

# **Sage 100 2021.1**

## What's New

June 2021

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# Chapter 1

## Introduction

This document describes the enhancements included in Sage 100 2021 and subsequent updates. For additional user guides, including the Sage 100 2021 Installation Guide and Upgrade Guide, visit the Sage 100 documents page at: <http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm>

**Depending on your purchase agreement, some features described here may not be available in your product.**

# Chapter 2

## What's New in Version 2020.1

Sage 100 2020.1 includes program fixes. For details, see the [Sage 100 2021.1 release notes](#).

# Chapter 3

## What's New in Version 2021

This chapter describes the enhancements added in Sage 100 2021. Global changes are listed first, followed by module-specific changes, any updates to Office 365 integration, and then retired features.

### Global Changes

The following changes are carried throughout multiple modules.

#### Company Types

You can now see at a glance whether the current company is live, a demo, and so forth. After selecting types for your companies in Company Maintenance and setting up display preferences in System Configuration, you can see the type in the title bar of your task windows.

#### Type Field in Company Maintenance

A Type field has been added in Company Maintenance. You must select one of the following options: Live, Archive, Demo, Test.

When you upgrade from an earlier version of Sage 100, Live is automatically selected for all companies that are converted, but you can change the type if needed.

When you install demo data, Demo is automatically selected as the company type.

#### Display Options in System Configuration


On the Preferences tab in System Configuration, check boxes for each company type have been added in the Display Company Type in Windows Title Bar section.

Select one or more of these check boxes to display the company type after the company code in the title bar for task windows.

For example: Customer Maintenance (ABC - Demo) 5/31/2025

#### Security Option to Delete or Overwrite Companies

A new security option has been added in Role Maintenance. If the Allow Delete/Overwrite Live and Archive Companies check box is selected, the applicable users will be able to delete or overwrite companies with Live or Archive selected as the type. A message appears to confirm the intention to delete or overwrite the company.


 We're listening! This idea was a suggestion on the [Sage 100 ideas site](#). Visit the ideas site to share your ideas and vote for your favorites.

## Check Number Field Expanded

The check number field has been expanded to hold 10 characters. Task windows, forms, and reports have been updated to reflect this change.

This enhancement was carried throughout the following modules:

- Accounts Payable
- Bank Reconciliation
- General Ledger
- Payroll (requires Sage 100 Payroll 2.21 or later)
- Purchase Order

 We're listening! This idea was a suggestion on the [Sage 100 ideas site](#). Visit the ideas site to share your ideas and vote for your favorites.

## Select Which User Identifier to Display

A User Display Option field has been added to the Preferences tab in System Configuration. Use this field to select which user identifier appears in various locations throughout Sage 100, including report footers, the Activity Log, and so forth. The following options are available:

- User Logon
- Name
- User Code (the default selection)
- E-mail Address

User Logon is the default selection.

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

## 64-Bit Version of Sage 100

A 64-bit version of Sage 100 is now available. When running the Sage 100 installation wizard on a computer with a 64-bit version of Windows, you'll have the option to install either the 32-bit version or the 64-bit version.

**Warning!** After installing the 64-bit version of Sage 100, any 32-bit versions installed on the same computer will no longer work.

**Warning!** If you install the 64-bit version of Sage 100 then only workstations with the 64-bit version of Windows will be able to run Sage 100.

If you're installing Sage 100 on a computer with a 32-bit version, you can install the 32-bit version of Sage 100 2021, and then run the Sage 100 32-bit/64-bit Switch Utility Wizard after you've converted your data and completed your testing. This utility converts your 32-bit version of Sage 100 2021 to 64 bit.

If necessary you can also use the utility to convert from the 64-bit version of Sage 100 to the 32-bit version.



For more information, see [Converting to 64-bit Version of Sage 100](#) on page 121.

## Payment Center Rebranding

Paya (formerly known as Sage Payment Solutions) has retired the Payment Center website and replaced it with the Paya Exchange website. Labels within Sage 100 have been changed from Payment Center to Paya Exchange.

Credit card and ACH payment processing work flows have not changed. Paya Desktop Connect has replaced Sage Exchange Desktop as the locally installed application that is required.

## Edge Used for Embedded Browser

Microsoft Edge is now used as the embedded browser in the Sage 100 Desktop if you have a version of Edge installed that was released on or after January 15, 2020.

Edge is a more modern browser that delivers better page rendering and performance.

