Sage 100 2023

What's New Guide

April 2025

Contents

Contents

What's New in Sage 100

This document describes the enhancements added in Sage 100 version 2023 and subsequent updates. Changes to the Sage 100 Desktop are listed first, followed by global changes, module-specific changes, and then a list of features that are now available for the non-subscription version of Sage 100.

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

What's New in Version 2023.5

The following enhancements were added in update 5 for Sage 100 2023.

Production Management

The following changes were made in the Production Management module.

Option to Relieve WIP on Last Completion

On the Production Management Options Entry tab, the Relieve WIP on Last Completion check box has been added. Select it to post remaining WIP to the inventory account when the work ticket is completed.

Sage Supply Chain Intelligence (SSCI) Integration – Available Fall 2025

Integrate Sage 100 with Sage Supply Chain Intelligence (formerly known as Anvyl) for powerful purchase order management. SSCI bridges the gap between issuance of a purchase order and receipt of goods, providing a cloud-based way to collaborate with suppliers, consolidate shipments, create custom P/O workflows, and even create and edit purchase orders, and have the data flow back into Sage 100.

Use the Sage Supply Chain Intelligence Setup app to perform integration for Sage 100 2025, 2024.2, and 2023.5.

For instructions, see Set Up Sage Supply Chain Intelligence (Anvyl) Integration in Sage 100 help.

What's New in Version 2023.4

The following enhancements were added in update 4 for Sage 100 2023.

Accounts Payable

The following change was made in the Accounts Payable module.

1099 Form Changes for Individuals

To support 1099 Form changes for individuals, the following fields have been added on the Vendor Maintenance Additional tab and print on the Vendor Listing:

- (1099 Form) First Name
- (1099 Form) Middle Name
- (1099 Form) Last Name

These fields are available only when Individual is selected in the Vendor Type field.

Inventory Requirements Planning

The following changes were made in the Inventory Requirements Planning module.

Explode Bill without Production Management Integration

You can now explode parent and component items on a multi-level bill even if Inventory Requirements Planning is *not* integrated with the Production Management module. The Bill of Materials module must be set up for the current company to explode items.

Consolidate Demands

Demands are now consolidated for the same item when creating a work ticket or purchase order to stock. This enhancement allows you to create one work ticket or purchase order for multiple demands on the same item, instead of creating a separate work ticket or purchase order for each demand. Demands for the same item are consolidated automatically if the item's procurement type is Make to Stock or Buy to Stock.

In addition, the following changes have been made:

- In the Item Detail window, the default selection in the Make To field is now based on the item's procurement type.

- In the Items to Produce/Items to Purchase window:

    - You can now increase the production/purchase quantity beyond the quantity recommended.

    - If an item has a price level set and you change the production/purchase quantity, the Unit Cost field is updated accordingly.

    - When creating a work ticket or purchase order to stock, IRP will use the earliest demand date as the date required.

Option to Explode Phantom Bills

The Include Phantom Bills check box has been added in Inventory Requirements Planning Options. You can select this check box to explode the components of the phantom bill onto the level of the bill where the phantom bill appears.

Library Master

The following change was made in the Library Master module.

Sage Connect Integration

You can integrate Sage 100 with Sage Connect, an application built on Sage Network platform. This integration enables a one-way push of data from a Sage 100 company to Sage Connect.

Use the Sage Network Setup app to perform integration. This application will be available shortly as a separate installer. Contact your Sage partner.

For instructions, see Set Up Sage Connect Integration in Sage 100 help.

When a Sage 100 company is integrated with Sage Connect, the Enable Sync for Sage Connect check box is selected by default on the Company Maintenance Payment tab.

Production Management

The following change was made in the Production Management module.

View Quantity Remaining in Materials Where-Used Inquiry

A new Quantity Remaining column (displaying the quantity required minus the quantity issued) has been added in the Materials Where-Used Inquiry window.

In addition, if the selected item is the parent of a work ticket, the following changes have been made:

- Description column displays "Parent Item Code"
- Step Number, Activity Code, and Work Center columns are blank
- Due Date column displays the work ticket production due date

Sales Order

The following change was made in the Sales Order module.

Apply General Ledger Account to Credit Memo

When creating a sales order credit memo and recalling the invoice from history, the new Apply to Credit Memo window appears. You can select to apply either the general ledger sales account from history or the sales return account to the credit memo.

What's New in Version 2023.3

The following enhancement was added in update 3 for Sage 100 2023.

Inventory Requirements Planning

The following change was made in the Inventory Requirements Planning module.

