order Printing
- Picking Sheet Printing
- Shipping Label Printing
- Invoice Printing (Sales Order)

Security Update for E-mail Delivery

Transport Layer Security (TLS) 1.2 is now supported when sending e-mails through Paperless Office and eBusiness Manager.

Message Enhancements

Some message windows now have a More Info link. When you click this link, you will see another message with additional information or a related help article.

When you're opening a task and a message appears indicating that a file is locked, you can click More Info to see who has the file locked and in which task.

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Copy Feature for Custom Lookup Views

A Copy button has been added to the User Lookup Wizard. You can now copy a custom lookup for other companies and users. Also, selecting companies and users is now easier—check boxes have been added to the company and user list.

Links to Sage University

A Sage University button (with a graduation cap icon) has been added to additional task windows.
You can click the button to view a list of training videos related to the task.
Depending on your Business Care plan, there may be no charge to watch the videos.
The Sage University button has been added to the tasks windows listed below.

- Accounts Payable
- ACH Maintenance
- Expense Distribution Table Maintenance
- Invoice Payment Selection
- Repetitive Invoice Selection
- Vendor Maintenance
- Accounts Receivable
- Cash Receipts Entry
- Commission Edit Maintenance
- Customer Maintenance
- Invoice Printing
- Repetitive Invoice Entry
- Repetitive Invoice Selection
- Salesperson Maintenance
- Bank Reconciliation
- Auto Check Reconciliation
- Bank Code Maintenance
- Check, Deposit and Adjustment Entry
- Positive Pay Export
- General Ledger
- Transaction Journal Entry
- Job Cost
- Contractor Maintenance
- Job Maintenance

Custom Office

- Library Master
- Activity Log

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Payroll Module Removed from Installation Program

The Payroll module is no longer part of the Sage 100 installation program. To install the module, use the standalone installation program. For information on installing the Payroll module, see the Sage 100 Payroll Installation and Upgrade Guide. The guide is available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Custom Office

You can now customize the columns and buttons on the following Paperless Office viewers:

- Journal and Register Viewer
- Period End Report Viewer
- Report Viewer

General Ledger

The following changes were made in the General Ledger module.

Consolidate Journal Entries in General Journal PDF

When printing the General Journal and selecting PDF output, you can now consolidate all General Journal entries into one PDF. A module option, Print Multiple PDFs for General Journal, has been added in Role Maintenance. Clear the check box for this option to consolidate the entries.

Account Appears on All Pages of Detail Reports

The account number and description are now printed on each page of the General Ledger Detail Report and General Ledger Detail by Source Report.

Encrypted Bank Information

Bank descriptions and account numbers are now encrypted. Bank descriptions are still visible in windows and on reports and forms.
A new security event, “Allow Viewing, Printing and Editing of Highly Sensitive Personally Identifiable Information,” determines whether users will be able to view and print bank account numbers.
For more information, see *Additional Security for Bank Information* in the help.

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Inventory Management

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Option to Include Inactive Items in Physical Count

An Include Inactive Items check box has been added to the Physical Count Worksheet task window. If you select this check box, inactive items are printed on the worksheet and included in Physical Count Entry and on the Variance Register. If the check box is cleared, inactive items are excluded from the physical count process.

Option to Print Variances Only

An Only Print Variances on Register check box has been added to the Physical Count Variance Register task window. If you select this check box, all items for which there is no variance are omitted from the register.

Item Quantity Inquiry Button in Physical Count Entry

An Item Quantity Inquiry button has been added to the Lines tab in Physical Count Entry. Click this button to view quantity information for the selected item.
You can click the arrow next to this button and select Item Inquiry to open the Item Inquiry window, or select Item Memo to view, create, or maintain memos for the selected item.
Note: To see the Item Memo option, it must be enabled in Memo Manager Maintenance:
1 Select Inventory Management > Setup > Memo Manager Maintenance.
2 In the Memo Type field, select Item.
3 Select a role.
4 To add Physical Count Entry to the Task list, click the Reset All to Defaults button.
5 For Physical County Entry, in the Memo option column, select Show or Maintain.

Library Master

The following changes were made in the Library Master module.

Data File Display and Maintenance

Data File Display and Maintenance has been upgraded with several new features.
· If you're using Sage 100 Premium, you can now access files stored in a SQL database.
· To select a file in the File Name field, you can enter the company code, followed by a colon, followed by the file name. For example: ABC:AR_Customer

· For files in modules upgraded to Business Framework, the Data File Display and Maintenance – Edit window now lists all fields and values in a grid.
Encrypted fields are not available to edit, but you can select the Allow Read-Only Fields to Be Changed check box to edit the read-only fields.
Validation is now performed on date and numeric fields.
· For multi-segment keys, the key scan filter allows you to filter the records using one or more segments of the key. Enter the selected key column separators as needed to indicate which segments of the key your search criteria must match.

