Sage 100 Contractor 2016
(formerly Sage Master Builder)

Release Notes - Controlled Release

Canadian and United States Editions

Version 20.1

Contents

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April 2016 Update (Build 20.1.789)

We have incorporated the following changes in build 20.1.789 for Controlled Release.

Enhancements in this Update

- You can now restore a company from a backup without overwriting the existing company. (You might do this, for example, to review data from backups while leaving your current company intact.)

  In Database Administration, on the Restore Company from Backup page, select the backup file you want to restore, as usual. In the **Restore As** box, type the new name to give to the restored company, and then click the **Restore Company** button.

- In Lookup windows throughout the program, you can now view the names associated with columns that display certain numbered records, for example, the vendor names for vendor numbers, job names for job numbers, account names for account numbers, and so on.

- You can now change the size of query windows.

Fixes for Both Editions

- In the **1-5 Bank Reconciliation** window, recurring transactions now appear consistently under Adjustments.

- You can now display all columns in the **5-3-1 Payroll Calculations** display lookup window.

- When you email a report using Microsoft Outlook, the file name of the attached report now includes the PDF extension.

- In reports and queries, if you use the "Less" or "Less or =" operator with criteria for date fields (for example, "Less" and the value "01/01/2015"), the report or query includes records that have empty date values.

- When searching for a record using the F4 lookup key, you can restrict the results to records that contain specific characters in the description by typing an asterisk (*) at the beginning of the search string. For example, if you type "*wire" for a part, and then press F4, the resulting list includes all parts that contain "wire" anywhere in the description.

- In the **9-5 Takeoffs** window, you can now export POs for a job that has a default department, even when one of the vendors has no default account number, and the previous vendor has a default account that uses departments.

- In Database Administration, you can now save scheduled maintenance tasks even if Sage 100 Contractor is not installed on the server.

- In the **1-7 General Ledger Accounts** window, editing the name of a subaccount no longer updates that field on all subaccounts that have the same subaccount number.

March 2016 Update (Build 20.1.780)

We have incorporated the following changes in build 20.1.780 for Controlled Release.

Fixes for Both Editions

- Reports that you email using the email icon no longer repeat the PDF extension (for example, "Report.PDF.PDF").

- Program alerts work as expected when triggered and no longer generate an error message.

- When you include the **Notes** field in form designs, notes that need to wrap no longer run slightly over the right side of the page.

- Changing menu security settings for one menu no longer affects other menus.

- You are no longer prevented from performing actions that your user groups permit, such as saving records or changing the posting period.

- In the **1-1 Checks/Bank Charges** window, when you save a manual check with a 0 (zero) for the check number, Sage 100 Contractor continues to run properly, and you no longer receive an error message.

- In the **3-10-2 Compute T&M Invoices**, when you use a cost codes pick list to compute invoices, only job cost records that are allocated to the specified cost code are included in the computation.

- When you post a payroll record that includes overtime pay allocated to a job, the journal entry no longer distributes some of the employer-paid Social Security or Employment Insurance tax to overhead expense.

Fixes for the U.S. Edition

The following issue was fixed specifically for the U.S. Edition of Sage 100 Contractor:

- When you print certified **5-1-6 Department of Labor** reports, you no longer receive an error message saying that the index was outside the bounds of the array.

March 2016 Update (Build 20.1.771)

We have incorporated the following changes in build 20.1.771 for Controlled Release.

Fixes for Both Editions

- You no longer receive incorrect notifications that scheduled backup was not performed the previous night when the scheduled backup ran as expected.

- In the **4-7-5 - Reconcile Credit Card Statements** window, you can now reconcile charges and payments that were recorded, but not reconciled, in a year that you have archived.

- In the **5-2-1 Employees** window, the [**Licenses**] and [**Training**] buttons are available, as expected.

- The **9-5 Takeoffs** window now "remembers" changes made to Overhead/Profit rates in a takeoff record the next time the window is opened.

- If two users enter work orders concurrently in the 11-2 Service Receivables window, the work order numbers are unique even when job security is turned on.

- The profit (loss) figure reported on **Balance Sheet** reports is now correct in version 20.1 (matching the figure in version 19.7), even when you advance the year before migrating data from version 19.7.

Fixes for the U.S. Edition

The following issue was fixed specifically for the U.S. Edition of Sage 100 Contractor:

- The **5-1-6-21 Certified Payroll** report now reports benefits for the 19-Per Hour (worked hours) calculation method.

January 2016 Update (Build 20.1.753)

We have incorporated the following changes in build 20.1.753 for Controlled Release.

Enhancements in this Update

Update ACA settings for all employees at once

Sage 100 Contractor provides a very effective way to update ACA settings at the beginning of a new calendar year or any time you need to change these settings for all employees.

Use the new **Update All Employee ACA Settings** window to update ACA settings in all your employee records from a single point in the program, rather than changing the settings for each employee individually.

NOTE: When changing ACA settings using this window, you update each setting independently (except for the 1A Offer of Coverage Codeas noted in step 4).

To change ACA settings for all employees at once:

1. Open the **5-2-1 Employees** window.

2. Click **Options** > **Update All Employee ACA Settings**.

3. In the **Update All Employee ACA Settings** window that opens, specify the month and the year as of which the new settings will be effective.

4. Change the **Existing value** and **Change to** boxes for the following settings, as needed:

   - **Offer of Coverage Code**. You cannot change this code to a blank. If you offered no coverage, select 1H as the code.

     NOTE: If you change the Offer of Coverage Code to 1A, 1F, 1G, 1H, or 1I, the program changes the Share of Min Plan Premium to zero for all employees that are assigned to this code.

     TIP: To clear any existing non-zero premiums you may have entered for employees assigned to codes 1A, 1F, 1G, 1H, or 1I, enter the same code in the **Existing value** and **Change to** boxes. For example, if you enter 1A in both boxes, when you click Update, the program clears the Share of Min Plan Premium for all employees assigned to the 1A Offer of Coverage Code.

   - **Safe Harbor Code**.

   - **Share of Min Plan Premium**.