Regenerate IRP Data

> **Important!** If you're upgrading from Sage 100 2023.2 or earlier, you must regenerate your IRP data file to apply the latest schema changes and fixes. Improvements have been made to correctly link components back to parent items, particularly when the same subassembly appears on a bill of material multiple times.

Production Management

The following change was made in the Production Management module.

Include Materials From Option

The Include Materials From field has been added in Cost Roll-Up Register, enabling you to determine if materials from the bill, work ticket template, or both bill and template are included when calculating the cost of the bill.

What's New in Version 2023.2

The following enhancements were added in update 2 for Sage 100 2023.

Development Studio

The following change was made in Development Studio.

Primary and Secondary Buttons

With the implementation of Themes in Sage 100, each button on an application screen is categorized as either a primary button or a secondary button.

A new keyword and value "IgnoreTheme=YES" can be placed in the Tag field to override the attributes assigned to a control by the current active theme. When this keyword and value are found, the attributes from the definition of the control in the library file will be used instead.

Production Management

The following changes were made in the Production Management module.

Option to Summarize Material Lines in Work Ticket Entry

The Summarize Material Lines by Step and Item check box has been added in Production Management Options, allowing you to summarize material lines with the same item number, step number, and scrap percentage on one line in Work Ticket Entry.

Also, the Combine Material Line Item Comments check box has been added. You can select this check box to combine all unique comments from summarized material lines at the Comment field on the Work Ticket Entry Materials tab.

Edit Start and End Times in Labor Entry

You can now edit start and end times in Labor Entry if Only capture, no edit allowed is selected at the Capture Start/End Times field in Production Management Options and the Role Maintenance security option **Allow Full Access to Labor Entry** is selected.

What's New in Version 2023.1

The following enhancements were added in update 1 for Sage 100 2023.

Global Changes

The following enhancements were added throughout multiple modules.

Next Lot Number button

The Next Lot Number button has been added in Lot/Serial Number Distribution. Click the Next Lot Number button to use the next automatically incremented lot number entered at the Next Lot/Serial Number field in Item Maintenance. This enhancement is carried throughout the following modules:

- Bill of Materials
- Inventory Management
- Purchase Order
- Production Management
- Return Merchandise Authorization
- Sales Order

Work Ticket to Purchase Order Post-Conversion Link Utility

The Work Ticket to Purchase Order Post-Conversion Link Utility has been added to the Sage 100 Utilities menu available from the Run Program window. Use this utility to update existing work order links on open purchase order detail lines and match the links to their corresponding open work tickets.

The utility analyzes work order data and provides recommended actions. After running the utility, results are recorded in the System Activity Log.

What's New in Version 2023

Sage 100 Desktop Changes

The following changes were made to the Sage 100 Desktop.

Information Center Page

A new Sage 100 Information Center page has been added, providing dynamic content and announcements for you.

Recent Tab Added to the Ribbon

The Recent tab has been added to the ribbon, showing tasks that have been accessed from the File menu, Home tab, Web Content tab, and Modules tab. On the View tab, you can set how many recent items to show. You can also hide the Recent tab by right-clicking the ribbon and clearing Show Recent in the Ribbon.

Expanded Tooltips

Expanded tooltips now show where tasks are located. For example, hovering over Company Maintenance displays the tooltip **Located in the Library Master Main menu**.

Active Tab on the Ribbon Persists

The last tab accessed on the ribbon persists after exiting Sage 100. For example, if the Favorites tab was the last tab used when you exited Sage 100, it will be the active tab the next time you log in.

Global Changes

The following changes are carried throughout multiple modules.

Installation Simplification

In version 2023, Sage 100 has been consolidated into a single product with three installation approaches. The option to install Sage 100 Standard, Sage 100 Advanced,

and Sage 100 Premium has been removed. Instead, during installation you will have the option to select the architecture to use (**Stand-Alone or LAN** or **Client/Server**). If you select the Client/Server architecture, you will be prompted to select the database to use (**ProvideX** or **Microsoft SQL Server**).

Also, the following installation changes have been made:

- On the Sage 100 Integration Engine Service screen, a Skip button has been added. If you're not integrating Sage 100 with Sage CRM, you can click Skip to bypass configuring the Integration Engine.

- On the Productivity Applications screen, the **Configure Sage 100 Integration Engine** option has been added.

Select Serial Numbers by Range

The Select Serial Numbers by Range button has been added in Lot/Serial Number Distribution. You can select serial numbers using a range instead of scrolling through a list to find the starting and ending serial numbers. This enhancement is carried throughout the following modules:

- Bill of Materials

- Inventory Management

- Purchase Order

- Production Management

- Return Merchandise Authorization

- Sales Order

  💡 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the Sage 100 ideas site.