## Map Sage 100 Users to Sage ID Accounts

A User Merge Utility has been added to the Administrative Tools window to help you map user records created in the Sage Provisioning Portal to user records created in Sage 100.

Use this utility when you're migrating data from an on-premises version of Sage 100 to one in the Sage Partner Cloud. For more information, see [User Merge Utility](#) in the help.

## Accounts Payable

The following changes were made in the Accounts Payable module.

### Form 1099-NEC Option in Form 1099 Tax Reporting

Nonemployee Compensation has been added to the Form Type list in Form 1099 Tax Reporting.

### A/P Open Invoices Paid Today Utility

An Open Invoices Paid Today Utility has been added to the Sage 100 Utilities menu available from the Run Program window. Use this utility to ensure that the Paid Today field in the Open Invoice file is set correctly when related records are missing due to power loss or some other unusual circumstance. You can schedule the utility to run automatically using Task Scheduler.

## Accounts Receivable

The following changes were made in the Accounts Receivable module.

### Use Original or Current Cost When Applying Credit Memo

When applying a credit memo to an invoice in Invoice Data Entry, you have the option to recall Accounts Receivable invoice information from history. This option is available if Yes or Summary is selected in the (Invoice History) Retain in Detail field in Accounts Receivable Options.

After you enter an invoice number, a message asks if you want to copy invoice information from history.

If Yes is selected in the (Invoice History) Retain in Detail field, line details are included. If Summary is selected only the invoice header information is used.

If you click Yes to use information from the history files, a second message asks if you want to recall the item cost from history. You can click the Details button in the message window to view the cost information from both history and inventory for each item on the invoice. Check with your accountant about the appropriate costing method for returned inventory.

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

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

### Settings Saved When Creating Form Code in A/R Invoice Printing

When you save a new form code in A/R Invoice Printing, all of the settings are now saved. Previously only the Paperless Office output setting was saved.

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

## Bank Reconciliation

The following changes were made in the Bank Reconciliation module.

### Exclude Wire Transfers from Positive Pay Export

When running the Positive Pay Export Wizard, you can specify whether to include wire transfers when the file is created.


## Custom Office

The following changes were made in the Custom Office module.

### Select Role When Adding UDT to UDT Maintenance

When adding a UDT to the UDT Maintenance menu, you no longer need to access Role Maintenance to set up security for the UDT task.

In User-Defined Field and Table Maintenance, when you click the Add UDT to Desktop button, the Menu Wizard now starts. The Select Roles page in the wizard allows you to specify which roles will have access to the UDT task.

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

### Two-Line Column Descriptions

You can now create two-line column descriptions for customized grids. In the Column Properties window, insert a carriage return token ( <CR> ) to create a line break in a column description.

Only one line-break is allowed in the description. In a dual-grid panel with no column description for the secondary grid, the description displays in one row when the column is moved from the primary grid to the secondary grid.

## Fixed Assets

The following enhancements were added to the Fixed Assets module.

### Update in Period End Processing

The posting book check boxes in the Period End Processing window have been replaced by a grid with Book Name and Close Book columns. The Close Book column contains check boxes that you can select for the books that you want to process for period end.

The change was made to support the additional posting books added in Sage Fixed Assets version 2021.

## Inventory Management

The following changes were made in the Inventory Management module.

### Default Date Range for Transactions

You can select a default date range for the Transactions tab in Item Maintenance and Item Inquiry.

The default date range is based on the selection in the Transaction Date Search Default Selection field that has been added to the Additional tab in Inventory Options.

When viewing the Transactions tab, you can change the default date range by clicking the Search button and entering different criteria in the Transaction Date row.


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

## Library Master

The following changes were made in the Library Master module.

### Role Security Enhancements

Several security-related enhancements have been made to simplify the security setup process.

 We're listening! Many of these ideas were suggestions on the [Sage 100 ideas site](#). Visit the ideas site to share your ideas and vote for your favorites.

**Note:** Unless otherwise noted, these features are available if you purchased Sage 100 through a subscription plan.

### Security Menu

A Security Menu has been added to the Library Master module. This menu includes the tasks listed below. Some tasks are new and some were relocated from other menus.

- Administrator Tools
- Export Roles (subscription only)
- Import Roles (subscription only)
- Role Maintenance
- Role Report
- Role/User Inquiry (subscription only)
- User Maintenance
- User Report

**Note:** The Security menu is available for both subscription and non-subscription versions of Sage 100. However, some tasks are available only in the subscription version.