     NOTE: The Share of Min Plan Premium amount must be zero if the Offer of Coverage Code is 1A, 1F, 1G, 1H, or 1I.

     TIP: You can clear all existing premium amounts by entering zero in the **Change to** box.

5. For each setting you changed, click the [**Update**] button.

View current ACA Settings for all employees

To display current ACA settings for all employees:

1. In the **Update All Employee's ACA Settings** window, specify an **Effective Beginning** month and year.

2. Click the [**View**] button.

   The ACA Settings window opens, listing ACA settings for all employees in a grid.

You can use the ACA Settings window to check the existing settings before you make any changes.

After changing ACA settings, use the ACA Settings window to verify your changes. If you need make additional adjustments for an individual employee, select the employee on the grid, and then click the [**Drill Down**] button. The employee record opens, where you can change the settings as needed.

Enhancements in this Update

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Sage 100 Contractor provides a very effective way to update ACA settings at the beginning of a new calendar year or any time you need to change these settings for all employees.

Use the new **Update All Employee ACA Settings** window to update ACA settings in all your employee records from a single point in the program, rather than changing the settings for each employee individually.

NOTE: When changing ACA settings using this window, you update each setting independently (except for the 1A Offer of Coverage Codeas noted in step 4).

To change ACA settings for all employees at once:

1. Open the **5-2-1 Employees** window.

2. Click **Options** > **Update All Employee ACA Settings**.

3. In the **Update All Employee ACA Settings** window that opens, specify the month and the year as of which the new settings will be effective.

4. Change the **Existing value** and **Change to** boxes for the following settings, as needed:

   - **Offer of Coverage Code**. You cannot change this code to a blank. If you offered no coverage, select 1H as the code.

     NOTE: If you change the Offer of Coverage Code to 1A, 1F, 1G, 1H, or 1I, the program changes the Share of Min Plan Premium to zero for all employees that are assigned to this code.

     TIP: To clear any existing non-zero premiums you may have entered for employees assigned to codes 1A, 1F, 1G, 1H, or 1I, enter the same code in the **Existing value** and **Change to** boxes. For example, if you enter 1A in both boxes, when you click Update, the program clears the Share of Min Plan Premium for all employees assigned to the 1A Offer of Coverage Code.

   - **Safe Harbor Code**.

- **Share of Min Plan Premium**.

   NOTE: The Share of Min Plan Premium amount must be zero if the Offer of Coverage Code is 1A, 1F, 1G, 1H, or 1I.

   TIP: You can clear all existing premium amounts by entering zero in the **Change to** box.

5. For each setting you changed, click the [**Update**] button.

View current ACA Settings for all employees

To display current ACA settings for all employees:

1. In the **Update All Employee's ACA Settings** window, specify an **Effective Beginning** month and year.

2. Click the [**View**] button.

    The ACA Settings window opens, listing ACA settings for all employees in a grid.

You can use the ACA Settings window to check the existing settings before you make any changes.

After changing ACA settings, use the ACA Settings window to verify your changes. If you need make additional adjustments for an individual employee, select the employee on the grid, and then click the [**Drill Down**] button. The employee record opens, where you can change the settings as needed.

Fixes

We have fixed the following issues in this product update:

Fixes for Both Editions

- As of build 753, you can control when spell checking for notes occurs. In the 9-5 Takeoffs window, for example, the Options menu now includes *two* choices that control when spell checks occur:

  - **Spell Check on Save.** When you select this option, spelling is checked only when you save a note. Select this option alone if you find that the system is slow when you are typing notes.

  - **Spell Check while Typing.** This option is new. When you select it, spelling is checked continuously as you are typing. If you find that the system is lagging as you type longer notes, you should clear this option.

- Before you can print the **1-7-21 General Ledger Account Record**, you must now enter the calendar year for the report.

- Checks that you edit in the **1-1- Checks and Bank Charges** window now appear correctly in the **4-1-5-21 Vendor Payments**, **4-1-5-31 Vendor Workers Comp** and **4-1-5-61 Vendor 1099** reports.

- Credit card charges are now displayed correctly by transaction and subaccount in the **4-7-5 Reconcile Credit Card Statements** window.

- Payroll record reports **5-2-2-26** and **5-2-2-36** no longer repeat the payroll calculation for every time card line included on the report.

Fixes for the U.S. Edition

The following issue was fixed specifically for the U.S. Edition of Sage 100 Contractor:

- In the **5-3-2 Workers' Compensation** window, you can now enter a maximum wage for any state. To set maximum wage for states other than Ohio, New York, and Nevada, the payroll calculation must use the **4-Wages/Year** Max Type.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- Amounts in boxes 14, 24 and 26 on T4 Slips are now correctly reported for employees who have been paid a non-taxable per diem.

- In the **4-6 Recurring Payables** and the **4-7-3 Enter Credit Card Receipts** windows, if you change the price of an item while entering a detail line, the program now updates tax amounts accordingly.

January 2016 Update (Build 20.1.742)

This section describes tax changes included in this January update. It also includes program fixes implemented since the year-end update released in December 2015.

U.S. Payroll Tax Tables—January 2016 Update

NOTE: Some of these changes were implemented in the year-end update, released in December 2015. They are shown here for the convenience of customers who skipped that update.

Federal Payroll Tax Changes

The federal government mandated the following payroll tax changes for 2016:

- The annual personal exemption increased to $4,050 for 2016.
- The Percentage Method tax tables changed.

Other Government-Mandated Payroll Tax Changes

Payroll tax tables were changed for 2016 for the following jurisdictions:

- California
- Connecticut
- District of Columbia (new in January)
- Illinois
- Kentucky
- Maine
- Maryland Local Tax (new in January)
- Massachusetts (new in January)
- Minnesota
- Missouri (new in January)
- New Mexico
- New York and Yonkers
- North Carolina (new in January)
- North Dakota (new in January)
- Oklahoma
- Oregon (new in January)
- Rhode Island (new in January)
- Vermont (new in January)

Fixes

We have fixed the following issues in this product update:

Fixes for Both Editions

- Lookup screens no longer display encrypted fields.

- Notes that include carriage returns are now formatted properly when you save them, regardless of the spell check setting.

