



Sage Master Builder

Release Notes

sage

NOTICE

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Fixes - Version 17.101 12/2011

General

Resolved a delay users may experience when opening a new menu option from the main menu.



Enhancements - Version 17.101

General

Cumulative enhancements and fixes

Sage Master Builder version 17.101 is cumulative and contains all previous enhancements and fixes from version 17.1.

Internet access required for Sage Master Builder

Sage Master Builder features such as printing or efilng W-2s or 1099s, submitting enhancement requests, or downloading periodic product or tax updates all require Internet access. To take advantage of these features, please ensure any workstation or server that Sage Master Builder is installed on has access to the Internet.

During installation of Sage Master Builder version 17.101, the computer serving as the Sage license server must be able to connect to the Internet to obtain licenses. Once installation is complete, you can check out license uses for each computer where Sage Master Builder is installed, then disconnect the Sage license server from the Internet.

Licensing

Some applications previously part of the Sage Master Builder core have been removed and are now sold separately. Any modules previously owned will automatically be part of your current license information.

"Core" refers to the basic program, exclusive of the additional modules. Additional module licenses include:

1. Inventory
2. Document Control
3. Equipment Management
4. Estimating (already separate)
5. Service Receivables and Inventory (already separate)

With Sage Master Builder 17.101, we are moving to a new License Administration program. The new License Administration program will allow customers to utilize the licensed uses and modules that they have purchased. For more information on setting up the Sage license server in your environment, log on to the Sage Customer Portal and subscribe to Knowledgebase article KB34858.

Your Sage Master Builder software automatically refreshes license information from Sage daily. The licenses give you access to the various modules of Sage Master Builder. As you purchase or remove license activations, the Sage license server automatically updates this information in your system. You can also select to update the licensing information from Sage on demand.



Fixes - Version 17.101

General

Cumulative enhancements and fixes

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Resource Center renamed to Info Center

The Resource Center, currently available in Sage Master Builder **Help > Customer Resources** and Sage Master Builder **Help > What's New > Resource Center**, has been renamed to Info Center.

1-8 General Ledger Setup

The labels now display correctly in 1-8 General Ledger Setup when viewed at 125%.



Known Issues and Comments - Version 17.101

General

Sage.CRE.HostingFramework.Service v3.2 has stopped working, error message is received during licensing installation.

Windows Server 2008 R2 comes with .NET 3.5.1 loaded but not installed, so Sage Master Builder does not install it automatically during installation.

If you attempt to install Sage Master Builder 17.101 without .NET 3.5.1 installed, you will receive the following message during the licensing installation: "Sage.CRE.HostingFramework.Service v3.2 has stopped working." When you click OK, the installation continues but the services have not been installed, so Sage Master Builder cannot open. The Sage.CRE.HostingFramework Service will not install unless .NET 3.5.1 has been installed.

To install .NET 3.5.1 on Windows Server 2008 R2:

- 1 In the **Server Manager** interface, select **Add Features** to display a list of possible features.
- 2 In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.
- 3 Once you expand **.NET Framework 3.5.1 Features**, you will see two check boxes. Check the box next to **.NET Framework 3.5.1** and click **Next**.
- 4 In the **Confirm Installation Selections** interface, review the selections and then click **Install**.
- 5 Allow the installation process to complete and then click **Close**.



NOTE: Enabling .NET Framework 3.5.1 may require a reboot.

Installation to a network drive from a local drive is no longer available

In previous versions of the program, such as Version 14.2, you could run installation twice, installing to your local drive and then to a network drive to update system reports and report forms. Due to changes to the installer, you can no longer run a second installation to a network drive. A second installation on a computer only reinstalls the program to the local drive again.

You can, however, update system reports and report forms on a network drive during a local installation if an \MB7 folder exists on a network drive.

Note fields in reports and exporting to Excel

When exported to Excel, the query will not display the field immediately after the line notes field "rdrpln.ntetxt." When editing the report form, place the line notes field at the end of the query.

About network configuration and TCP Remoting Channel

Sage Master Builder uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. Certain configurations can potentially disable the communication:

- File sharing on computers running the Windows 7, Vista, Server 2008, and Server 2008 R2 operating system must be enabled. To enable file sharing, follow the instructions in the Windows 7/Vista/Server 2008 Help.
- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.
- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

Configuring Sage Master Builder Hosting Framework TCP port number

By default, Sage Master Builder uses the TCP starting port number 48750. This number can be configured using an XML file, Sage.CRE.HostingFramework.Service-InstanceConfig.xml, located under: \MB7\Programs



CAUTION: If you need to change the default port numbers for the Sage Master Builder Hosting Framework using the Sage.CRE.HostingFramework.Service-InstanceConfig.xml file, you must change it on every computer on the network where Sage Master Builder is installed. In addition, after making this change, the Sage Master Builder Hosting Framework on each computer running Sage Master Builder must be restarted.