### Role Maintenance Enhancements

The following changes were made in Role Maintenance.

#### Role Types

A Type field has been added with types such as Admin, Auditor, Employee, and so forth. You'll be required to select a type when creating new roles. Existing roles created in earlier versions of Sage 100 will automatically have Converted as the selected type, but you can change it.

**Note:** The Type field is available for both subscription and non-subscription versions of Sage 100.

### **Role Templates**

When creating a role, you can click Copy and then select one of several predefined role templates. Templates have been added for most modules and are available based on which modules are installed.

To view a detailed list of permissions available with each role template, print the Role Report and select Role Template Details in the Type of Report to Print field. You can also view an existing template in Role Maintenance by clicking the Role Template List button and selecting a template.

### **Task Tab**

On the Tasks tab, you can sort the module list alphabetically or by the default menu order. When the modules are sorted alphabetically, the subcategories are still sorted using the default menu order.

The security alias feature has been removed for various tasks. For example, Item Inquiry appears on the Sales Order Inquiries menu. In earlier versions of Role Maintenance, you would have to go to the Inventory Management section to grant access to Item Inquiry in the Sales Order module. Item Inquiry is now included in the Sales Order section.

### **Security Options**

Security events and module options have been combined onto one tab in Role Maintenance, and they are now referred to as Security Options.

On the Security Options tab, you can sort by module, group, or security option. When you sort by group, the security options are still organized by module, but there are subcategories such as Batches, Data Entry, and so forth.

Help text for the selected security option is displayed at the bottom of the window.

### **Filtering Role Settings**

A Filter button has been added in Role Maintenance. Click this button to open the Filter Role Settings window, which you can use to filter the information that appears in the tree view on the various tabs.

This window provides several filter options, such as by module and menu group. You can apply the filter to all tabs or certain ones.

### **Applying Role Changes to Other Roles**

After making a change to a role, you can click the Apply button to open the Apply Role Changes window. In this window, you can select which changes to apply and to which roles they should be applied.

### **Assigning Users to Roles**

Click the Assign button to open the Assign Users to Role window. Use this window to assign the current role to users in some or all companies.

### **Removing Users from Roles**

Click the Remove button to open the Remove Users from Role window. Use this window to remove users from the current role.

### **Importing and Exporting Roles**

Click the Import and Export buttons to import and export roles. You must click the buttons before selecting a role.

When you export roles, they are exported to the file and location that you specify. When you Import a role, you can select which of the roles included in the import file that you want to import.

### **Role Report Enhancements**

When printing the Role Report, you can select Role Template Details in the Type of Report to Print field to view a list of all permissions available for one or more role templates. A Role Template field has been added to the Selections grid.

The Include Tasks and Events with No Access check box that was added in the 2020.1 update has been replaced with an Include Tasks and Options field. Use this field to specify whether to print tasks and security options for which the role has access, no access, or both.

Options for sorting tasks and security options have been added.

The role type now prints on the report for both subscription and non-subscription plans.

### **Exclude Role Option in User Maintenance**

An Exclude check box has been added to the Maintenance tab in User Maintenance. Use this check box if you've assigned a role to a user for all companies, but want to exclude them from the role in specific companies.

### **User Report Enhancements**

The Include Tasks and Events with No Access option that was added in the 2020.1 update has been replaced with an Include Tasks and Options field. Use this field to specify whether to print tasks and security options for which the user has either access, no access, or both.

Options for sorting tasks and security options have been added.

### **Role/User Inquiry**

Role/User Inquiry has been added to the Security menu. Use this task to select a role, user, task, or security option and view related information about the selected item. The information is displayed in a tree view and can be exported to Excel.

### **Maintain Default Form Codes**

A new task, Default Form Maintenance, has been added to the Library Master Setup menu.

Use this task to:

- Maintain default form codes by company and role or individual user.
- Select a template for Standard form codes if there is no template already associated with the code.
- Prevent users from changing the default form code within the form tasks.

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

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

## Copy Custom Forms, Custom Reports, and Settings

When copying a company in Company Maintenance, you have the option to copy form and report settings, default form selections, custom forms, and custom reports.

Select the Forms check box to copy the form settings, default form selections, and custom forms from the source company to the destination company.

Select the Reports check box to copy report settings and custom reports from the source company to the destination company.

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

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## Build Search Index for Specific Company Types

When running the Build Search Index utility for the advanced auto-complete feature, you can now specify which company types to index.