- An issue in the December year-end release prevented you from completing the payroll archive process. This issue is now resolved.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- In the **4-2 Payable Invoices/Credits** window, when you change the quantity, price or holdback on any invoice lines that include GST, PST, or HST and the invoice has no PO or subcontract, a message asks whether to recalculate sales tax automatically. If you click **Yes**, the program calculates tax for the row or rows.

- Clicking the Contact Us link now displays the contact web page with Canadian English as the default language.

December 2015 Year-End Update

This section describes tax changes included in the version 20.1 year-end update, as well as program fixes and enhancements introduced since build 716, the first build released to all groups participating in the Sage 100 Contractor 2016 Controlled Release.

U.S. Payroll Tax Tables—December 2015 Release

Federal Payroll Tax Changes

The federal government mandated the following payroll tax changes for 2016:

- The annual personal exemption increased to $4,050 for 2016.
- The Percentage Method tax tables changed.

Other Government-Mandated Payroll Tax Changes

Payroll tax tables changed for the following jurisdictions:

- California
- Connecticut
- Illinois
- Kentucky
- Maine
- Minnesota
- New Mexico
- New York and Yonkers
- Oklahoma
- Rhode Island

Canadian Payroll Tax Tables—December 2015 Release

This section highlights federal, provincial, and Quebec tax changes.

For more information about these changes, and for information on Employment Insurance, see the Canada Revenue Agency website.

Federal Payroll Tax Changes

Changes to Canadian payroll taxes include the following :

- Income tax thresholds and personal amounts are indexed for 2016.
- EI maximum annual insurable earnings and the EI premium rate changed.
- CPP maximum pensionable earnings and the basic exemption changed for 2016. The maximum contribution amount also changed.

Quebec Payroll Tax Changes

Changes to Quebec payroll taxes for 2016 include the following:

- The QPP maximum contribution amount and contribution rate changed.

Other Provincial and Territorial Payroll Tax Changes

The following provinces and territories mandated payroll tax changes, effective January 1, 2016:

- Alberta
- British Columbia
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Saskatchewan
- Yukon

For detailed information on personal amounts, see the TD1 form for each province or territory.

Fixes—Version 20.1 December 2015 Update

We have fixed the following issues in the December 2015 product update for Sage 100 Contractor (Controlled Release) Version 20.1:

Fixes for Both Editions

- You can enter a negative invoice with a use tax in the **4-2 Payable Invoices/Credits** window. Sage 100 Contractor no longer displays an error message when you click the [**Use Tax**] button.

- If you do not use Document Control, Job Document menu items are no longer listed on the **Projects** tab in the **Activity Centre**.

Fixes for the U.S. Edition

The following issues were fixed specifically for the U.S. Edition of Sage 100 Contractor:

- Certified payroll reports now appear only in the **5-1-11 Certified Payroll Forms** window, not in the **5-4-2 State Forms** window.

- In the **5-1-11 Certified Payroll Forms** window, you can now print reports for all jobs marked for certified reporting that have a status of **3 - Contract** or **4 - Current**, even if no payroll has been recorded for them.

Fixes for the Canadian Edition

The following issue was fixed specifically for the Canadian edition:

- In the **5-3-1 Payroll Calculation** window, you can select a Benefit code for union and other reports even if the **Calculation Type** is set to 1-Deduct from Employee and the **Tax Type** is set to 0-None.

Enhancements

General Improvements

This update includes the following enhancements for both the U.S. and Canada editions:

- A new calculation method, **19 - Per Hour (worked hours)** is available in the 5-3-1 Payroll Calculations window. Payroll computed for this code (in the **5-2-3 Compute Payroll** window) is based on Regular, Overtime, Premium, and Piece Pay hours.

- The help topic "Calculation Methods, Tax Types, and Calculation Types" has been corrected. It now states that payroll computed for the **Per Hour (all hours)** calculation method includes all types of hours, both worked (Regular, Overtime, Premium, and Piece Pay) as well as non-worked hours (Sick, Vacation and Holiday).

Enhancements for the U.S. Edition

Changes to support federal electronic reporting requirements

New federal regulations in the United States require that you indicate the employee's consent when transmitting 1094/1095 (B and C) and W-2 forms electronically, and vendor consent when you transmit vendor 1099 forms electronically.

In addition, when submitting 1094-B or 1095-B reports, you must provide one of the following ACA Policy Origin Codes:

- Unassigned
- A - Small Business Options Program
- B - Employer-sponsored coverage
- C - Government-sponsored program
- D - Individual market insurance
- E - Multi-employer plan
- F - Misc. min. essential coverage

Sage 100 Contractor provides the following new options to help you to meet these requirements:

- To indicate employee consent to transmit W-2 information, you select a new **Consent for Electronic W-2** check box on the **Compensation** tab in employee records.
- To indicate employee consent to transmit ACA information, you select a new **Consent for Electronic ACA** check box on the **ACA** tab in employee records.
- To indicate vendor consent, you select a new **Aatrix Electronic Consent** check box and provide a recipient email address on the **Financial Information** tab in vendor records.
- You select an **ACA Policy Origin Code** for your company using the new option on the **General Information** tab of the **7-2 Company Information** window.

Your selections for these options are used when you submit Transmittal B forms and consent forms electronically.

Submitting new consent forms electronically

You use the following new reports in the **5-4-1 Federal Tax Forms and EFiling by Aatrix** window to send consent for W-2, 1095 C, and 1099 forms electronically:

- 2015 1095/1094-C
- 2015 1095/1094-B
- Electronic 1095 Consent
- Electronic W2 Consent

You use the new Electronic 1099 Consent report in the **4-5 Vendor 1099 Forms and EFiling by Aatrix** window to send consent for vendor 1099 forms.

Enhanced ACA Reports

Version 19.7 includes a new report, **5-4-3-31 ACA Employee Count Reconciliation**, to help you reconcile your 1094/1095-C ACA forms to your payroll records. This report includes a count of all employees who worked 130 hours or more each month, including exempt employees.

