Sage 100 Contractor 2019 (SQL)

Version 22.2 Release Notes

Canadian and U.S. Editions

September 2019

Contents

U.S. Payroll Tax Tables—September 2019 Update

Payroll tax tables have changed for the following jurisdictions:

- Minnesota
- Virginia

Enhancements in Version 22.2

This section describes the new features and enhancements you will find in version 22.2.

We've Been Listening to You!

We introduce integration with eTakeoff Dimension, as described in the next section.

In version 22.1, we improved how Sage 100 Contractor processes 'use taxes' in the U.S. Some of our customers suggested additional ways to improve this feature, and we've incorporated these suggestions in version 22.2. For more information, see Refinements for 'Use Taxes' under Enhancements for the U.S. Edition.

Integration with eTakeoff Dimension

With version 22.2, Sage is excited to provide integration with eTakeoff Dimension, a feature that many users have been anticipating.

If you have eTakeoff® Dimension® (eTakeoff) installed on the same machine as Sage 100 Contractor, you can grab quantities from eTakeoff and then automatically insert them into the Quantity column in the **9-5 Takeoff Details** grid. (A "grab" refers to getting a value from an eTakeoff blueprint and inserting it in a Sage Estimating estimate.) Alternatively, you can copy a quantity in eTakeoff and then paste it into the Details grid, or simply drag and drop it from eTakeoff to the Details grid.

You initiate a grab from the Quantity column in the **9-5 Takeoffs** window.

To "grab" a quantity from a project in eTakeoff:

1. In the **9-5 Takeoffs** window, display an existing takeoff or start a new takeoff.

2. In the **Details** grid, right-click in the **Quantity** column.
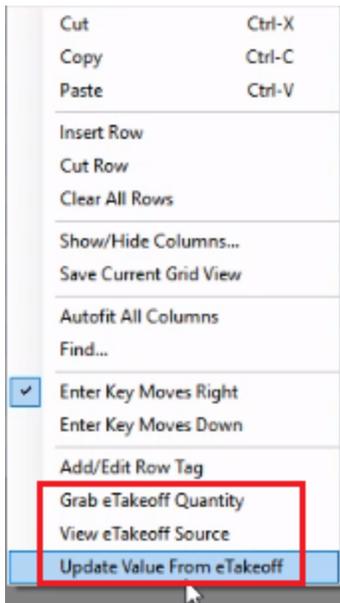
Grab eTakeoff Quantity is one of three eTakeoff-related options that appear on the shortcut menu. If you right-click a quantity that originated in eTakeoff, the **View eTakeoff Source** and **Update Value From eTakeoff** options are available.