NOTE: Consult with your IT administrator for alternative port numbers.

To change the port numbers:

- 1 In Window Explorer, locate the Sage.CRE.HostingFramework.Service-InstanceConfig.xml under this path:
 \MB7\Programs
- 2 Right-click Sage.CRE.HostingFramework.Service-InstanceConfig.xml, and open it with a text editor, such as Notepad.
- 3 Near the end of the file between the **<StartingPort>** **</StartingPort>** tags, locate the port number and change it.
- 4 Save and close the file.
- 5 Repeat steps 1-4 on every computer running Sage Master Builder.

Sage licensing (Sage Master Builder Hosting Framework) cannot auto-start on Windows 7 Professional, Vista, Server 2008, or Server 2008 R2 Standard

The Sage licensing service (Sage Master Builder Hosting Framework) cannot auto-start on computers running the Windows 7 Professional, Vista Business, Server 2008, or Server 2008 R2 Standard operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Vista, Windows 7, and Server 2008, or Server 2008 R2 installation and mapped drives

Mapped drives may not be available when installing on a computer running the Vista, Windows 7, or Server 2008 operating systems. See the Microsoft knowledgebase article about allowing mapped drives to display elevated users:

<http://support.microsoft.com/kb/937624/>



NOTE: If you need to install to a mapped drive, install the program to a computer that is running another supported operating system, such as Windows XP.

Configuring third-party firewalls

During installation of the Sage Master Builder Hosting Framework, the Windows Firewall is configured automatically to allow the Sage Master Builder Hosting Framework to act as a TCP server. If you use some other firewall, however, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following basic procedure to manually configure the Windows Firewall to allow the Sage Master Builder Hosting Framework to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

- 1 Click **Start > Control Panel > Security Center** (XP) or **Security** (Vista/Server 2008) or **System and Security** (Windows 7).
- 2 Open **Windows Firewall**, and select the **Exceptions** tab (XP) or **Allow a program or feature through Windows Firewall** (Vista, Windows 7, and Server 2008).
- 3 If Sage Service Host is not on the list, then you can add it by selecting **Add Program**, then browsing to the following path:
\\MB7\Programs\Sage.CRE.HostingFramework.Service-InstanceConfig.xml.



NOTE: By default, the exception is set to allow access by any computer on the network. If desired, you can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Help > About Sage Master Builder

“Sage Master Builder Standard” has been removed from the **Help > About Sage Master Builder** window to avoid confusion with other Sage products.

Read this information if you use ClearType smooth fonts

If your screen display properties are set for using ClearType smooth fonts, text on any Sage Master Builder window may appear to be smudged or blurry. If this condition exists, use the following instructions to change the setting.

- 1 Right-click the **Desktop**, and select **Properties**.
- 2 On the Display Properties window, click the **Appearance** tab, and then click **[Effects...]**.
- 3 On the Effects window, clear the check box, **Use the following method to smooth edges of screen fonts**.
- 4 Click **[OK]**, and then click **[Apply]** and then **[OK]** again. You may have to minimize then maximize Sage Master Builder for the changes to take effect.

PCI DSS Compliance

PCI DSS stands for Payment Card Industry Data Security Standard. It was developed by the major credit card companies as a guideline to help organizations that process card payments to prevent credit card fraud, cracking, and various other security vulnerabilities and threats. A company processing, storing, or transmitting payment card data must be PCI DSS-compliant or risk losing its ability to process credit card payments and being audited and/or fined.

Sage Master Builder does not currently process credit card payments; however, two Sage Master Builder windows provide data entry fields for credit card numbers and related information:

- **3-6 Receivable Clients, Payment Information** tab, under **Credit Card Information**
- **11-2 Work Orders/Invoices/Credits, Invoice Details** tab, **Card/Check#** field.

In addition, you may have created user-defined fields to store credit card numbers.

To avoid any non-compliance with PCI DSS, we recommend against storing credit card information in Sage Master Builder. Such storage does not comply with the PCI DSS, and it creates a possible risk for your business.

For more information about PCI DSS standards, click the following link:

<https://www.pcisecuritystandards.org/>

Locating tax updates

Tax updates are released throughout the year. To get the latest information about tax updates, log on to the Customer Portal, www.sagecre.com/customerlogon.

Then click **Support > Documents > For Customers > Sage Master Builder > Release Materials**.

Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage Master Builder to run as administrator for scheduling reports



IMPORTANT: On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage Master Builder reports requires that you to “run as administrator” or to “run the program as administrator.”

Microsoft Windows has changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage Master Builder as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule. To save a report schedule, you must launch Sage Master Builder with the command to either Run as administrator or Run this program as an administrator.