We have renamed the **5-4-3 ACA Hours Allocation** report to **5-4-3-21 ACA Full Time Equivalent Count** report, which reflects the basis of the report and helps to distinguish it from the new report. (This report does not include exempt employees.)

You can now find both reports under the new menu item **5-4-3 ACA Reports**.

Changes for the California Paid Sick Leave Act

As of July 1, 2015, employees working in California for 30 days or more for the same employer are entitled to receive paid sick leave, accrued at the rate of one hour for every 30 hours worked.

We have updated the following windows and reports in Sage 100 Contractor to accommodate this change for California and other jurisdictions where you are required to accrue paid sick leave for employees:

- **5-2-1 Employees.** You use the existing Accrued Sick, Accrual Rate, and Accrual Method fields on the Compensation tab to calculate accrued sick time.

  You use two new fields to restrict the sick leave accrual to a maximum amount and to carry forward the previous year's balance:

  - In the **Accrual Max** box, enter the maximum amount of paid sick leave that the employee can accrue. (This is normally the legal maximum for the state, such as 6 days or 48 hours.)

    This maximum is used during the computation of payroll to determine whether sick leave must be accrued .

  - You can change the amount displayed in the **Last Year Carry Forward** box, if necessary. At the beginning of a new payroll year, Sage 100 Contractor brings forward the employee's Accrued Sick balance from the previous year and displays the amount in this box.

    This amount is reported on the Sick Leave Verification Report as the accrued sick balance from the previous year.

- **5-2-2 Payroll Record** and **5-2-3 Compute Payroll.** Sick leave accrual is calculated for each payroll record when payroll is computed.

- **5-1-8-81 Sick Hours Earned and Used report.** This new report shows how many paid sick days each employee earned and how many they used for each pay period, as required under the new California legislation. It also shows a running balance for each employee at the end of each pay period, and includes the amount carried forward from the previous year.

Filter for unneeded payroll calculations in the Aatrix W-2 preparer grid

By default, Sage 100 Contractor sends all payroll calculations to the W-2 preparer grid when you generate W-2 forms. If your company uses a large variety of payroll calculations, it can be very inconvenient to have to

scroll through columns for calculations that are not required for W-2 preparation.

Now, you can filter unnecessary payroll calculations, so that only calculations required for W-2 forms appear in the grid. When you turn on this feature, the following payroll calculations are not sent to the W-2 preparer grid if the W-2 box is blank:

- Employer SUI, Liability, or Advance Deduction
- Employer Workers Comp
- Employer SDI
- Tax Type 0-None, if one of the following conditions is also true:
  - Employer Cost and all Subject To boxes *are not selected*
  - Deduct from Employee and all Subject To boxes *are selected*

NOTE: Sage 100 Contractor creates a **SkippedPayrollCalcsForW2s.log** file in the C:\Program Data\Sage\Sage 100 Contractor folder that lists all the skipped calculations.

To activate the filter in the W-2 preparer grid:

1. Create a blank text file with the exact name **SkipPayrollCalcsForW2s.config**.
2. Save the file to the **C:\Program Data\Sage\Sage 100 Contractor** folder.

Enhancements in version 20.1

Sage is excited to introduce Sage 100 Contractor2016 (Version 20.1), which is built on the powerful and secure Microsoft SQL Server database platform.

This section describes the new features and enhancements you will find in version 20.1.

New Microsoft SQL Server Platform

Although Sage 100 Contractor 2016 has the same look, feel, and functionality that you are familiar with, its new SQL database structure affords much tighter security and an up-to-date technology on which to build future releases. It also provides several other notable enhancements, including:

- **A new, separate Database Administration tool.** You don't have to be an expert user of Microsoft SQL Server to take advantage of its robust features! We designed Database Administration to optimize your data for Sage 100 Contractor, for example, by keeping related data in expected locations and creating backups automatically before performing certain critical processes. Many of its features are not available through SQL Server Management Studio.

  Significantly, Database Administration includes a migration utility that we have designed and tested extensively to help ensure a smooth and painless transition to SQL Server.

  We have relocated many administrative utilities and functions from the main Sage 100 Contractor program to this new tool. However, we have boosted their capabilities considerably, and now provide easily scheduled maintenance and backup functions to help you to keep your Sage 100 Contractor companies in good order.

  In addition, Database Administration offers several powerful, new capabilities that enable you to maintain tight security and exert fine control over user and program access to your SQL Server instance.

  For a comprehensive list of the utilities you will find in Database Administration, see "Database Administration for Sage 100 Contractor", later in this document.

  NOTE: Database Administration comes with its own help system and a new *Database and Company Administration Guide* to acquaint you with its features and to guide you in its use.

● **New views for creating reports with third-party report writers.** Because the new views point to the database tables, rather than pointing your reports directly to the tables, we encourage you to use them when creating custom reports using third-party tools, such as Crystal Reports.

For example, in earlier versions, you would point directly to actpay.vndnme to include Accounts Payable vendor names in custom reports. In the version 20.1 company database, this information resides in dbo.actpay.vndnme. However, we recommend that rather than pointing directly to the table name, you point to the field in the new view: Reports_v1.actpay.vndnme. Report views are located in the Views folder in your company database.
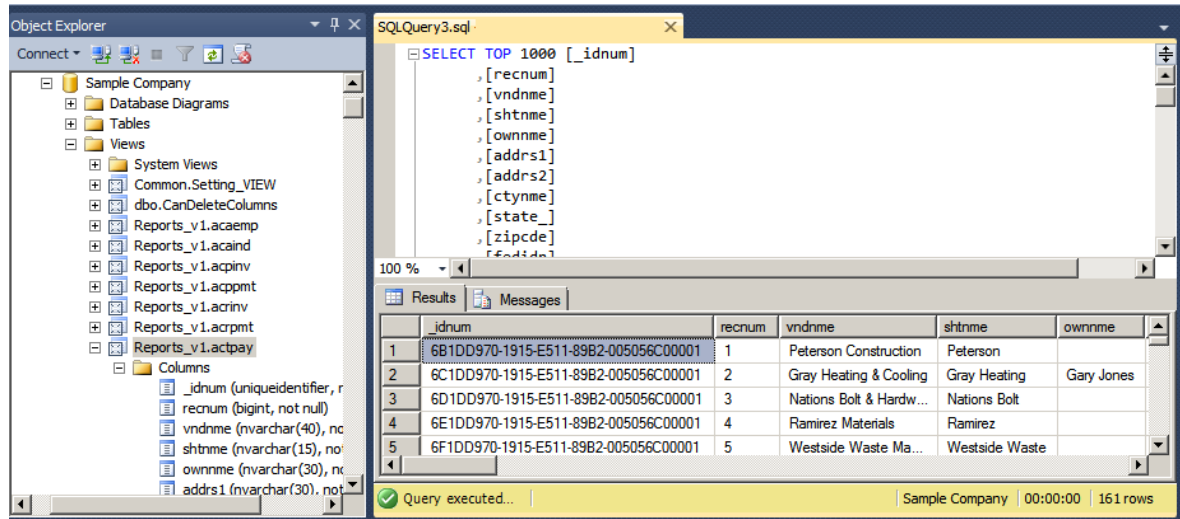
TIP: A compelling reason to use these views is that they may not be affected by many types of changes to the underlying tables, so future database changes will not necessarily "break" your custom reports.

