Sage 100 Contractor 2019 (SQL)

Version 22.1 Release Notes

Canadian and U.S. Editions

August 2019

Contents

Contents

July 2019 Update (Build 22.1.154)

This update includes some fixes and a U.S. tax update that are described in the following sections.

U.S. Payroll Tax Tables

Payroll tax tables have changed for Idaho in this update.

Enhancement for the U.S. Edition

New tax types for Washington State's Paid Family and Medical Leave contributions

We have created two new tax types required for reporting Washington State's Paid Family and Medical Leave contributions. The new tax types are:

- **20 – Employee State Paid Leave.** You use this tax type for payroll deductions for employees in Washington State who contribute to that state's paid family and medical leave plan.

- **21 – Employer State Paid Leave.** You use this tax type for employer contributions to Washington State's paid family leave plan. Employers that have more than 50 employees are required to make contributions to the family leave plan.

The **5-4-2 State Tax Forms PFML** report for Washington State relies on these tax types, and the report will not print if no tax calculations use them, even if you previously set up calculations for Washington State's Paid Family and Medical Leave contributions.

When you run the **5-4-2 State Tax Forms PFML** report for Washington State for the first time, Sage 100 Contractor displays a window where you identify the payroll calculations you have been using for employees who work in Washington and for employers who must make contributions to the medical leave. Sage 100 Contractor then automatically adjusts these calculations to use the new tax types.

> **Note:** You need to run this utility only once. When the payroll calculations are up to date with the new tax types, this window does not appear when you run the **5-4-2 State Tax Forms PFML** report.

Fixes in the July 2019 Update

Fixes for Both Editions

- When you create a new record from a template or copy and paste records in the **6-11-2 Requests for Information** window or the **6-11-8 Correspondence** window, message boxes now include the correct text from the template or the original record.

- Overriding a per diem calculation in the **5-2-2 Payroll Records** window no longer produces an incorrect calculation for the per diem expense.

- In windows that display only a grid (such as the **5-3-4 Paygroups** and **6-5 Cost Codes** windows), you can insert a row into the middle of the grid without receiving a SQL Server error. In earlier releases of version 22.1, you could only add a row at the end of a grid in these windows.

Enhancements in Version 22.1

This section describes the new features and enhancements you will find in version 22.1.

We've Been Listening to You!

Sage thanks you for your product ideas! In version 22.1, we have incorporated the following top-ranked suggestions from the Sage Ideas site. Later sections in the Release Notes describe changes that require more detailed explanation.

- You can look up previous bank reconciliations even if you do not save bank reconciliations individually as PDFs when you save the final bank reconciliation.

  You can now open, view, print, and even reverse previous final reconciliations.

  We have added a new **Sort by Item Amount** option to the **1-5 Bank Reconciliation** window, and we have added totals by credit card to the **4-7-5 Reconcile Credit Card Statements** window.

  For more details about these changes, see "Save "Final" Bank and Credit Card Reconciliations for Later Access" (page 8), later in this document.

  Thanks for these suggestions Stacie S., McKay F., Valerie L., Jennifer S., Jodi J., Melinda A.

- As an administrator, you can set command-level security for many menu options and related buttons, providing a finer degree of control over users' abilities to view sensitive information, such as wage rates, net pay, and total costs. Where security is available for an option or a corresponding button, highlight the command from the **Options** menu or the **Post** menu, press the **F7** key, and then use the Security window to control access for different types of users.

  For more information about this new feature, see "Command-Level Security for Many Options and Post Commands " (page 6), later in this document.

  Thanks for this suggestion Roger B., Nancy K., and Tom O.

- Field-level security was inadvertently missing from several key text boxes in the **5-2-2 Payroll Records** window, so we've added field-level security to the summary Gross Pay, Adds, Deducts, Net Pay, and Total Cost fields in the footer of this window.

  Thanks for this suggestion Nicole R.

- In windows that have a **View** menu, you can view the fields and commands to which access is

restricted in that window.

When you click **View > Security**, the program highlights the fields and commands for which security is turned on. In this View Security mode, you cannot edit any of the fields in the window, although you can still turn security off and on.

- You can now sort most grids that you open using a button in a primary window. (The grid then opens in a secondary window.) Select the header for the column you want to sort on, and then click the **Sort by** option. For example, you can sort open invoices, paid invoices, and subcontractors in the 4-4 Vendors window. (

  The few exceptions where you cannot sort grids are:

  - T&M Job Costs (in 3-2 Receivable Invoices/Credits)
  - Budget (in 3-5 Jobs)
  - Proposal (in 3-5 Jobs)
  - Routes (in 11-2 Work Orders/Invoices/Credits)

  Thanks for this suggestion Libbie E. and Rhiannon T.

- You can sort grids by name on columns that have a combined number and name.

- The program warns you when you try to post an AP invoice without a subcontract reference or, if you require a subcontract reference, it stops you from posting. This is similar to the existing **PO Warning** set in the **4-4 Vendors** window.

  For more details about this change, see "Warning when Posting an AP Invoice with No Subcontract" (page 11), later in this document.

  Thanks for this suggestion Rik M. and Tara G.

- You can easily transfer amounts between bank accounts.

  For more details about this change, see "Easily Transfer Amounts between Bank Accounts" (page 10), later in this document.

  Thanks for this suggestion Regina J.

- In the U.S. Edition, you can now set up and report on use taxes paid on payable invoices.

  For more details about this change, see "Easily Report on Use Taxes" (page 18), later in this document.

  Thanks for this suggestion Rhiannon T. and Kevin Q.

- When you inactivate a credit card account record in the **1-7 General ledger Accounts** or the **General Ledger Subaccounts** window, you can no longer select the associated credit card in the following windows:

  - 4-3-2 Pay Vendors
  - 4-7-2 Add/Edit Credit Cards
  - 4-7-3 Enter Credit Card Receipts
  - 4-7-4 Enter Recurring Charges
  - 4-7-5 Reconcile Credit Card Statements
  - 4-7-6 Pay Credit Cards

  Thanks for this suggestion, Sharon S.

- In the **13-2 Project Review** window, you can now include all jobs when you generate a graph by job or by code. To include all jobs in the graph, leave the Job# selection blank.