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For example, the key for customer records is ARDivisionNo:CustomerNo. To search for customer number 02-CAPRI, you can enter the following in the Key field:
:CAPRI
Alternately, you can select a different character to separate the segments of the key in the Key Column Separator field. If you select the tilde (~) character, you can then search by entering the following in the Key field:
~CAPRI
Note that you don’t need to enter the full value contained in the segment. Continuing with the above example above, you could also enter the following:
~CAP
You can filter by multiple segments. For example, to view records in the GL_DailyPosting file from 2018 with AP as the source journal, enter the following in the Key field:
2018:AP

· For modules that have been upgraded to Business Framework, you can click Add to add a record.

· If you adjust the width of the Data File Display and Maintenance – Key Scan window, and then close the window to run a second scan, the window reopens at the width that you used previously. The Key and Data columns are automatically adjusted to fill the width of the window.

· In the Data File Display and Maintenance – Key Scan window, when entering search criteria in the Search field, you can use a special character to define the scope of the search:

· To search for text in any location within the current key, add an asterisk (*) at the beginning of your search text. For example: *14072

· To search for text within the current key and the data record, add a percent symbol (%) at the beginning of your search text. For example: %14072

· The Print button has been removed.

When starting Data File Display and Maintenance using the Run Program window accessed on the File menu, you can now enter SY_FileDisplay_UI.

Activity Log

The following changes have been made to the Activity Log:

· Changes made in Role Maintenance and User Maintenance are now tracked. A new activity type, Security, has been added and is used to categorize these changes.

· You now have the option to track changes in Company Maintenance and System Configuration. For more information, see Activity Log Configuration Window on page 28.

· To improve performance, there is now a configurable limit on the number of records that display when you open the Activity Log window. If the number of records in the log file exceeds this threshold, the Activity Log / window automatically opens before any records are loaded. Use the Activity Log - Filter window to filter the records and then view them in the Activity Log window.

To change the auto-load threshold, click the Configure button on the Activity Log

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window.
· A Cancel button is now available while the progress bar indicates that records are loading so that you can cancel the process if needed.
· A Refresh button has been added to the window. Click this button to reload the records, including any new ones created after you started the session.
· The newly added first column in the grid contains an asterisk (*) if a log file is available for the record.
· The Purge button now appears below the list of records. Also, a purge utility has been added to the Utilities menu. For more information, see Activity Log Purge Utility on page 29.
· When purged, records are either deleted or added to an archive file based on settings in the Activity Log Purge Configuration window, which is described on page 29.
· You can view purged records stored in an archive file by clicking the History button and, in the Select Archive Year window, selecting a year. Archived records from that year are then displayed in the Activity Log window.

Activity Log Configuration Window

The Activity Log Configuration Window, accessed by clicking the Configure button in the Activity Log window, allows you to set various options. You can use this window to:
· Control how many records are loaded by default, either by entering a value or setting a date range.

· Specify whether to track changes made in Company Maintenance and System Configuration.
· Specify how data is purged.
· Specify what information is recorded when errors occur in Sage 100.
For more information, refer to the on-screen help that appears at the bottom of the configuration window when you click one of the rows.

Activity Log Purge Utility

You can use the Activity Log Purge utility to purge records from the Activity Log file.
To access the utility:
· Click the Purge button on the Activity Log window.
· Select the task on the Library Master Utilities menu.
When purged, records are either deleted or added to an archive file based on settings in the Activity Log Purge Configuration window, which is described in more detail in the next section. You can schedule automatic purges using Task Scheduler.
Archive files are stored here: ..\MAS90\MAS_System\Archive

Activity Log Purge Configuration Window

Click the Activity Log Purge Configuration button to open the configuration window.
Use this window to control how many records are loaded by default and specify how data is purged.
Note that the default setting for the Minimum Days to Keep field is 365; therefore, the Records to Purge list may be empty when you initially start the utility.

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Activity Log Filter Window

The Activity Log Search window has been renamed Activity Log Filter. In addition, the following changes have been made:

· You can filter records by company code and module code.
· You can enter search text to filter records by the text in the Description column.
· File Display/Maintenance and Visual Integrator have been added as options to filter records.

Activity Log Report

The following changes were made to the Activity Log Report task window:

· An Archive Year field has been added to the Activity Log Report. If you have archived records, you can select a year in this field, and only the archived records from that year are included in the report.
To include unarchived records on the report, select Current Activity in the Archive Year field.

· You can filter the report by module using the Module Code fields in the Selections grid.

User ID Field Expanded

The User ID field on the E-mail tab in Company Maintenance has been expanded to hold 254 characters.