Software and hardware required to support Microsoft SQL Server

Version 20.1 requires an instance of Microsoft SQL Server. You can download and use Microsoft SQL Express at no charge, or you can use the full version of Microsoft SQL Server. You can even start using Microsoft SQL Express, and upgrade to the full version of Microsoft SQL Server later, if necessary.

When you first open the new Database Administration tool, the program tries to configure an instance of Microsoft SQL Server with optimal settings for Sage 100 Contractor for you. If you do not already have an instance of Microsoft SQL Server, you can let the Database Administration tool download, install, and configure Microsoft SQL Express for you.

Refer to Knowledgebase article 67758 for detailed information about supported operating systems and software, and for minimum hardware requirements.

Database Administration for Sage 100 Contractor

The new Database Administration tool is intended for designated system administrators and company administrators. You use it to set up and maintain your company databases, and to select advanced settings to manage communications with and access to your Microsoft SQL Server instance from other programs.

If you have used earlier versions of Sage 100 Contractor, several of these tasks will be familiar to you. For example, Database Administration includes utilities for creating and deleting a company, backing up and restoring company files, and archiving company data that you used in previous Sage 100 Contractor versions.

IMPORTANT: We highly recommend that you use Database Administration, rather than SQL Management Studio®, to perform the database administration tasks listed below, even if you are an experienced SQL Server user. Besides handling all the database tasks that you are likely to perform in a typical Sage 100 Contractor system, Database Administration was designed to optimize your data for Sage 100 Contractor, for example, by keeping related data in expected locations and creating backups automatically before performing certain critical processes. In the rare event that you need to use SQL Management Studio® to perform a task that is not provided in Database Administration, you should contact Customer Support for assistance.

Database Administration includes the following database and company management utilities:

- **Create Company Based on Existing** and **Create Company** create new Microsoft SQL Server databases.

- **Rename Company** and **Delete Company** are convenient utilities when working with existing companies.

- **Deploy Sample Company** helps you install and refresh the sample data that comes with Sage 100 Contractor.

- **Tune Up Company Databases** performs various maintenance tasks to keep your database functioning efficiently.

- **Back Up Company Databases** enables you to back up your data "on demand," whenever needed.

- **Restore Company from Backup** restores a backed-up copy of your database.

- **Upgrade Company Databases** prepares your SQL company data so that it is compatible with the most recent version of Sage 100 Contractor 2016.

- **Migrate Company Data** and **Migrate Custom Reports** transfers your version 19.7 company data and custom reports to a new location for Microsoft SQL Server. Migrated files are located in shared folders under \\ServerName\CompanyName, organized using a folder structure similar to earlier versions.

- **Schedule Nightly Maintenance** utilities enable you to schedule backup and maintenance operations for times when other users are not logged into the system. You can also select the number of consecutive backups to keep.

- **Manage Company Admins/SQL Logins** utilities enable you to set up or delete logins to the SQL Server database, and to designate a user as a company administrator for a specified Sage 100 Contractor company.

- **Advanced Company Settings** lets you specify how long to keep history about database changes for each company, including details about changed records, such as the date and user ID of the employee made the change. Details older than the retention period you specify are cleared during nightly maintenance. (This history is maintained in separate audit tables, which you can query using SQL Server Management Studio.)
- **Advanced SQL Server Settings** includes convenient, sophisticated access and memory management controls for your SQL database.

For detailed information about these utilities and how to use them, see the Database Administration help or refer to the new *Database and Company Administration Guide.*

Additional Changes for SQL Server

In addition to the new SQL database platform and the Database Administration tool, you should note the following important differences from earlier versions:

- Because each user must now identify themselves to SQL Server using a unique SQL login, there is no longer a single Supervisor user. Instead, you designate as Company Administrators users who require elevated privileges in Sage 100 Contractor.

  > **TIP:** You can copy supervisor preferences used in version 19.7 to individual users in the version 20.1User List window.

- When starting Sage 100 Contractor, you first log in to an instance of SQL Server using a new **Connect to SQL Server** window, and then you select your company and type of access from the **Company List** window.

  If you need to change the type of access after logging into the company, you can return to the **Company List** window using the **Change Company/Access** link on the Sage 100 Contractor desktop.

  > **NOTE:** If you want to log in as a different user, you must close Sage 100 Contractor completely first, and then log in using a different user name.

- You no longer need to reindex your data after upgrading. Now, you use the Database Administration tool migrate your data from version 19.7 and to update it in future.

- Version 20.1 and subsequent releases are installed to a different location than version 19.7 and earlier versions.

  Having separate installation locations enables you to run version 20.1 and version 19.7 on the same computer while you migrate your data to the new version.

- You need to install the License Administration application and activate the software on the same computer as your version 19.7 license server, choosing the option to use the computer as the license server for version 20.1. After installing Sage 100 Contractor on other networked workstations, point to this machine as the license server.

  For more information, see the *Installation and License Administration Guide*.