  Thanks for this suggestion Pam M.

- The **6-1-7-21** and **6-1-7-31 Over/Under** reports now correctly report on all active jobs, including job costs that are over budget. To include costs that exceed the budget, select the new **Permit Costs to Exceed Budget** check box.

  We have added a period selector to the **6-1-7-31 Over/Under~Extended** report. You are no longer required to specify a period.

  Also, both reports now provide the following selection criteria:

  - Job Type
  - Job Status
  - Job Supervisor
  - Salesperson
  - Estimator
  - Period (the default is now less than or equal to the current fiscal year)

  > **Note:** Because the report criteria have changed, any saved criteria for the Over/Under reports will be deleted during the upgrade.

  Thanks for this suggestion Kenneth K.

- The **6-4-2 Print Change Orders~Approved** reports correctly include previously approved changes regardless of the order in which they were approved.

The form designs for these two reports (**System.Change_Prime** and **System.Change_Prime_Request**) have new calculated fields for **Prior Approved**, **Prior Contract**, and **New Contract** amounts. If you customized these reports and you want to retain the previous style, which did not take the approval date into account, you can keep them. However, if you want to take advantage of the new calculated fields, you need to modify your form to replace the old calculations with the new ones.

Thanks for this suggestion Rik M.

- In the **4-7-3 Enter Credit Card Receipts** and the **4-7-6 Pay Credit Cards** windows, we have added a quick list for the **Payee** box.

  Thanks for this suggestion Charlene D.

- In the **A/P Invoices** grid associated with the **3-5 Jobs** window, we added a **Vendor** column to identify the vendor for an invoice.

  Thanks for this suggestion Roxi M.

- When listing invoices in the **6-6-1 Purchase Orders** window, the program no longer includes amounts from void invoices.

  Thanks for this suggestion Deborah B. and Susannah M.

- When displaying payment history in the **3-2 Receivable Invoices/Credits** window, the program lists the most recently paid invoices first.

  Thanks for this suggestion Phyllis B.

- You can now sort the **Combined AR/SR Aging** reports alphabetically.

  Thank you Jennifer L. for this suggestion.

Command-Level Security for Many Options and Post Commands

In earlier versions, you could limit access to specific windows and fields in a window by setting security access using the **F7** key. However, this menu- and window-level security did not prevent a user from using Option commands and buttons to view sensitive information in separate windows, or perform other functions that you want to restrict.

Now, you can exercise a finer degree of control over who can use Options and Post menu commands and related buttons to view sensitive information. You use this new feature to allow users to enter information in a window while preventing them from viewing sensitive information in related windows. Restricting access in this way can be especially useful for Payroll windows where users might need access to a data-entry window, but should not be able to view employees' personal information or pay rates.

Where security is available for an **Options** menu or **Post** menu command or for a corresponding button,

you click the command on the menu, and then press the **F7** key to open the Security window for that command. You use the Security window to allow access to different types of users. For example, in the **1-4 Recurring Transactions** window, select **Post > Multiple Transactions**, press **F7**, and then select the check box beside each security group that can post recurring transactions. Clearing all the check boxes removes the security for the command.

> **Note:** Only Options menu and Post menu commands that do not already require administrative rights provide this command-level security.

> **Important!** You must now use the new **F7** security feature to provide security for the following buttons:
>
> - 3-5 Budget
> - 3-5 Purchase Order
> - 3-5 Subcontracts
> - 3-5 Change Orders
> - 3-5 A/R Invoices
> - 3-5 Payment History
> - 3-5 Proposal
> - 3-5 A/P Invoices
> - 3-5 S/R Invoices
> - 3-6 Job List
> - 3-6 A/R Invoices
> - 3-6 Service Invoices
> - 3-6 Service Orders
> - 3-6 Service Quotes
> - 3-6 Payments
> - 4-4 Subcontracts
> - 4-4 Open PO's
> - 4-4 Closed PO's
> - 4-4 Open Invoices
> - 4-4 Paid Invoices
> - 4-4 Invoice Payments
> - 4-4 All Payments
> - 5-2-1 Earnings

- 5-2-2 Payroll Records
- 6-4-1 Create A/R Invoice
- 6-4-1 Create Purchase Order

Security reports

The new **13-7-23 Security Settings** report shows the security groups that have access to menu commands and buttons. You can run this report for users and for security groups.

We have also added command and button security settings to the existing **13-7-22 Database Security/User Def** report.

Save "Final" Bank and Credit Card Reconciliations for Later Access

When you save a final bank or credit card reconciliation, Sage 100 Contractor stores the current reconciliation information in new database tables. This means you can now open, view, print, or even reverse previous final reconciliations.

To save a bank reconciliation:

1. In the **1-5 Bank Reconciliation** window, click **File > Save**.

2. In the **Save Bank Reconciliation** window that opens, select one of the following options depending on the state of the reconciliation:

    - Save as trial reconciliation.

    - Save as final reconciliation.

3. If you selected **Save as final reconciliation**:

    a. If you want to create a PDF copy of the reconciliation information, select **Create a PDF**.

    b. In the **Description** box, type a description for the reconciliation that will help you to recognize it, later, in the **Select Bank Reconciliations** window.

    c. In the **Statement Ending Date** box, either accept the default ending date for the reconciliation or type a different one.

4. Click [**Save Trial**] or [**Save Final**], depending on the type of reconciliation you are saving.

    When you click [**Save Final**], the program saves the information in the reconciliation grid, along with the description and statement ending date.

> **Note:** You save credit card reconciliations in the same way in the **4-7-5 Reconcile Credit Card Statements** window. After saving a final credit card reconciliation, a message invites you to make a payment on the credit card. If you click [**Yes**], the **4-7-6 Pay Credit Cards** window opens so that you can enter the payment.

To view a saved reconciliation:

1. On the new **Previous Reconciliations** menu, click **Saved Reconciliations**.

2. In the **Select Bank Reconciliations** window that opens, double-click a saved reconciliation.

   Sage 100 Contractor displays the reconciliation in the **1-5 Bank Reconciliation** window.