3. Click **Grab eTakeoff Quantity**.

   The eTakeoff Dimension program opens.
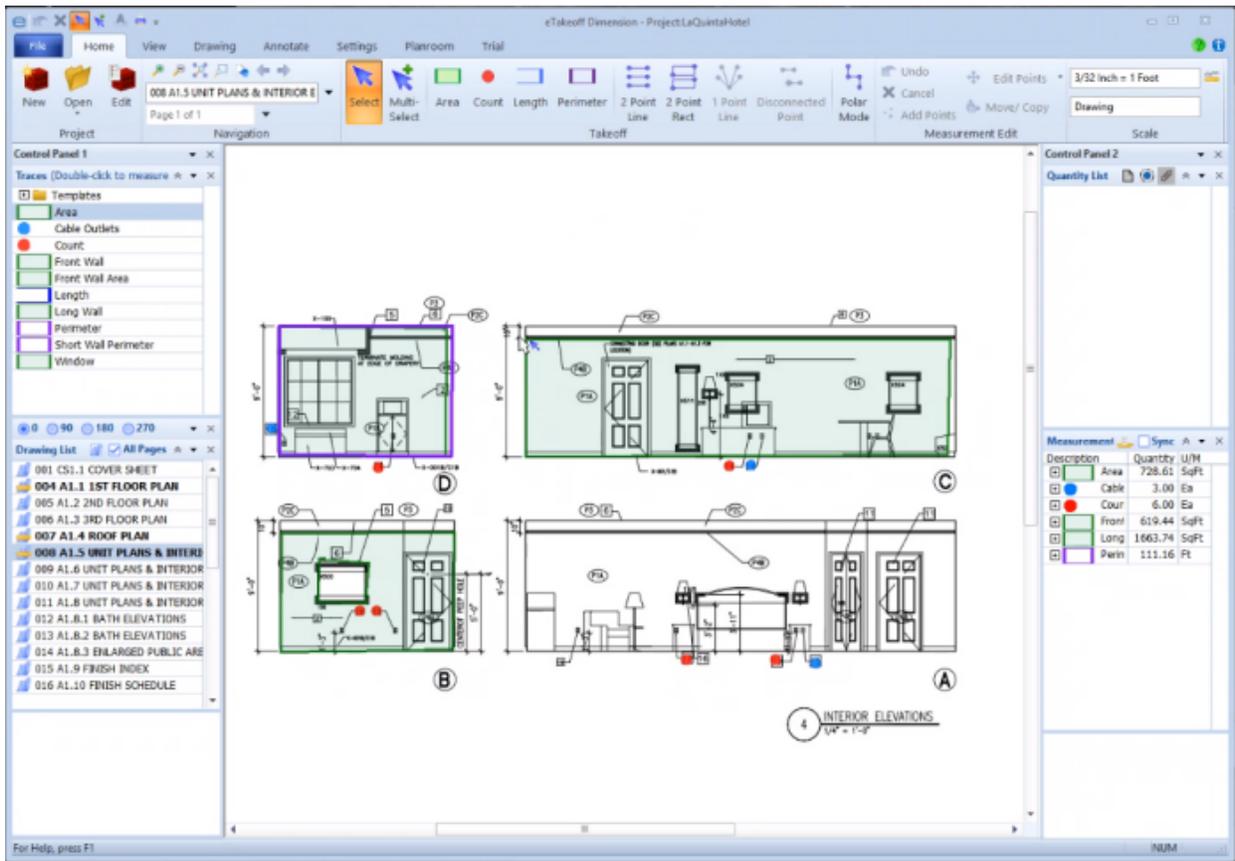
4. In the eTakeoff program:

   a. Open the project, if it is not already open in the eTakeoff program.

   b. Navigate to the item for which you want to grab the quantity, and then right-click it to copy the quantity.

   c. Return to Sage 100 Contractor.

   > **Note:** The item quantity, item description, and unit of measure (where applicable) now appear on the line you selected in step 1. If the selected line was not blank, this information appears on the last line in the grid. Sage 100 Contractor identifies the line with an upward-pointing triangle in the row header.

If an estimate includes quantities that originated in eTakeoff, you can update those quantities easily if they change in the eTakeoff project.

- **To update a single quantity on the Details grid,** right-click the quantity, and then select **Update Value from eTakeoff**.

- **To update the values on the current grid,** click **Update** > **Grid** > **Quantities from eTakeoff**.

- **To update the values for the entire takeoff,** click **Update** > **Takeoff** > **Quantities from eTakeoff**.

When updating quantities, Sage 100 Contractor does not overwrite existing descriptions in the **9-5 Takeoff** grid.

Other Ways to Obtain Values from eTakeoff

Besides the method described in the steps above, you can also:

- Drag and drop objects from eTakeoff onto a row in the **9-5 Takeoffs** grid.

  > **Tip:** Align the eTakeoff project and the **9-5 Takeoffs** window so you can see the blueprint in eTakeoff and the Details grid in Sage 100 Contractor simultaneously.

- In eTakeoff, click **Copy Measurement** and then paste the data into the **9-5 Takeoffs Details** grid.

- In eTakeoff, open the **Measurements List** for an item, right-click, and then paste the quantity in the Quantity column in the **9-5 Takeoffs** grid.

Enhancements for the U.S. Edition

Refinements for 'Use Taxes'

Post use tax expenses to specific expense accounts or allocate them in payable transactions

If your company incurs 'use tax,' you need to consider whether to continue with the 'use tax' treatment established in version 22.1 or to adopt the method we are introducing in version 22.2.

In version 22.1, you had to specify, in the **1-8 General Ledger Setup** window, the 'use tax' expense accounts to which to distribute use tax expenses in the **4-2 Payable Invoices/Credits** and the **4-7-3 Enter Credit Card Receipts** windows.

In version 22.2, you can choose whether to allocate use tax expenses to these specified posting accounts, or to allocate use tax expenses proportionately to the accounts used in the payable transaction.

- If you want to use fixed, specified 'use tax' expense posting accounts (as in version 22.1), you must select the new **Post 'use tax' expense to** check box on the **Posting Accounts** tab of the **1-8 General**

Ledger Setup window. Sage 100 Contractor then allocates use tax expenses to these accounts in the **4-2 Payable Invoices/Credits** and the **4-7-3 Enter Credit Card Receipts** windows.