Other Enhancements and Changes

More versatile Lookup windows

In version 20.1, Sage 100 Contractor provides a consistent and versatile set of enhanced Lookup windows throughout the program

Using the new Lookup windows, you can view information and select records in convenient new ways, including:

- Choose columns to display or hide in a Lookup window.

  On the **Options** menu in any Lookup window, click **Select Columns to Show**, then select the check boxes for each column you want to display in the Lookup window, or clear the check box to hide a column from view.

- View the names associated with columns that display certain numbered records, for example, the vendor names for vendor numbers, job names for job numbers, account names for account numbers, and so on.

  Sage 100 Contractor displays name columns automatically for these numbered records, identifying them by enclosing the column heading in parentheses, for example "(Vendor Name)."

  NOTE: You cannot hide these name columns while the associated number column is displayed, although you can minimize the column width by dragging the right edge of the column header. If you hide a number column, the associated name column is also hidden.

- Change the order in which columns appear in a Lookup window.

  Simply grab the column heading for a column you want to move, then drag it left or right until it is positioned where you want it to be.

  NOTE: If you separate a name column from its associated number column, the Lookup window does not retain the new position the next time you open the Lookup window. The name column always appears beside its associated number column when you open any Lookup window.

- View more accurate results, and find records more quickly, when you begin typing a search term in a data control box.

  The new Lookup windows display only the records that begin with the characters you type, filtering even more effectively as you continue typing.

  When you see the record you want, select it on the list, and then press [**Enter**] to use it in the transaction or other window you were working with.

When you close the window, Sage 100 Contractor automatically saves your display preferences, so columns appear as you want them the next time you use Lookup features in that window.

Unique Payroll record numbers

In version 20.1, after you archive payroll, payroll numbers continue in sequence, rather than starting from 1, as in previous versions. The advantage is that payroll record numbers are now unique for a company, even across years.

Migrating your company data from version 19.7

✳ IMPORTANT: You must be using Sage 100 Contractor version 19.7 to migrate your company to version 20.1. If you are using an earlier version of Sage 100 Contractor, you must first upgrade your company data to version 19.7.

You use the migration utility in the new Database Administration tool to automatically migrate and upgrade your data to version 20.1, including all company data in folders and subfolders of …\MB7\[CompanyName].

Migrated files are located in shared folders under \\ServerName\CompanyName. These subfolders are organized using a similar folder structure as in earlier versions, and include:

- Aatrix Forms
- Attachments
- Direct Deposit
- Images
- Reports

The Direct Deposit and Reports folders are available as soon as you open the company in Sage 100 Contractor. The remaining folders are created as needed.

📋 NOTE: For detailed, step-by-step instructions on migration, see the *Database and Company Administration Guide* or the Database Administration help.

Preparing for migration in version 19.7

Migration should proceed smoothly in most instances. However, you should audit your accounting data and your company payroll in version 19.7, and then fix any errors, before attempting migration to version 20.1.

Use the following audit tools to prepare your data in version 19.7:

- 1-6 Period and Fiscal Year Management > Audit Books
- 5-3-7 Payroll Audit
- 6-6-3 Purchase Order Audit
- 6-7-4 Subcontract Audit
- 12-5 Inventory Audit

📋 NOTE: If your data includes serious audit errors, you may need assistance from your business partner or consultant to prepare your database for migration.

Migrating reports

The new Database Administration tool also includes a utility to migrate and upgrade Sage 100 Contractor reports and reports written with the Sage 100 Contractor report designer.

In version 20.1, shared custom reports and form designs are located in these folders:

- \\ServerName\Sage100Contractor\Custom Reports
- \\ServerName\Sage100Contractor\Report Forms

Private custom reports and form designs are located in Sage 100 Contractor User Data folders associated with each user name, as follows:

- \\ServerName\Sage100Contractor\User Data\username\Custom Reports
- \\ServerName\Sage100Contractor\User Data\username\Report Forms

Updating custom reports

You also need to update custom reports created with third-party software, such as Crystal Reports, so they map to the new database.

We recommend that you use the new report views that come with version 20.1 to create or update reports. The new views were created for your convenience, so that future database changes will not necessarily break your custom reports.

After migrating your company data

After migrating your data, you will likely need to perform the following additional steps to prepare your company for use in Sage 100 Contractor:

✳ **IMPORTANT:** Use Database Administration, not SQL Server Management Studio, for all these tasks.

- **Add company administrators.** There is no longer a generic "supervisor" user as there was in earlier versions. All users must sign into the company using their personal IDs, and only users designated as company administrators have heightened privileges previously associated with the "supervisor" role. You can designate one user as a company administrator during migration, but you can add others later.

- **Add SQL logins for new users.** If you have new users that did not exist in your version 19.7 company, add them as users to the SQL database.

  You must also add them as users and assign security in Sage 100 Contractor.

- **Designate an additional SQL Server administrator.** Only a user with system administrator privileges for the SQL instance can administer users for SQL Server or assign the system administrator role to another user. Therefore, it is vital at all times that more than one user has a system administrator role. If the principal system administrator should suddenly fall ill, or leave your company, or otherwise be unable to perform their duties, another person with administrative access to the SQL Server database must be able to take over that role.

  NOTE: The person who installs Sage 100 Contractor is automatically assigned a 'sysadmin' role in SQL Server. When they designate a SQL Server administrator in Database Administration, that person is also assigned the 'sysadmin' role in SQL Server.

- **Switch your Sage Construction Anywhere to version 20.1.** If you have been using Sage Construction Anywhere with Sage 100 Contractor version 19.7 and want to use it with version 20.1, you will need to switch the connection to version 20.1. For help on switching the connection, see the instructions in the *Installation and License Administration Guide*.

- **Migrate your Sage ACT! settings to version 20.1.** If you have been using Sage ACT! with Sage 100 Contractor version 19.7 and want to use it with version 20.1, you need to change your ACT! settings to point to your new version 20.1 company database. For help on migrating your ACT! settings to version 20.1, see the instructions in the *Installation and License Administration Guide*.

- **Migrate each user's scheduled reports from version 19.7.** See the instructions in the *Installation and License Administration Guide*.