Sort bank transactions by amount in the reconciliation grid

You can use a new **Sort items by Amount** option in the **1-5 Bank Reconciliation** window to display transactions by amount in the reconciliation grid.

Reverse an earlier bank reconciliation

With version 22.1, you can reverse a final bank reconciliation you saved earlier.

If you made an error in a bank reconciliation, or saved it prematurely as a final reconciliation, you can reverse the reconciliation and continue to work with it, or correct the error.

To reverse a saved reconciliation:

1. In the **1-5 Bank Reconciliation** window, click **Previous Reconciliations** > **Saved Reconciliations**.

2. In the **Select Bank Reconciliation** window that opens, double-click the reconciliation you want to reverse.

   Sage 100 Contractor displays the reconciliation in the **1-5 Bank Reconciliation** window. At this point, you can only:

   - Print transactions.

   - Scroll through the transactions in the grid.

   - Select a transaction on the grid, and then click [**Go to transaction**] to view it in the original entry window.

   - Start a new reconciliation.

   - Click the [**Undo Final**]. button to reverse the reconciliation. Until you reverse the reconciliation, you cannot work with the items in the grid.

3. Click [**Undo Final**].

When you click [**Undo Final**], the reconciliation reverts to a Trial state, so you can clear transactions and enter adjustments.

Enhancements in the 4-7-5 Reconcile Credit Card Statements window

View totals for each cardholder

In the **4-7-5 Reconcile Credit Card Statements** window, you can view subtotals for verified credit card transactions for each cardholder whose transactions appear in the reconciliation grid. You select the cardholder from a new **Card Account Total** list box. Then, Sage 100 Contractor displays the total Credits Verified and Charges Verified in boxes below the **Card Account Total** box.

A clean start for new reconciliations

In version 22.1, when you start a new reconciliation (by clicking the **New record** button or **File** > **New**), only the **Card Issuer Account** and the **Statement Cutoff Date** fields are available until you select the Card Issuer Account. The program displays the current balance after you select the card issuer.

Other reconciliation enhancements

- In the **1-3 Journal Transactions** window, you now receive a warning if you change the **Cleared Credit Card Reconciliation** option.
- When you print transactions from the **1-5 Bank Reconciliation** window, the report prints "Match" to indicate matched records.

Easily Transfer Amounts between Bank Accounts

You can easily record cash transfers between two bank accounts.

You use either the **1-1 Checks/Bank Charges** window or the **1-2 Deposits and Interest Charges** window to open the new **Transfer Funds** window, where you record funds transfers.

You use the new **Transfer to Another Account** option in the **1-1 Checks/Bank Charges** window and the new **Transfer from Another Account** option in the **1-2 Deposits and Interest Charges** window to open the **Transfer Funds** window.

In the **Transfer Funds** window, you specify the bank accounts involved in the transfer. You must specify the two valid cash accounts that you are transferring funds from and to. Also, you specify a bank clearing account to offset the debit and credit from the two-part transfer.

The transfer is actually posted as two transactions:

- One transaction credits the account the funds you are transferring funds from and debits a cash clearing account.
- The other transaction debits the account receiving the funds and credits the cash clearing account.

Note that the net effect of the transfer on the clearing account is zero.

You reconcile one transaction for each bank account. You reconcile the transaction in the "From" account the same as you would for a check (cheque, in Canada). You reconcile the transaction in the "To" account the same as for a deposit.

> **Note:** If you try to void a transaction that is part of a transfer, the program warns you that the other transfer transaction will also be voided. You can choose to proceed or not. However, you cannot void one part of a transfer if the other transaction has been cleared.

Warning when Posting an AP Invoice with No Subcontract

In the **4-4 Vendors** window, you can set a warning that appears when you try to post a payable invoice without a subcontract reference. We renamed the existing PO Warning option **PO/Contract Warning**, and you can now select:

- 0 - None
- 1 - Warn if no PO
- 2 - Warn if no Subcontract
- 3 - Warn if no PO or Subcontract
- 4 - Require PO
- 5 - Require Subcontract
- 6 - Require PO or Subcontract.

During the database upgrade, any vendor records marked **2 - Require PO** will be updated to **4 - Require PO**.

View Sage Messages in Sage 100 Contractor

Sage now delivers messages tailored to your specific version and edition right inside the software.

Sage 100 Contractor receives new messages from the Sage message server when you start the program, and it continues to receive messages periodically while the program is open.

You can view these messages in the following ways:

- **The Message Carousel.** You use the Message Carousel to view all new messages, and messages that you have not yet dismissed using the [**Don't show this message again**] button. You use it to scroll through messages one at a time.

- **The Message Center.** The Message Center lists all your unexpired messages in a grid, except messages you discard.

A new [**Message**] button, located at the bottom left of the program desktop, alerts you when there are new messages. A number at the top right corner of the button indicates the number of messages you have received, but not dismissed or discarded.

The Message Carousel

If there are new messages, you click the [**Message**] button to open the Message Carousel.

The carousel displays new messages one at a time. Each message includes a title, a brief subject, and a link to detailed message content.

You can decide what to do with each message, as follows:

- Click [**Learn More**] to display a detailed message on a web page.

- Click [**Don't show this message again**] to dismiss the current message from the carousel.

  > **Note:** Messages continue to be available in the carousel until you dismiss or discard them, or they expire.

- Click **<** or **>** at the edges of the window to scroll through multiple messages.

  The message indicator at the bottom center of the carousel indicates the number of messages in the carousel and the current one.

The Message Center

The Message Center displays all messages, including messages that you dismissed from the carousel and messages that you prefer not to be notified about, until they expire or you discard them.

To open the Message Center, click **Resources > Sage Messaging > Message Center**.

To view a particular message, you click the Subject link. You can remove selected messages from the system and you can view other properties about messages, such as the type and expiration date.

> **Notes:**
> - You cannot manually remove Critical messages, which are typically Support alerts.
> - Messages continue to be available in the Message Center until you discard them or they expire.

Sage Messaging Preferences

Each Sage 100 Contractor user can set their own preferences for notifications about different types of Sage messages.