In Task Scheduler, you can specify the company type codes in the Run Time Arguments field, which has been added to the Tasks tab. This new field appears when Build Search Index is selected in the Task field.

## Access Administrative Tools

You can now access the Administrative Tools window from the Library Master Main menu.

## OAuth Authentication for SMTP Mail Server

On the E-mail tab in Company Maintenance, you can now select between two authentication methods to use when connecting to the SMTP server:

- Basic: This option works the same as earlier versions of Sage.
- OAuth (Open Authorization): This new option is an open standard authorization protocol used to grant access using access tokens instead of sharing a user name and password.

If you're going to use the OAuth method, you will need to obtain your OAuth client credentials from your authenticating application, such as those offered by Microsoft and Google. To learn more, visit [oauth.net](https://oauth.net).

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

## ACA PII Worktable Available in Report Manager

When adding a Payroll report using the Report Manager wizard, you have the option to include the ACA PII (personally identifiable information) worktable in the report.


## Paperless Office

The following changes were made in the Paperless Office module.

### Default Delivery Options

A new Default Delivery Options task has been added to the Paperless Office Setup menu. Use this task to make default form selections that are automatically set in the Paperless Office Delivery Options window when creating a new customer or vendor record. You can change the defaults if needed.

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

 We're listening! This idea was a suggestion on the [Sage 100 ideas site](#). Visit the ideas site to share your ideas and vote for your favorites.

### Electronic Delivery Log

An Electronic Delivery Log button has been added to the following tasks:

- Customer Viewer
- Vendor Viewer
- Employee Viewer
- Journal and Register Viewer
- Period End Reports Viewer
- Report Viewer

Select a document and then click this button to view the most recent date and time that the document was sent, the user logon of the person who sent it, the status of the submission attempt, and the recipient's email or fax number.

Click the Electronic Delivery Submissions List button to view a list of all attempts to send the document.



## View List of Documents That Have Been Sent

Two inquiry tasks have been added to the Paperless Office Main menu:

- Customer Electronic Delivery Inquiry
- Vendor Electronic Delivery Inquiry

Use these tasks to view a list of documents that have been sent to customers and vendors.

You have several options for filtering the list, including the delivery type and status. The status reflects whether emails were successfully submitted to the SMTP server and whether faxes were successfully submitted to the fax server.

You can resend the documents from the list box or export the list to Microsoft Excel.

**Note** These features are available if you purchased Sage 100 through a subscription plan.

 **Your Sage 100 business partners at work!** These ideas were a suggestion from 90 Minds, Inc. where *“More Minds Are Better Than One.”*

## Email Additional Salespeople

When sending forms to customers, you can also send them to all salespeople who are receiving a commission on the sale.

To enable this feature, select the E-mail Add'l Slspn check box that has been added to the Paperless Office Delivery Options window accessed through Salesperson Maintenance. You can enable the feature for:

- Statements
- Sales orders
- Sales Order invoices

## Document Lookup in Paperless Office Delivery Options

A Document Lookup button has been added next to the Document field in Paperless Office Delivery Options. Click the button to view a list of forms that have been set up for the selected customer or vendor.

## New Options for Associated Documents

You are no longer limited to PDF files when associating documents with journals and registers. Any document type can be associated, including Word documents, Excel workbooks, images, and so forth. Field labels in various windows have been updated to reflect the change.

In the Journal and Register Viewer, you can click the Edit Associated Document button to:

- Select a different document to associate with the journal or register.
- Add a document if none was previously associated.

- Remove an associated document.

The button is available based on a new security option, Allow Editing of Associated Document for Journal and Register PDF Documents.


## Documents are Updated Only If Printed and Sent

Forms are no longer flagged as updated when they are printed as PDFs but not electronically delivered due to an interruption in the process.

Previously when the printing and delivery process was interrupted, forms were sometimes flagged as updated when they were printed but not sent.


This update affects the following forms:

- Accounts Receivable Invoice Printing
- Job Cost Invoice Printing
- Purchase Order Printing
- Return Order Printing
- Customer RMA Printing
- RMA Receiver Printing
- Sales Order Printing
- Sales Order Invoice Printing

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

## Purchase Order

The following changes were made in the Purchase Order module.

 **Your Sage 100 business partners at work!** These ideas were suggestions from 90 Minds, Inc. where “*More Minds Are Better Than One.*”

## Purchases Clearing From History Report

The Purchases Clearing From History Report has been added to the Purchase Order Period End Processing menu.