- **Migrate each user's alerts from version 19.7.** See the instructions in the *Installation and License Administration Guide*.

Changes to converted data

During migration, the program may encounter problems that might prevent it from writing a particular record to the new SQL Server database.

If the problem is one that the migration program can fix, it repairs the record, and then writes the updated record to the SQL Server database. (For a list of the types of errors that can be fixed during migration, see the *Database and Company Administration Guide*.)

NOTE: Not all errors can be fixed during migration. In these cases, the record is not written to the new database.

The migration log file

The program keeps a log of all changed records and records that were not migrated because of an unresolvable error, unless the record was invalid in version 19.7. (Invalid records are neither migrated nor logged.)

After migration, you should check the log file to see what changes were made to your data during conversion, or whether any records were not migrated to the new SQL database.

The _SQL_MIGRATION_LOG.TXT file is located in the source company's main folder (for example, C:\MB7\Sample Company). A supplemental file, _SQL_MIGRATION_LOG_VERBOSE.TXT, includes more detailed information about each error found.

Known Issues and Comments

The following sections describe known issues and problems in Sage 100 Contractor Version 20.1.

General

Internet access required for Sage 100 Contractor

Sage 100 Contractor features, such as printing or efiling tax forms, submitting enhancement requests, accessing Help, or downloading periodic product or tax updates all require Internet access.

To take advantage of these features, ensure that any workstation or server that Sage 100 Contractor is installed on has access to the Internet.

During installation of Sage 100 Contractor, 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 100 Contractor is installed, then disconnect the Sage license server from the Internet.

> **NOTE:** A static Internet connection using a compatible web browser is required for Sage Construction Anywhere. For current information on supported browsers, supported Sage 100 Contractor versions, and other system requirements, see the Sage Construction Anywhere help at http://help.sageconstructionanywhere.com/sage100contractor/help/Default.htm#01_Setup/System_requirements.htm.

Sage Advisor Update

Sage Advisor Update is a notification and download service that alerts you when an update is available for Sage 100 Contractor. You can use Sage Advisor Update to download and install updates available for Sage 100 Contractor and other Sage products for which you have a current Sage Business Care Plan.

> **TIP:** Use the **Customize** settings in the Windows system tray to make sure you can view the Sage Advisor Update icon and notifications from the System Tray in your Taskbar.

For more information about Sage Advisor Update, see "About Sage Advisor Update" in the User Guide and in the Sage 100 Contractor help.

Tax Forms and eFiling by Aatrix configuration requirements

Tax Forms and eFiling by Aatrix requires an Internet connection for two reasons:

- For updating forms and executable files.
- For electronic filing (eFiling) of the forms.

If you experience an Internet connection problem, it may be due to problems communicating through an Internet firewall. Firewalls need to have access allowed through specific ports:

- The Tax Forms and eFiling Updater uses standard SSL/HTTP port 80 to access the site http://updates.aatrix.com.

- The eFiling component uses secure HTTPS on port 443 to access the site https://efile.aatrix.com. By allowing access to aatrix.com, you allow both updates and eFiling. Occasionally, restrictions are tighter and only allow access to these ports by specific programs. Tax Forms and eFiling uses the following programs to access the Internet.

For updating using http on port 80 to http://updates.aatrix.com:

- aatrixforms.exe
- updater.exe
- updater2.exe

For eFiling using secure http on port 443 to https://efile.aatrix.com:

- builder.exe
- viewer.exe

Printing reports at year-end (U.S. Edition)

As of Version 19.2, in the U.S. Edition, if you pay retainage in the current year for a prior year invoice and then you print a 4 1 3 26 AP Aging report for the prior year, the report shows a reduced retainage amount, and the amount paid in the future period is allocated to the Current period or an aging period, depending on the due date of the retainage and the date it was paid.

Therefore, you should print these reports as part of your year-end processing to ensure that you have a set of reports that reflect the true amount of retainage outstanding at year end.

> **TIP:** If you archive your data at year end, you can also print the reports from the archive company, later.

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 other security weaknesses and threats.

A company processing, storing, or transmitting payment card data must be PCI-compliant or risk losing its ability to process credit card payments and being audited and/or fined. (For more information about PCI standards, see https://www.pcisecuritystandards.org/.)

Sage 100 Contractor payment processing works exclusively with Sage Payment Solutions to enable merchants to seamlessly process check and credit card transactions directly in Sage 100 Contractor. The payment processing program uses Sage Exchange, a secure payment-processing application, to connect to Sage Payment Solutions and process check and credit card transactions.

Integrating your financial and operations system with Sage Payment Solutions lets you process check and credit card transactions without storing your customers' sensitive card information in your database. Sage Exchange transmits check and credit card details through a secure connection to Sage Payment Solutions, where they are stored in a PCI-compliant vault, protecting your from exposure to non-compliance penalties and credit card fraud.

CAUTION: To avoid non-compliance with PCI standards, do not store credit card information in Sage 100 Contractor. Such storage creates unnecessary risk for your business and your customers.

Use Adobe Reader Version 8.1.3 or later for faxing

Customers have reported problems faxing from Sage 100 Contractor with versions of Adobe Reader earlier than 8.1.3. Adobe Reader Version 8.1.3 and later support faxing from Windows and from Sage 100 Contractor.

IMPORTANT: To fax from Sage 100 Contractor, 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 100 Contractor Help topic, "Installing the Windows Fax Service component."

Printing reports to PDF or exporting to Excel?

When you print reports to PDF, you may find that the size of the PDF file is unexpectedly large and the resolution of the displayed PDF is not optimal.

To create a substantially smaller PDF file with good resolution, you can run Sage 100 Contractor in Compatibility Mode (compatible with Windows 7), and then print the report.

NOTE: You cannot export to Microsoft Excel when running Sage 100 Contractor in Compatibility Mode if you use Microsoft Office 2013.

We have not encountered this issue during testing, nor has it been reported for Windows Server 2012 R2.