To open the Sage Messaging preferences window, click **Resources > Sage Messaging > Preferences**.
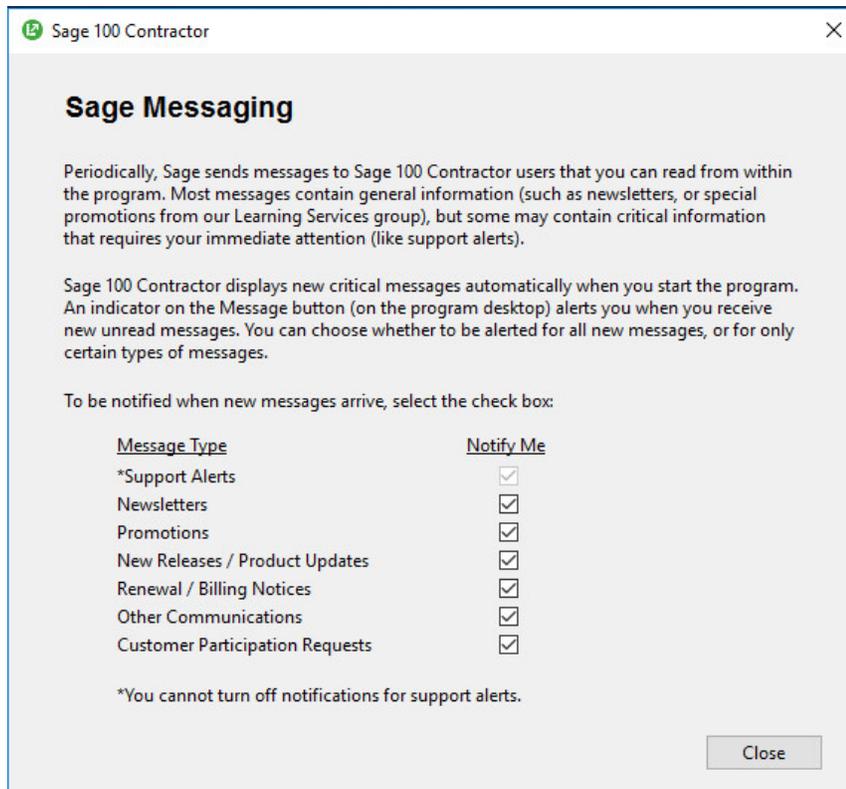
All message types are selected by default, but you can clear the check boxes for the message types for which you do not want notifications. Messages for which you choose not to receive notification do not appear in the Message Carousel, but they are available in the Message Center until you remove them or they expire.

> **Note:** You cannot turn off notifications for Support Alerts.

Critical Messages

Messages can be informational or critical. Critical messages differ from informational messages in these ways:

- When you start the program, Sage 100 Contractor automatically opens the carousel if there are new critical messages.

  > **Tip:** You can dismiss a critical message, once you have read it, if you do not want the carousel to open whenever you start the program until the message expires.

- You cannot discard critical messages in the Message Center.

If you receive a critical message after you have started Sage 100 Contractor, notification is the same as for any other type of message. The carousel does not automatically open while you are working in the program.

> **Note:** You cannot turn off notifications for Support Alerts.

Create Job Templates to Use and Reuse in Takeoff

You can now create and use templates that contain all the data you need to generate takeoffs. Essentially, takeoff templates are estimates that are not tied to a particular job until you choose to assign a template to a job. Takeoff templates can save you considerable time, provide consistency, and help to ensure that estimators do not overlook any aspects or opportunities for a job.

Because takeoff templates are not tied to a particular job or bid items, they provide greater flexibility than standard takeoffs. For example, you can:

- Set up templates that represent typical job estimates with parts and costs from your database that you can update, adapt, and assign to different jobs in future.

- Set up alternate cost scenarios using templates and bid items (active and inactive), enabling you to prepare alternative bids before you assign the template to a job.

The ability to mark bid items active and inactive is what gives takeoff templates their power and versatility. When you set bid items Inactive in a template, they are not displayed in the takeoff grid or used in calculations when you assign the template to a job. You can set bid items Active or Inactive at any time, depending on the job. Before you assign a template to a job, make sure all the bid items you need are marked **Active** and those you do not need are marked **Inactive**. When you assign a template to a job, only the active bid items are used in the job takeoff and saved to the database.

> **Important!** Values for certain fields in the template must exist in the database before you can assign a template to a Job. These required fields are Assemblies, Parts, Tax Districts, Vendor, Cost Code, Cost Type, Task, and Inventory Locations. If any of these fields exist in the template, but have no values in the database, Sage 100 Contractor will prompt you to resolve these issues before you can assign the template to a job.

You create and modify takeoff templates as you would a regular takeoff, with the following differences:

- You use the **9-5 Takeoff** *Templates* window to work with templates. (You use the Takeoff Launch window to open takeoff templates.)

- Templates do not support attachments, custom fields, row tags, or printing.

- Templates do not support options that would modify the database (for example, you cannot export purchase orders or budgets).

- Because templates do not write data to the database, there is no record or field history to track. Therefore, the View menu does not exist for templates.

> **Tip:** You don't always need to create templates from scratch. If an existing takeoff or takeoff template contains elements that you frequently use in jobs, you can export the takeoff or template to create a new takeoff template that you can modify as needed.

Assigning takeoff templates to a job

You assign templates to specific jobs using the **9-5 Takeoff** *Templates* window. (After you open the template, click **File** > **Assign to Job**.)

Changes to the Takeoff Launch window

We've added a new **Templates** tab and placed the existing takeoff information on a new **Job Takeoffs** tab in the Takeoff Launch window. These separate tabs help you to distinguish between takeoffs that are associated with specific clients and bids, and your takeoff templates.

> **Note:** Before you can open the 9-5 Takeoffs window, you must either select an existing takeoff or template or enter a job number in the Takeoff Launch window .