Unlike the Purchases Clearing Report, you can run this report after running period end processing, so you can get the information needed to reconcile the purchases clearing account at any time.

## Invoice Lines Added in Receipt History Inquiry

When viewing a receipt of invoice record in Receipt History Inquiry, the invoice lines now appear on the Lines tab.

## Invoice Lines Added to Receipt History Report

Line details from receipt of invoice records are now included on the Receipt History Report when you select the Print Line Information check box if you're retaining history in Purchase Order Options.

## Drill Down Options in Purchase Order Entry and Inquiry

Two drill-down buttons have been added to the Totals tab in Purchase Order Entry and Purchase Order Inquiry.

A **Receipt History Inquiry** button has been added next to the Last Receipt Date field. If one or more receipts exist for the purchase order, you can click the button to view the receipt(s).


An **Invoice History Inquiry** button has been added next to the Last Invoice Date field. If one or more invoices exist for the purchase order, you can click the button to view the invoice(s).

**Note:** During data conversion, the program attempts to populate the P/O Receipts History Detail file using line detail from the A/P Invoice History Detail file for existing Receipt of Invoice Records. However, the line detail will not be populated if the line detail does not exist in the A/P file.

## Form 1099-NEC Option Available

You can select the 1099-Nonemployee Comp form when entering a document in the following tasks:

- Purchase Order Entry
- Receipt of Goods Entry
- Receipt of Invoice Entry
- Return of Goods Entry

 We're listening! This idea was a suggestion on the [Sage 100 ideas site](#). Visit the ideas site to share your ideas and vote for your favorites.

## Sales Order

The following changes were made in the Sales Order module.

### Suppress Prompts in Daily Sales Reports/Updates


You can now suppress the prompts that ask you to print the reports listed below when printing from Daily Sales Reports/Updates. The reports will print automatically.

- Daily Sales Recap Reports
- Gross Profit Journal
- Shipping Exception Report
- Job Transaction Journal
- Daily Back Order Report
- Daily Deposit Recap

To automatically print the reports without prompts, go to Sales Order Options and, on the Printing tab, select the Automatically Print All Additional Reports That Apply check box.

The reports listed above are available based on how the Sales Order module is set up.

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

 **Your Sage 100 business partners at work!** These ideas were suggestions from 90 Minds, Inc. where “*More Minds Are Better Than One.*”

## Use Original or Current Cost When Applying Credit Memo

When applying a credit memo to an invoice in Invoice Data Entry, you have the option to recall invoice information from history. This option is available if Yes or Summary is selected in the (Invoice History) Retain in Detail field in Accounts Receivable Options.

After you enter an invoice number, a message asks if you want to copy invoice information from history.

If Yes is selected in the (Invoice History) Retain in Detail field, line details are included. If Summary is selected only the invoice header information is used.

If you click Yes to use information from the history files, a second message asks if you want to recall the item cost from history. You can click the Details button in the message window to view the cost information from both history and inventory for each item on the invoice. Check with your accountant about the appropriate costing method for returned inventory.

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

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## Visual Integrator

The following changes were made in the Visual Integrator module.

### Options for Managing Log Files

A Setup menu has been added to the Visual Integrator module. Visual Integrator Options has been added to the menu.

In Visual Integrator Options you can manage the log files that are generated when running import and export jobs and when automatically scheduled jobs are run.

You can specify whether to reuse the existing log files when jobs are run or create new ones. You can also select the location where log files are saved.

## Visual Process Flows

Visual Process Flows are now based on HTML5 instead of Adobe Flash. The new visual process flows feature a blue and white color scheme and new images. Some images are no longer available.

Tool tips no longer appear when hovering over an icon. Instead you must click the icon to see the tool tip. If a visual process flow had multiple tool tips, they have been combined.

By default, tool tips, print options, report options, and inquiry selections are shown. After opening a visual process flow, click twice on an icon to hide the corresponding information. After you've hidden the information, you can click once to show it or hide it again.

If you've created custom visual process flows in earlier versions of Sage 100, they will still work, with the exception of the show/hide functionality. However, you should review them because adjustments may be needed.

The editor for customizing visual process flows has been redesigned.

## Office 365 Integration

A new task, Self Service Invitations, has been added to the Office 365 Integration menu in the Library Master module. Use this task to send email invitations to employees so that they can start using the employee self service features.

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

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