About network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. By default, Sage 100 Contractor uses the TCP starting port 48750. Certain configurations can potentially disable the communication:

- File sharing on computers running the Windows 8.1, Windows 7, Server 2008, Server 2008 R2, and Server 2012 operating system must be enabled. To enable file sharing, follow the instructions in the Windows 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.

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 8.1, Windows 7 Professional, Server 2008, or Server 2008 R2 Standard

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 8.1, Windows 7 Professional, 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.

Configuring anti-virus software and third-party firewalls

During installation of the Sage 100 Contractor Hosting Framework, the Windows Firewall is configured automatically to allow the Sage 100 Contractor 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 100 Contractor 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. For Windows Server 2008, click **Start > Control Panel > Security**.

   For Windows 7, click **Start > Control Panel > System and Security**

   For Windows 8.1, click **Start > All apps > Control Panel > System and Security**.

2. Open **Windows Firewall**, and then select **Allow a program or feature through Windows Firewall**.

3. If Sage 100 Contractor Hosting Framework is not on the list, you can add it by selecting **Allow another 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. 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.

Files to exclude when manually configuring your firewall for Windows 8.1 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\Program Files\Sage\Sage 100 Contractor
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 8.1 Professional 64-bit

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Aatrix Software
- C:\ProgramData\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 7 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\Program Files\Sage\Sage 100 Contractor
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 7 Professional 64-bit

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Aatrix Software
- C:\ProgramData\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 8.1 Professional

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Aatrix Software
- C:\ProgramData\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows Server 2008, 2011, 2012

- C:\ProgramData\Sage\Sage 100 Contractor
- C:\ProgramFiles (x86)\Sage\Sage 100 Contractor
- C:\Program Files (x86)\Aatrix Software
- C:\ProgramData\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Configuring Windows Regional and Short Date Format

To specify regional formats for Windows:

1. Click the [**Start**] button, point to **Control Panel**, then click **Clock, Language, and Region** .
2. Click **Region and Language**.
3. On the **Formats** tab, select the format for your country.
4. Under **Date and time formats**, from the Short date format drop-down list, select the format used for your country.
5. Click [**OK**].
6. Close the **Clock, Language, and Region** window.

Posting Status for a Company Created since Version 19.2

If you created a new company using version 19.2, or higher, *in certain limited scenarios* an issue can arise after you advance the year to the first period of the new fiscal year. The new year may not be available when you try to change the posting period.

A fix to prevent this issue is included in the January 2015 update. However, if you have already encountered this issue, contact Customer Support for assistance.

Windows 8.1 Professional and Server 2012 Standard Operating Systems

Windows 8.1 Professional and Server 2012 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 8.1 Professional or Server 2012 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.

To avoid this possibility, set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never":

1. **Start > All apps > Control Panel > System and Security > Power Option**s.

2. Select **Change when computer sleeps**.

3. From the **Put computer to sleep** list, select **Never**.

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 8.1

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 8.1 Professional or Windows 8.1 Enterprise operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Solution for Server 2012 error message about mb7.kpr file

If you encounter an error message about opening the mb7.kpr file when launching Sage 100 Contractor on a computer running Windows Server 2012, follow these steps to resolve the issue:

1. On the Window 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**, and then click [**Edit**].

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**].

7. On the **MB7 Properties** window, click [**OK**].

Server 2012 network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Server 2012 operating system must be enabled. To enable file sharing, follow the instructions in the Windows Server 2012 Help.

Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage 100 Contractor to run as administrator for scheduling reports

✳ IMPORTANT: On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage 100 Contractor reports requires that you "run as administrator" or to "run the program as administrator."

Microsoft Windows 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 100 Contractor 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 100 Contractor 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 100 Contractor as administrator do not affect the next person who logs on and launches Sage 100 Contractor 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 100 Contractor 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 100 Contractor. 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 100 Contractor program icon.
2. From the drop-down menu, click **Properties**.
3. On the Sage 100 Contractor 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, Windows 8.1 Professional, and Server 2008 R2 Standard "Sleep Mode" prevents computers from obtaining a license use

If a computer running the Windows 7 Professional, Windows 8.1, 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 Option**s.

2. Select **Change when computer sleeps**.

3. From the **Put computer to sleep** list, select **Never**.

Windows Server 2008 R2 and Microsoft .NET 3.5.1

Microsoft .NET 3.5.1 must be available and enabled prior to installing Sage 100 Contractor on a Windows Server 2008 R2 machine. Server 2008 R2 comes with .NET 3.5.1 loaded but not installed, so Sage 100 Contractor doesn't install it automatically.

If you attempt to install Sage 100 Contractor 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 100 Contractor 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 installation, install .NET Framework 3.5.1 and reinstall Sage 100 Contractor.

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

1. Click the **Start** button in the lower left 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.

Solution for Server 2008 R2 "Permission Error Opening File"

If you see a permission error message when launching Sage 100 Contractor 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.

   Selecting **Full control** selects all the check boxes necessary for this solution.

6. On the **Permissions** window, click [**OK**].

7. On the **MB7 Properties** window, click [**OK**].

Solution for Windows 2008 Server R2 Application Error Message

Under some circumstances, on servers operating Windows 2008 Server R2, you may see the following error message when trying to open a photograph or image file in Sage 100 Contractor:

"No application is associated with the specific file associated with this application."

This error message appears when you attempt to open an image file in Sage 100 Contractor but you have not yet enabled the Desktop Experience feature in Windows 2008 Server R2. If you receive this error message, install Desktop Experience using the Server Manager utility:

1. In Windows 2008 Server R2, select **Start > All Programs > Administrative Tools > Server Manager**.

2. In the **Server Manager** window, click **Features** (left-hand pane).

3. In the **Features** pane, click **Add Features**.

4. Select the Desktop Experience check box.

5. If you are prompted to add additional features, click [**Add Required Features**].

6. Click [**Next**].

7. Click [**Install**].

Windows 7 and Server 2008 Operating Systems

Solution for Server 2008 "Permission Error Opening File"

If you see a permission error message when launching Sage 100 Contractor on a computer running the Windows Server 2008 operating system, follow these instructions:

1. On the Window 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**].

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

If you are using a 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 Server 2008.

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**.

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

On a 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.