The new Templates tab
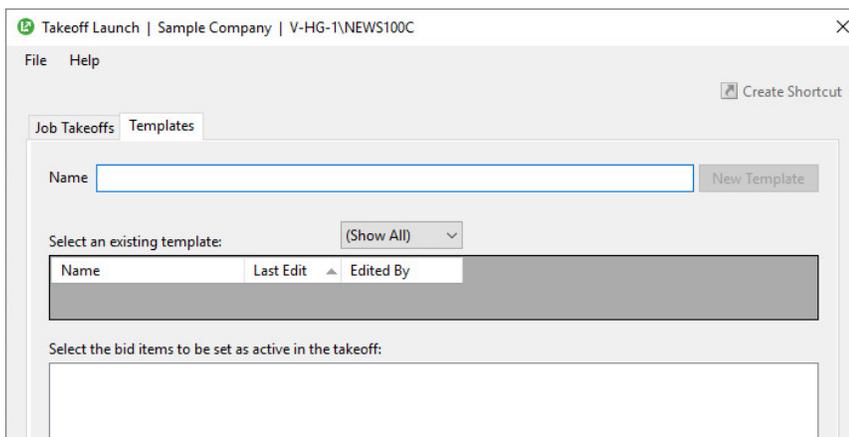
You use the Templates tab to:

- Create a takeoff template.
- Open an existing template.
- Set bid items active for a selected takeoff template.

To open an existing takeoff template:

1. Open the **9-5 Takeoff Launch** window.
2. Select the **Templates** tab.
3. Double-click the template name on the template grid.

To create a new template:

1. Open the **9-5 Takeoff Launch** window.
2. Click the **Templates** tab.
3. In the **Name** box, type a name for a template.
4. Click [**New Template**].
5. In the **9-5 Takeoff Templates** window that opens, use the grid on the **Template Details** tab to enter project information as you would for any takeoff.
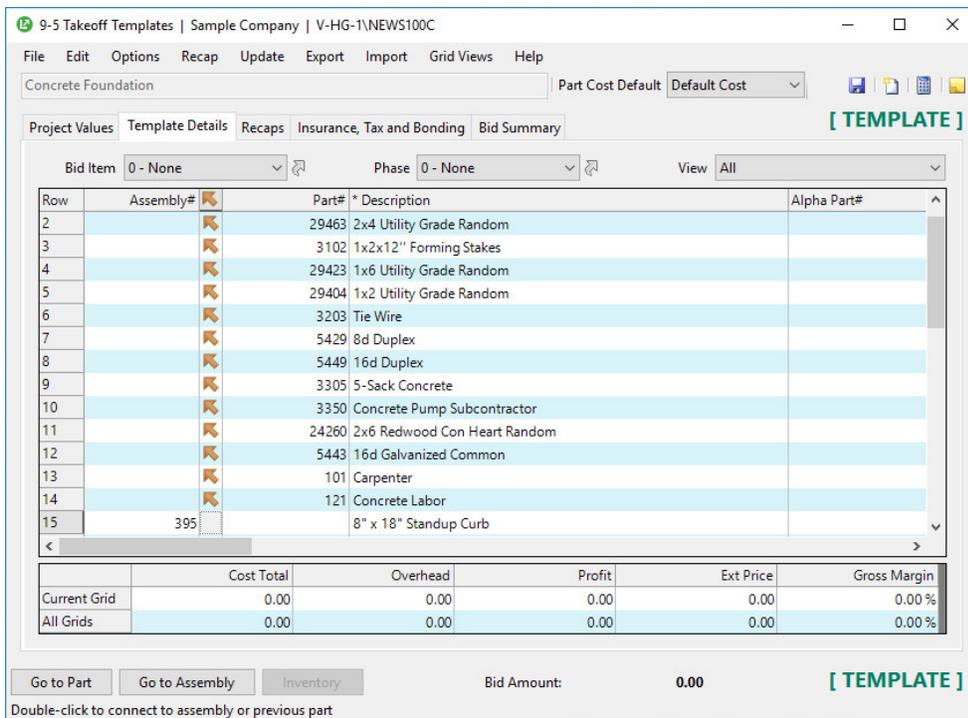
6. Save the template.

> **Tip:** If you have a takeoff that represents a typical estimate, and you want to reuse it for takeoffs in the future, you can save it as a template. Simply open the takeoff in the 9-5 Takeoffs window, and then click **Export** > **As Template**.

To assign a template to a job:

1. Display the template in the **9-5 Takeoff Templates** window.

2. Click **File** > **Assign to Job**.

3. In the **Assign Template to Job** window, click the down arrow ( ) to open the job lookup window, and then double-click the job on the list.

   > **Tip:** If the job does not yet exist, click the details button ( ) to open the 3-5 Jobs window, where you can create the job on the fly.

Other Improvements

Version 22.1 also includes the following improvements:

- In the **5-2-2 Payroll Records** window, you can fix payroll that you posted to the wrong checking account.

  On the **Options** menu, we have renamed the **Change Posted Payroll Period** option **Modify Transactions for Posted Payroll**. Clicking this option opens a renamed Modify Transactions for Posted Payroll, which now includes a new **Change Checking Account to** box where you select the correct checking account.

- Two **5-1-8 Hours** reports, **81 - Sick Days Earned and Used** and **Vacation Hours Earned and Used**, now include column totals for **Sick Days Earned** and **Used**.These reports also show subtotals for the employee the Taken Hours, Hours Worked and Accrued hours.

- You can resize the text in Notes windows.

  On the **Edit** menu, click **Text Size**, and then click Smaller or Larger, as needed. You can also click **Ctrl -** or **Ctrl +** until the text is the size you want. You can shrink the text to font size 6, or enlarge it to font size 27.

- If a nightly backup process fails for some reason, Sage 100 Contractor records that fact in the Application log under Windows Logs in the Event Viewer.

  The error is reported as "Nightly backup process failed for <<company name>>" followed by the error information, showing the source of "Sage 100 Contractor Nightly Backup". You can filter the log by Event source, "Sage 100 Contractor SQL Nightly Backup, as well as by event level.

- Sage 100 Contractor now checks your spelling as you type in the **Information Requested** and **Information Supplied** text boxes in the **6-11-2 Requests for Information** window, and in the **Message** text box in the **6-11-8 Correspondence** window.

  You turn on the spell checker in the Field Properties windows for the text boxes. Click in the text box, press **F7**, and then select the **Check Spelling** option. Click [**Save**]. You must also close and then reopen the **6-11-22 Requests for Information** window or the **6-11-8 Correspondence** window for the change to take effect.