When you select either command, the settings are limited to you personally. Your settings to run Sage Master Builder as administrator do not affect the next person who logs on and launches Sage Master Builder from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you run the program as administrator for that session only. When you select Run this program as an administrator, you set program properties to always run the program as administrator when you log on to this computer.



NOTE: "Run as administrator" and "Run this program as an administrator" are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set "Run as administrator":

- 1 On your Windows desktop, right-click the Sage Master Builder program icon.
- 2 From the drop-down menu, to launch the program, click **[Run as administrator]**.



NOTE: Selecting **Run as administrator** only runs the current session of running Sage Master Builder. The setting does not persist after the session is over.

To set "Run this program as an administrator":

- 1 On your Windows desktop, right-click the Sage Master Builder program icon.
- 2 From the drop-down menu, click **[Properties]**.
- 3 On the Sage Master Builder Properties window, click the **[Compatibility]** tab.
- 4 Under Privileges Level, select **Run this program as an administrator**.
- 5 Click **[Apply]**, and then click **[OK]**.



NOTE: Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Windows 7 Professional and Server 2008 R2 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 7 Professional or Server 2008 R2 Standard operating system is used as a license server, when it goes into sleep mode other computers on the network can't obtain a license.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never:"

1. **Start > Control Panel > System and Security > Power Options.**
2. Select **Change when computer sleeps.**
3. From the **Put computer to sleep** list, select **Never**.

Solution for Server 2008 R2 "Permission Error Opening File"

If you see an permission error message when launching Sage Master Builder on a computer running the Windows Server 2008 R2 operating system, follow these instructions:

- 1 On the Window desktop, right-click **Start**, and then click **Open Windows Explorer**.
- 2 On the left side of the window, under **Computer > Local Disk**, right-click the \MB7 folder, and then select Properties.
- 3 On the **MB7 Properties** window, click the **Security** tab.
- 4 From the list under **Group or User Names**, select **USERS**, and then click the **Edit** button.
- 5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.
- 6 Selecting **Full control** selects all the check boxes necessary for this solution.
- 7 On the **Permissions** window, click **OK**, and then on the **MB7 Properties** window, click **[OK]**.

Windows Server 2008 R2 and Microsoft .NET 3.5.1

Microsoft .NET 3.5.1 must be available and enabled prior to installing Sage Master Builder version 17.101 on a Windows Server 2008 R2 machine. Server 2008 R2 comes with .NET 3.5.1 loaded but not installed, so Sage Master Builder doesn't install it automatically.

If you attempt to install Sage Master Builder 17.101 without .NET 3.5.1 installed, you will receive the following message during the licensing install: "Sage.CRE.HostingFramework.Service v3.2 has stopped working." When you click **[OK]**, the installation continues, but the services have not been installed so Sage Master Builder cannot open. The Sage.CRE.HostingFramework Service will not install unless .NET 3.5.1 has been installed. If you receive the above message during the installation of 17.101, install .NET Framework 3.5.1 and reinstall Sage Master Builder.

To verify that .NET 3.5.1 is installed on Windows Server 2008 R2:

- 1 Click the **Start** button in the lower left hand corner of the display.
- 2 Highlight **Administrative Tools** and select **Server Manager**.
- 3 In the **Server Manager** interface, click **Features** to display all the installed Features in the right-hand pane. Verify that .NET Framework 3.5.1 is listed.

To enable .NET 3.5.1 on Windows Server 2008 R2:

- 1 In the **Server Manager** interface, select **Add Features** to display a list of possible features.
- 2 In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.
- 3 Once you expand **.NET Framework 3.5.1 Features**, you will see two check boxes. Check the box next to **.NET Framework 3.5.1** and click **Next**.
- 4 In the **Confirm Installation Selections** interface, review the selections and then click **Install**.
- 5 Allow the installation process to complete and then click **Close**.



NOTE: Enabling .NET Framework 3.5.1 may require a reboot.

Windows Vista and Server 2008 Operating Systems

Solution for Server 2008 "Permission Error Opening File"

If you see a permission error message when launching Sage Master Builder on a computer running the Windows Server 2008 operating system, follow these instructions:

- 1 On the Windows desktop, right-click **Start**, and then click **Explore**.
- 2 On the left side of the window, under **Folders**, right-click the **MB7** folder, and then select **Properties**.
- 3 On the **MB7 Properties** window, click the **Security** tab.
- 4 From the list under **Group or User Names**, select **USERS**, then click the **Edit** button.
- 5 On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box. Selecting **Full control** selects all the check boxes necessary for this solution.
- 6 On the **Permissions** window, click **[OK]**, and then on the **MB7 Properties** window, click **[OK]**.