Keep Window Open Check Box in Rebuild Key Files

A Keep Window Open check box has been added to the Rebuild Key Files window. If you select this check box, the window remains open after you rebuild files, but the company, module, and file selections are cleared.

Paperless Office

The following changes were made in the Paperless Office module.

Text Formatting Options for Messages

A new message editor has been added to Electronic Delivery Message Maintenance and to the Edit Message window accessed through the Customer, Employee, and Vendor Viewer windows. The editor features a tool bar with text formatting options, including the ability to:

· Change the text color, font, and size
· Use bold or italic text
· Create bulleted and numbered lists
· Insert links and images

Square Brackets Replace Angled Brackets for Merge Fields

Previously the merge fields were enclosed in angled brackets (< >). However, the new message editor is HTML based, and angled brackets are reserved for a specific

purpose in HTML. Therefore, square brackets ([ ]) are now used to enclose the merge fields.
If you have existing messages that contain merge fields in your earlier version of Sage 100, the angled brackets will be replaced with square brackets when you convert your data. For example, <DocumentNo> will be converted to [DocumentNo].
If you have message fields that contain an angled bracket that is not being used to enclose a merged field, the bracket is not converted, and an entry is written to the Conversion Log.
Angled brackets used for merge fields in the Subject field are also converted, but the Subject field does not support formatted text; only plain text is allowed.
Be sure to test any messages that were saved in your prior version of Sage 100 after converting your data.
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Paperless Office

Size of Message Field Increased

The message field holds 7168 characters, increased from 4096. However, the special characters used in the HTML code count toward this limit.

New Merge Fields

Three new merge fields have been added in Electronic Delivery Message Maintenance:
· [CustomerPoNo] for sales orders and Accounts Receivable and Sales Order invoices
· [InvoiceDueDate] for invoices
· [ShipDate] for sales orders and Sales Order invoices
The merge fields are available depending on which module and document is selected.
Also a Copy Merge Field to Clipboard button has been added to the window. Click this button to copy the selected merge field to the Windows clipboard and then paste it in multiple locations.

Cc and Bcc Options for E-mail Address

You can now specify whether the e-mail addresses used when e-mailing documents are added to the To, Cc, or Bcc field when e-mails are sent.
In the locations listed below, a Recipient field has been added; use this field to select To, Cc, or Bcc.
· Paperless Office Delivery Options (accessed from Customer Maintenance and Vendor Maintenance)
· Electronic Delivery (accessed from the customer, employee, and vendor viewers)
· Paperless Office Selection (accessed from all reports supported by Paperless Office)
When converting data, To is automatically selected in the Recipient field for the existing e-mail addresses.
In the Paperless Office Delivery Options window accessed through Employee Maintenance, the E-Mail Address field has been relabeled as the To field, and Cc

and Bcc fields have been added. When converting data, existing e-mail addresses are added to the To field.
E-mail addresses entered in the Cc and Bcc fields are included in the customer, employee, and vendor listings if the option to print Paperless Office delivery options is selected.

Additional Attachments When Emailing Forms

In the Electronic Delivery for Forms window, you can now select additional attachments to include when emailing forms. You can select multiple attachments, and there is no restriction on the file type.

PDF File Name Options

A PDF File Name field has been added in Form Maintenance. In this field, if you select Document No., the document number is used as the file name for the PDF that is attached to the email. The full description is still used for the PDF file that is stored in the PDF directory.
If you select Full Description, the file name will vary depending on the document type. The file naming convention for this option is the same that was used in earlier versions of Sage 100.

Option to Copy Salespeople When E-mailing Forms

A Paperless button has been added in Salesperson Maintenance. Click this button to open the Electronic Delivery Options window and specify whether the salesperson will receive a copy of orders, invoices, and statements when they are e-mailed to customers from data entry, inquiry, and history tasks.

Search by Posting Date in Journal and Register Viewer

A Posting Date column has been added to the list box in the Journal and Register Viewer. When you click the Search button, you can include a posting date or range of posting dates in the search criteria.

Updated Printer Driver

The Amyuni PDF Converter, the virtual printer driver used to create PDF documents, has been updated to version 6.0.1.1.

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Purchase Order

The following changes were made in the Purchase Order module.

Change for Drop-Ship Purchase Orders

In Purchase Order Entry and Receipt of Invoice Entry, if Drop Ship is selected in the Order Type field, the Work Order field on the Lines tab is not available.
When copying from a purchase order in Purchase Order Entry, if Drop Ship is selected in the Order Type field for the new purchase order, no history or work order information is copied from the source document.

Data Conversion

When converting your data after upgrading to version 2019, work order fields for drop-ship inventory lines and the corresponding history detail lines are cleared in purchase order and receipt of invoice records. History detail records that do not have corresponding data entry records are not affected.
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