- To provide some flexibility in the layout of the **3-4-24 Combined Statements** report (for example, to prevent overlap when descriptions are long), we have added three new report options that you can use to show or hide columns:

  - Show All Columns
  - Hide Paid/Credit Column
  - Hide Job/Work Order Column

- We have updated Sample Company dates to the year 2019.

Enhancements for the U.S. Edition

Easily Report on Use Taxes

In the U.S. Edition, we have improved the tracking and reporting of use taxes. (These are taxes that you must remit in some states when you purchase items or services on which no tax was collected by the seller–for example, a tax on out-of-state purchases.)

Previously, to record use tax in the **4-2 Payable Invoice/Credits** and the **4-7-3 Credit Card Receipts** windows, you had to complete the invoice grid entry, and then click the [**Calculate Use Tax**] button, which added two lines to the AP invoice grid for use tax payable and use tax expense. There was no easy way to report on use taxes due on the payable invoices.

Now, you set up separate use tax posting accounts in the **1-8 General Ledger Setup** window. Instead of carrying the use tax posting detail on the invoice grid lines, the ledger transaction for the payable invoice contains the posting detail for the use tax, while the payable invoice includes the total amount of use tax as well as the tax district it applies to.

Setting up use taxes

You use the **1-8 General Ledger Setup** window to identify the posting accounts for use tax payable and the associated WIP, direct, equipment, and overhead expenses.

> **Note:** You cannot specify an account that has subaccounts or departments for any use tax expense accounts.

Setting up a warning in vendor records

If you want to warn users when they should include use tax on an invoice, or compel them to do so, set the **'Use Tax' Warning** option to **1 - Warn if no Use Tax** or **2 - Require Use Tax** on the **Invoice Defaults** tab in the **4-4 Vendors** record. (You can also accept the default **0-None** entry if you do not want to warn users when a use tax is applicable.)

During the upgrade to version 22.1, if an amount exists in the old **'Use Tax' Rate** field, the warning is set to **1-Warn if No Use Tax**.

Entering use taxes on payable invoices

The **4-2 Payable Invoices/Credits** and **4-7-3 Enter Credit Card Receipts** windows provide new **'Use Tax' District** and **Use Tax** amount boxes for tracking use taxes payable.

In the **'Use Tax' District** box, you select the sales tax district to which you owe the use taxes. When you specify a use tax district for payable invoices and credit card receipts, use taxes are posted to the new WIP expense, direct expense, and equipment expense accounts for that district proportionately, with any residual amount posted to the **Use Tax Overhead** account.

When you specify a **'Use Tax' District** and then either save an entry or select the **Use Tax** box, Sage 100 Contractor automatically calculates the tax amount and displays it in the **Use Tax** box. You can change this amount.

Use tax calculations are not applied to sales taxes, if sales tax exists on the invoice. For cases where an invoice also includes sales tax, you should set up a use tax district to apply only the difference in the rate between the sales tax and the use tax.

Reporting use taxes

We have added a **4-1-7 Use Tax Report** menu, from which you can print the new, customizable **4-1-7-21 Use Tax** report that prints by **'Use Tax' District**. You can filter the report by ranges of invoice dates, vendors, and statuses.

Enhancements for the Canadian Edition

New Payroll Type for Retiring Allowances

In the **5-2-2 Payroll Records** window, we have added a new payroll type that you can assign for severance pay or retiring allowances.

When you assign the new payroll type **7- Retiring Allowance**:

- CPP and Employment Insurance are not deducted from the payment.
- The payment amount is reported in **Box 66 - Eligible retiring allowances** on T4s.
- Federal and provincial income tax are computed as lump-sum payments, as for bonuses.

We have updated the **5-3-7 Payroll Audit** accordingly.

Do You Have a Product Idea You Want to Share with Us?

We want to hear it!

To suggest a product enhancement when you're working with Sage 100 Contractor:

1. On the Sage 100 Contractor desktop, click the **Home & Resources** tab > **Submit Product Idea**.
2. Log in to the Sage 100 Contractor Ideas site (or sign up).
3. Describe your idea.
4. (optional) Browse through others' suggestions, and vote for the ones you love!

Or visit https://www5.v1ideas.com/TheSageGroupplc/Sage100Contractor any time you're online!

Delete this text and replace it with your own content.

Fixes in Version 22.1

Fixes in both editions

Version 22.1 includes the following software fixes in both the U.S. and Canadian editions:

- We have improved spell checking while you type in Notes windows. The program no longer slows down after finding several spelling errors while you type. Also:

  - The **Spell Check on Save** and **Spell Check While Typing** menu settings are saved by user, rather than globally.

  - We have removed the **Spell Check** menu item from the Edit menu because it is no longer required.

  - The **Spell Check** button on the toolbar now turns the Spell Check While Typing option on and off.

  - The **Spell Check on Save** option prevents you from saving if spelling errors exist when you first save a note.

    If you continue to try to save the note, you can choose whether to save it with spelling errors.

- When you export **5-2-8 Timecard Journal** long reports (numbered 52, 61, 62, 71, and 72) to Excel, the correct hours and rates are exported. We have also:

  - Fixed the alignment in the report so that the rate and hours appear correctly.

  - Moved the number of pieces in the summary section from the Hours column to a new Pieces column.

- In the **11-2 Work Orders/Invoices/Credits** window, setting the **Lock After Save** property of the **Client** and **Tax District** fields ensures that users cannot change these fields in service quotes and work orders.

- When you open a posted Payroll transaction from the Job or Equipment Cost window, and then save changes in the **1-3 Journal Transactions** window, Sage 100 Contractor voids the original transaction and creates a new transaction with the correct employee and dates.

- When you search for records using the Job Costs Payroll Costs by Job query in the **6-3 Job Costs** window, the results no longer include void records.

- The **5-1-8-81 Sick Days Earned and Used** and **5-1-8-86 Vacation Hours Earned and Used** reports no longer include payroll records that been reversed or voided.

- In the grid in the 9-3 Assemblies window, double-clicking on the border between column headers no longer changes the connection arrow in the first row.

- In the **3-6 Receivable Clients** window, we have improved the performance of the Client Locations grid when you save a location, especially if you have a large number of client locations.