Vista and Server 2008 "Sleep Mode" prevents computers from obtaining a license use

If you are using a Vista or Server 2008 computer as the Sage license server and it goes into **Sleep Mode**, the workstations cannot obtain a license use.

Use a different computer on your network to be the Sage license server. Any supported operating system can be used in place of Vista or Server 2008, for example, Windows XP.

Set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to Never:

- 1 **Start > Control Panel > System and Maintenance > Power Options**.
- 2 Select **Change when computer sleeps**.
- 3 From the **Put computer to sleep** list, select **Never**.

Vista, Windows 7, and Server 2008 and changing the Sage License Server computer

On a Vista, Windows 7, or Server 2008 workstation, when you select **File > Change Sage License Server > Select the computer from the list of computers on your network**, the command may fail to generate a list of network computer

names. To resolve this issue, click **Enter the IP address or name of the computer**, and then type the IP Address of the server computer in the box.

Possible conflict when running scheduled reports on Vista Business 64-bit operating system

On computers running the Vista Business operating system, the Sage Master Builder report scheduler may encounter a conflict with the Microsoft print spooler (splwow.exe) and may not function as expected.

A solution for avoiding this possible conflict would be to schedule reports on computers running a 32-bit operating system or on computers running the XP 64-bit operating system.

Reports

Earlier versions of reports and form designs created or saved in Version 14 or later

Due to the technology changes in Version 14 and later:

- Version 13 and earlier reports and form designs that have been edited or saved in Version 14 or later will no longer work in Version 13 or earlier releases if copied back to Version 13 or earlier releases.
- Reports and form designs created in Version 14 or later will not work in Version 13 or earlier releases.

Custom Reports

SQL query (calculated fields) formatting issues

The Sage Master Builder program code was upgraded from Visual Basic to .NET C# in Version 14. The CodeBase engine has also been upgraded to .NET.

The Visual Basic CodeBase engine in Version 13 and earlier was very forgiving when handling improperly formatted SQL queries and would often execute these reports; however, the results of these queries may have been different than expected. The .NET Codebase version strictly enforces proper SQL formatting and will not execute reports with improperly formatted SQL queries.

To help resolve this issue in v14.2, the development team added validation to check the SQL formatting when saving or executing custom reports. If the CodeBase engine cannot interpret the SQL query, the program displays a message telling customers the name of the calculated field so that they can open the report writer and locate the problem and correct.

Font issues

Sage Master Builder uses Arial font as the default font for the reports and form designs that are delivered with the program.

Sage Master Builder itself does not limit the fonts used on custom reports except that they must be TrueType® fonts. If the font is installed on the system, Sage Master Builder attempts to use it. In testing, however, the development team discovered that the .NET environment is much more restrictive with fonts and the font properties (for example, bold, italic) than is the Visual Basic environment.

In the Visual Basic environment of Version 13 and earlier, if a font did not exist on the system, the program located and substituted another font. If the specific font was installed on the system but the font properties were not supported, the system would also substitute another font. The .NET environment of Version 14 does not locate and substitute another font or font properties, but rather displays an error message.

In Version 14, the development team added validation to the program code to recognize this issue and display a message so that customers can correct the font in the report as necessary.

The program attempts to substitute the font using Arial to allow the user to execute the given report after the message has been cleared.

Slight changes to field locations on reports can cause sizing issues

The migration from a Visual Basic environment to a .NET environment required the development team to measure report formatting with pixels rather than twips. Because of this change, a few data-field locations had to be adjusted slightly on some reports. Most of the reports still work as expected without any data-field location adjustments. If you encounter this formatting issue on any of your custom reports, open the report in Report Writer and adjust the field locations as necessary.

Note field issues related to their placement on their own line in custom reports

When note fields are included with other fields on the same report line, they may or may not work as expected. For many years, Sage Master Builder reports have required that Note fields be placed on their own individual report line to ensure that they would word wrap and paginate properly. All installed Sage Master Builder reports were designed to meet this requirement.


These steps provide the best solution to this problem in a custom report:

- 1 Move the note field to its own line directly under the line that the notes are related to on the report.
- 2 Set the properties of this field to **Do not print the line if the value returned for this field is zero/blank**.
- 3 Set the number of characters to **32767**, and then set the format to **Auto**.

Faxing and Adobe Reader

Use Adobe Reader Version 8.1.3 or later for faxing

Customers have reported problems faxing from Sage Master Builder with versions of Adobe Reader earlier than 8.1.3. Note that Adobe Reader Version 8.1.3 and later support faxing from Windows and from Sage Master Builder.

 **IMPORTANT:** To fax from Sage Master Builder, the Windows Fax Service component must be installed with your Windows operating system. For more information about installing the Windows Fax Service component, see the Sage Master Builder Help topic, "Installing the Windows Fax Service component."