> **Note:** You can now enter an Administrative Expense account number for the 'Use Tax' overhead cost account. The account is now labeled **O/H and Admin**.

- If you do not select the **Post 'use tax' expense to** option in the **1-8 General Ledger Setup** window, when posting payable transactions that include use tax, you need only to specify the **Use Tax Payable Account**. Then, the use tax amount is allocated proportionately based on the accounts and subaccounts used on the invoice.

Respect sales tax limits set by tax entities

In the **4-2 Payable Invoices/Credits** and the **4-7-3 Enter Credit Card Receipts** windows, Sage 100 Contractor applies any sales tax limit specified for the tax entity (the limit being based on the invoice total).

Support for Equal Employment Opportunity Commission (EEOC) Reports

U.S. companies that meet certain EEOC reporting thresholds must file EEO-1 Component 2 reports for 2017 and 2018 by September 30, 2019 and, providing they continue to meet these thresholds, are required to provide annual reports thereafter. The report provides a demographic snapshot of your workforce, including information about your employees' race, ethnicity, and gender, as well as pay information. (For authoritative guidance on the reporting requirements for the EEO-1 Component 2 report, visit the Equal Employment Opportunity Commission Component 2 website at https://eeoccomp2.norc.org.)

Sage 100 Contractor now supports reporting to the Equal Employment Opportunity Commission (EEOC).

If your company is required to submit a Equal Employment Opportunity-1 Component 2 report, you need to set up your Sage 100 Contractor system as follows:

- In the **7-1 Company Information** window, you use these new EEOC fields to identify your company to the Equal Employment Opportunity Commission:

  - **EEOC Establishment#.** Enter the establishment number that the EEOC provides to your company.

  - **EEOC NAICS Code.** Enter the six-digit NAICS code for your industry.

    For general information about NAICS codes, go to https://www.naics.com/what-is-a-naics-code-why-do-i-need-one.

    To identify your company's NAICS code, search at https://www.naics.com/search.

- In the **5-3-3 Employee Positions** window, you use the new **EEOC Job Category** column to map each

employee position in your Sage 100 Contractor company to a valid EEOC job category. Sage 100 Contractor provides a list of EEOC job categories that you can select, including:

- 1–Exec/Senior Officials & Managers
- 2–First/Mid-Level Officials & Managers
- 3–Professionals
- 4–Technicians
- 5–Sales Workers
- 6–Administrative Support Workers
- 7–Craft Workers
- 8–Operatives
- 9–Laborers and Helpers
- 10–Service Workers

For information about EEOC job categories, visit https://www.eeoc.gov/eeoc/statistics/employment/jobpat-eeo1/glossary.cfm

For a detailed EEOC job classification guide, visit https://www.eeoc.gov/employers/eeo1survey/jobclassguide.cfm

- In the **5-2-1 Employees** window, for employees that are exempt from overtime or are not paid by the hour (so their actual hours worked are not stored in Sage 100 Contractor), select the new **Use proxy hours for EEO-1 reporting** check box. Sage 100 Contractor then counts 40 hours per week worked for each full-time employee and 20 hours per week for each part-time employee when calculating the EEOC report. (The program uses the hire date and the inactive date from the employee record to determine weeks worked for each employee for each year.)

> **Note:** To accommodate the new EEOC fields, we have relocated some of the fields in the **7-1 Company Information** window.

Running the EEO-1 Component 2 report

To submit the EEO-1 Component 2 report, you first use the **5-4-1- Federal Tax Forms and eFiling by Aatrix** window to submit your Sage 100 Contractor data to Aatrix. You then use the Aatrix website to complete the form and submit the report to the EEOC.

> **Important!** If you are submitting the EEO-1 report for the first time, you may have to run the report for 2017 and 2018, in which case you must run the report separately for each year. Note that you may have to open your archive companies and set up pay categories for each archive before you run the reports.

Before running the EEO-1 Component 2 report

- Determine whether your company is required to submit a EEO-1 Component 2 report.

  For authoritative guidance on the reporting requirements for the EEO-1 Component 2 report, visit the Equal Employment Opportunity Commission Component 2 website at https://eeoccomp2.norc.org.

- In the **7-1 Company Information** window, make sure you have specified your company's **EEOC Establishment#** and **EEOC NAICS Code**.

  To identify your company's NAICS code, search at https://www.naics.com/search.