- Multiple (duplicate) statements are no longer emailed to a client, which used to occur in some situations.

- **Combined AR/SR Invoice Aging** reports aged by Invoice date now report invoice dates in an **Invoice Date** column.

- You can now turn off **Exclusive Access** without having to switch companies first, even if you are using a SQL login.

- In the **9-5 Takeoffs** window, the program displays overhead and profit rates properly when you insert assemblies using Multi-Select Mode in the lookup window.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- Receivable holdbacks are now reported in the Cash Position section of the dashboard.

- In the **3-2 Receivable Credits/Invoices** and the **4-2 Payable Credits/Invoices** windows, when you bill a job that has more than 20 invoices with a holdback, the holdback invoice amounts are correct.

- ROEs printed for employees paid semi-monthly now accumulate amounts correctly by week. Previously, in some circumstances, amounts did not print in each box, with amounts for two weeks aggregated in one box, leaving one box blank.

- When you specify **Find** queries using a range of dates that spans more than one month, the program now properly returns all results that meet the date criteria. (Previously, if you used the date format *dd/mm/yyyy* to specify a range of dates and the start day for the range was greater than the end day, the query returned only results for the start date. For example, if the start date was 15/03/2019 and the end date was 14/04/2019, only records that used the date 15/03/2019 were included.)

Fixes for the U.S. Edition

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

- You can now save calculations in the **5-3-1 Payroll Calculations** window with **Tax Type 0 – None** and **Calculation Method 2 - % Total Taxable Wages**. You can also change any existing **Tax Type 0 – None** calculations to **Calculation Method 2 - % Total Taxable Wages**, as necessary.

- The 5-1-11 California Certified Payroll report now reports fringe benefits as hourly rates, not as total amounts.

  However, if you want to continue to report fringe benefits as total amounts earned on a job, create a blank file in the Sage100Contractor Global Settings folder (C:\Users\Public\Documents\GlobalSettings\Sage100Contractor) with the file name **ReportCaliforniaCertifiedPayrollFringeBenefitsAsTotalAmounts**—with no file extension. This existence of this file triggers the program to report the fringe benefits as total amounts on the California Certified Payroll report, as before.

  > **Note:** This file affects only the California A-1-131 report.

API for third-party developer products

This release provides the following fixes for and enhancements to the API:

- We have added a new **Partner Data** subfolder to **\Sage100Con\Common** for storing third-party application files. We intend to keep this accessible location intact during future Sage 100 Contractor development. Database Administration creates this folder, with the same security permissions as the \Common folder, if it does not exist when you connect to the server.

  When saving files to this folder, use the DBX_ extension to ensure that the files are easily identified and kept in a defined structure.

  > **Note:** This folder is not included in the backup maintenance routines.

  For more information, see the README.RTF file in this folder.

- We have fixed the formatting of the error message that is displayed when a user tries to log into a program that is not approved in Advanced SQL Server Settings in Database Administration.

- Using the API's SubcontractModRequest function does not clear change amounts and now correctly calculates the New Subcontract and Remaining amounts and the totals for the subcontract when change orders reference subcontractor lines.

  Also, the Subcontract Over Budget report now correctly includes change amounts.

Upgrading from Sage 100 Contractor earlier than v21?

New Entitlement Server

For version 21, Sage moved its Entitlement server (used to allocate license uses based on the license you have purchased) to a new, more secure server.

After installing this version of Sage 100 Contractor, you will need to open the License Manager and enter your **Sage Client ID** and **Registration Name** even if you have been using an earlier version of Sage 100 Contractor.

> **Important!** You must enter your Client ID and Registration Name *exactly* as they appear for your account in the Customer Portal.

> **Tip:** Before you install version 21, open **License Administration**, copy the **Sage client ID** and **Registration name** from the **License information** tab, and then paste them into a text document. After installing version 21, copy the **Sage client ID** and **Registration name** from the text document into the version 21 License Administration window.

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Earlier versions of Sage 100 Contractor (SQL) provided a wide variety of new features, including many enhancements that our customers have requested.

The following table is a list of the most significant features introduced in earlier versions, details of which you can read about in the Release Notes for the respective version.

Enhancements by version	U.S. Only	Canada Only	API
Version 21.3 enhancements (For details, see the v21.3 Release Notes)			
Some minor enhancements plus U.S. tax updates.			
Version 21.2 enhancements (For details, see the v21.2 Release Notes)			
Ability to merge client records			
Ability to merge vendor records			
Ability to include a record's attachments when you email forms			
Ability to email statements to jobs and clients			
Ability to record external vendor payments			
Ability to specify a secondary backup location			
Ability to track vendor certificates by job			
More ways to list vendor invoices to pay			
Version 21.1 enhancements (For details, see the v21.1 Release Notes)			
Bank feeds			

Enhancements by version	U.S. Only	Canada Only	API
Ability to email direct deposit stubs at a later date			
Enhanced cost type validation			
Enhanced Search (Find) in the 9-5 Jobs window			
Ability to move company to a new drive			
Ability to view an employee's pay raise history			
Ability to create timecards for individuals in Daily Payroll			
Ability to create payroll records for salaried employees			
Ability to restrict exclusive access for specific non-administrative users			
Version 20.7 enhancements (For details, see the v20.7 Release Notes)			
Ability to print a new 5-1-8-86 Vacation Hours Earned and Used Report	X		
Version 20.6 enhancements (For details, see the v20.6 Release Notes)			
New Server Management Tools			
Ability to set records "Inactive"			
More efficient login			
Ability to replace Cost Codes, Vendors, Tasks, or Inventory Locations in a takeoff			
New Combined Accounts Receivable and Service Receivables aging reports			
Ability to print Accounts Receivable Aging Reports by Invoice Date			
Ability to print Accounts Payable Aging Reports by Invoice Date			
Ability to print Service Invoice Aging Reports by Invoice Date			
New banking categories you can assign to bank-related journal transactions			