- In the **5-3-3 Employee Positions** window, make sure you have mapped all existing employee positions to valid EEOC job categories.

  For a detailed EEOC job classification guide, visit https://www.eeoc.gov/employers/eeo1survey/jobclassguide.cfm

- In the **5-3-1 Employees** window, make sure you have selected the **Use proxy hours for EEO-1 reporting** check box for salaried full-time and part-time employees. In addition, make sure each employee record includes entries in the **Gender** and **Heritage** boxes.

- In the **5-4-1- Federal Tax Forms and eFiling by Aatrix** window, if the EEO-1 Component 2 report is not listed, use the **Options** menu to update the report forms.

To run the EEO-1 Component 2 report:

1. Open the **5-4-1- Federal Tax Forms and eFiling by Aatrix** window.

2. Select the **EEO-1 Component 2 report** form.

3. In the **Year** box, select the year for which you are running the report.

4. Click [**Run Report**].

5. In the Aatrix **Report Pay Period** window:

   a. Select the pay period you want to use as the basis for the report.

   b. Click [**OK**].

6. Follow the instructions on the Aatrix website to complete any missing information and to submit the report.

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!

Sage Construction Anywhere (SCA) Retirement

As of September 30, 2019, Sage is retiring Sage Construction Anywhere (SCA), and you will no longer have access to it.

Contact your Sage business partner to learn about alternative solutions.

Fixes in Version 22.2

Fixes in both editions

Version 22.2 includes the following software fixes in both the U.S. and Canadian editions:

- When you mark a subaccount **Inactive** in the look up window, Sage 100 Contractor no longer makes inactive all subaccounts that have the same record number in all control accounts.

- You can now save and post journal transactions and payable invoices that have equipment expenses with a net zero cost.

- Over budget warnings now take into account negative values. (For example, say you set a budget for $100 for a particular job and cost code, and set an over budget warning with no tolerance. Now, you no longer receive a warning if you post a purchase order that has a net amount of $100, but the detail lines are for $125 and -$25.)

- The **5-2-8-51 Timecard Journal~Long** no longer truncates the number of hours or pieces.

- When you copy and paste an existing part record to create a new part record, Sage 100 Contractor no longer copies over the irrelevant Average Cost of the original part. The Average Cost field in the new record is now blank, as it should be.

- The **5-5-3-21** and **5-5-3-26 Daily Labor Reports** now correctly list employees under each day.

- When you run the **6-1-7-31 Over/Under Billings** report using the Job criteria, the report no longer includes all jobs .

- In the **6-4 Change Orders** window, you are now prompted to save the change order when *all* you have done is accept the grid default by pressing [**Enter**].

- The **8-3 Equipment Costs** and **8-3 Equipment Revenue** windows no longer display void records.

- Two users working with the same record in the **11-2 Work Orders/Invoices/Credits** window can no longer both post the record, causing a double posting and an audit error.

- Job costs are allocated properly in the **12-2 Inventory Allocation** window, even when there is only a WIP account and no direct expense account in the grid. In addition, the program now displays the Ledger Total in the **Job Costs** window.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- We have updated the labels on postal code fields to say **Postal Code** (rather than Postal).

- Canadian tax is now reversed properly when you reverse a **3-7 Progress Billing** or a **3-9 Unitary Billing** application.

Fixes for the U.S. Edition

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

- The **5-4-2 Quarterly Tax Report** for Washington State (form 5208 A) no longer includes wages or hours paid as sick leave.

API for third-party developer products

- We have changed the logging process so that third-party applications no longer keep processes open even after the application has closed. Previously, this issue prevented users from opening a company with exclusive access.

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 22.1 enhancements (For details, see the v22.1 Release Notes)			
Command-level security for many options and Post commands			
Ability to save final reconciliations for later access			
Ability to transfer amounts between bank accounts			
Warning when posting an AP invoice with no subcontract			
Ability to view Sage messages in Sage 100 Contractor			
Job templates to use and reuse in takeoff			
Ability to report on use taxes	x		
New payroll type for retiring allowances		x	
Several additional customer-requested enhancements			
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)			

Enhancements by version	U.S. Only	Canada Only	API
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			
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)			

Enhancements by version	U.S. Only	Canada Only	API
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			
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			

Enhancements by version	U.S. Only	Canada Only	API
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			
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)			

Enhancements by version	U.S. Only	Canada Only	API
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 22.2.

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 22.2 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.

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 22.2.

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**].