Enhancements by version	U.S. Only	Canada Only	API
Improved vacation tracking	X		
Version 20.5 enhancements (For details, see the v20.5 Release Notes)			
Ability to use new custom fields in most windows			
Ability to tag rows for followup in the 9 -5 Takeoffs grid			
Audit Information is available in Advanced Company Settings			
Numeric fields provide automatic calculation			
Easier access to user subfolders in workgroups			
Ability to correct the period of a posted payroll transaction			
Ability to skip automatic calculation during takeoff			
Ability to filter cost codes by Job and Phase in lookup windows			
Ability to filter unassigned work orders on the Dispatch Board			
A new option for saving and selecting company-specific custom reports and forms			
Ability to use a new standard calendar to select dates			
Support for Microsoft SQL Server 2016 and Windows 2016 Server			
Ability to copy user process maps			
Ability to use high contrast display settings for Windows 10			
Ability to print a new Payroll Check Register 5 -1 -2 -31 by check date			
3 -7 Progress Billing and 12 -2 Inventory Allocation allow 5,000 rows			
Tax and Workers' Comp rates in 4 -4 and 4 -2 use 4 decimal places	X		
Workers' Comp Reports 21, 86, and 96 show Overtime Hours	X		
Version 20.4 enhancements (For details, see the v20.4 Release Notes)			
Ability to copy external files to other users			

Enhancements by version	U.S. Only	Canada Only	API
New option to approve the removal of employee records			
Version 20.3 enhancements (For details, see the v20.3 Release Notes)			
Ability to view change history in records			
New option for closing purchase orders automatically			
Support for Paya Exchange Desktop 2.0			
Support for customized tables and views			
Ability to use a new window to add client service locations quickly			
Effective rate shown for Sales Tax Districts (U.S. only)	X		
API supports adding and removing attachments			X
API enforces locks			X
Schema change for Global Variables			X
Version 20.2 enhancements (For details, see the v20.2 Release Notes)			
Simplified schedules lookup			
QueryJobCost (API Enhancement)			X
SetExclusive (API Enhancement)			X
Version 20.1 enhancements (For details, see the v20.1 Release Notes)			
More versatile lookup windows			
Unique Payroll record numbers			

Known issues and comments

The following sections describe known issues and problems in Sage 100 Contractor Version 22.1.

General

Compliance and Payroll Checks

Important! The sample check forms that come with Sage 100 Contractor may not be fully compliant with all federal, state, and local laws, and other requirements that can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify check forms as needed to ensure compliance. For information about customizing check forms, see 13-5 Form/Report Page Design in the Sage 100 Contractor help, or contact your Sage business partner for assistance.

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.

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 and Windows 10, 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. Select Sage 100 Contractor **Hosting Framework** on the list, if it is not selected..

> **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 R2, 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\.)

Software and hardware required to support Microsoft SQL Server

Version 22.1 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 98460 for detailed information about supported operating systems and software, and for minimum hardware requirements.

Installation of Microsoft SQL Server on a domain controller is not recommended

Microsoft recommends against installing SQL Server on a domain controller, and does not support SQL Server on a read-only domain controller should you encounter any problems with this configuration.

Because you must install Database Administration on the same machine as SQL Server, you should not install Database Administration on a domain controller. To guard against inadvertent installation on a domain controller and the potential for irrecoverable data losses, you will receive a warning if you attempt to install Database Administration on a machine used as a domain controller .

For more information, see the Microsoft Knowledgebase article https://support.microsoft.com/en-us/kb/2032911.

About .NET Framework

.NET 4.6.1 Framework is required

If Microsoft .NET 4.6.1 Framework is not already installed, it will be installed automatically when you install Sage 100 Contractor. Installation of .NET 4.6.1 Framework alone may take up to 20 minutes per computer.

Make sure that both your client and server computers meet the minimum requirements for installing both Sage 100 Contractor software and .NET 4.6.1 Framework.

> **Note:** If Sage 100 Contractor requires an installation of .NET 4.6.1 Framework, the Sage 100 Contractor installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, you must do so to continue the Sage 100 Contractor installation.

.NET 3.5 is also required

In some situations, you may need to turn on .NET 3.5 manually by selecting the .NET 3.5 check box in the Windows Features dialog box. For more information, see Knowledgebase article ID 68381, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=68381.

Windows Small Business Server 2011 is not supported

Microsoft Small Business Server 2011 does not support .NET Framework 4.6.7, which Sage 100 Contractor (SQL) requires. Unfortunately, this means that Sage 100 Contractor (SQL) cannot support Small Business Server 2011.

Turning on Microsoft .NET 3.5

Microsoft .NET 3.5 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 loaded but not installed, so Sage 100 Contractor does not install it automatically.

If you attempt to install Sage 100 Contractor without .NET 3.5 installed, you 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 has been installed. If you receive the above message during installation, install .NET Framework 3.5., and then reinstall Sage 100 Contractor.

The following instructions are for Windows Server 2008 R2.

To verify that .NET 3.5 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 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.

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 48760. Certain configurations can potentially disable the communication:

- You must enable file sharing on your computers. 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 Advisor Update

> **Important!** Sage Advisor Update is not available until further notice.
>
> You can download Version 22.1 from the Knowledgebase using the link provided in the Software Notice that announced the product download.

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

Integrating your financial and operations system with Paya lets you process check and credit card transactions without storing your customers' sensitive card information in your database. Paya Exchange transmits check and credit card details through a secure connection to Paya, 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.

Using Sage 100 Contractor Intelligence Reporting with Sage 100 Contractor 2019

Sage 100 Contractor Intelligence Reporting versions 20.2 and 19.7 are not designed to work side-by-side.

If you used Sage Intelligence Reporting with Sage 100 Contractor version 19.8 or earlier, follow the steps in Knowledgebase article 75640 when upgrading to version 22.1.

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

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."

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 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.

Windows "Sleep Mode" prevents computers from obtaining a license use

If the computer you are using as a license server goes into sleep mode, other computers on the network cannot 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. In Windows 8.1 Professional, Windows 10, or Server 2012 Standard, click **Start > All apps > Control Panel > System and Security > Power Options**.

    In Windows 7, click **Start > Control Panel > System and Security > Power Options**

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

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

Windows 8.1 Professional and Server 2012 Standard Operating Systems

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.

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.

Solution for Windows 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 \Sage100Con folder, and then select Properties.

3. On the **Sage100Con 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 **Sage100Con 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**].