Default Years to Retain History

In module options tasks in which you can specify how many years to save history, the default setting is now nine years. The minimum required number of years to retain history has not changed, and this update will not affect your existing settings.

Activity Log Updates

When the Accounts Payable Remove Inactive Vendors utility and the Accounts Receivable Remove Inactive Customers utility are run, the Activity Log is updated with a list of inactive vendors and customers removed.

Image Viewer

The Image Viewer in Item Maintenance and Miscellaneous Item Maintenance has been updated so that you can delete an image when you have the appropriate security set up. The delete feature is available based on the new security option in Role Maintenance, **Allow User to Delete Image Files with the Image Viewer**.

iShip Replacement

The iShip tracking tool has been replaced. In data entry tasks, when you click the Tracking button, the tracking ID will now be used to determine which carrier the package belongs to and you will be redirected to the appropriate site. The carriers handled automatically are USPS, UPS, FedEx, DHL, and OnTrac. If the package ID does not belong to one of these carriers, you will be redirected to a Google search with the package ID.

SAP Crystal Reports 2020

SAP Crystal Reports has been updated to version 2020. Crystal runtime components (SP30) are the same version as in Sage 300, Sage Fixed Assets, and Sage HRMS.

Accounts Payable

The following changes were made in the Accounts Payable module.

Masked 1099 Vendor Taxpayer ID/Social Security Number

The 1099 Vendor Taxpayer ID/Social Security Number is now masked in data entry tasks and will also print masked on the Vendor Listing, Vendor Listing with Balances, and Vendor Mailing Labels. Only users with the appropriate security setup can view this sensitive information and access the option Print Unmasked Taxpayer ID/SSN check box.

The check box is available based on the new security option in Role Maintenance, **Allow Viewing, Printing, and Editing of Highly Sensitive 1099 Information**.

💡 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the [Sage 100 ideas site](#).

Masked ACH Bank Account and Routing Numbers

The vendor electronic payment bank account and routing numbers are now masked in data entry tasks and will also print masked on the Vendor Listing. The routing transit numbers are also masked in ACH Maintenance. Only users with the appropriate security setup can view this sensitive information and access the option Print Unmasked ACH Information check box in Vendor Listing.

The check box is available based on the new security option in Role Maintenance, **Allow Viewing, Printing, and Editing of Highly Sensitive ACH Information**.

💡 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.

Improvements in Invoice Payment Selection

The Include check box has been added in the Select Invoices for Payment window, enabling you to quickly select each invoice for payment.

💡 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.

Vendor Maintenance

On the Additional tab in Vendor Maintenance, the DBA Name field has been renamed the 1099 Name field.

Development Studio

The following change was made in Development Studio.

Grid Definition Maintenance

When defining grid columns in Grid Definition Maintenance, you can now exclude columns from being exported to Excel by entering EXCEL=No at the Tag field.

Inventory Management

The following changes were made in the Inventory Management module.

Option to Hide Inactive Warehouses

The Display Quantities for Inactive Warehouses check box has been added on the Additional tab in Inventory Management Options to allow you to hide inactive warehouses.

A Show/Hide Inactive Warehouses button has been added in the following locations:

- Main tab on Item Maintenance and Item Inquiry
- Quantity tab on Item Maintenance and Item Inquiry
- Reorder Maintenance
- Item Quantity Inquiry

🔦 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the Sage 100 ideas site.

Option to Show/Hide Zero Quantities for Lot/Serial Items

The Display Zero Quantities for Lot/Serial Items in Cost Detail check box has been added on the Additional tab in Inventory Management Options. You can select this check box to initially display lot/serial items with zero quantities on the Cost Detail tab in Item Maintenance and Item Inquiry.

A Show/Hide Zero Quantity Lot/Serial Rows button has also been added on the Cost Detail tab in Item Maintenance and Item Inquiry.

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

Remove Inactive Items Utility

The Remove Inactive Items task has been added to the Inventory Management Utilities menu. After running the utility, the Activity log is updated with a list of inactive items removed.

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

Inventory Requirements Planning

The following changes were made in the Inventory Requirements Planning module.

Inventory Requirements Planning Options

The following options have been added:

- Pull In Work Ticket check box
- Push Out Work Ticket check box
- Round Integer Unit of Measure check box
- Base Effective Date on Release Date of Demand check box
- Calculate Build Time for Make Items Using field

Inventory Requirements Planning

The following fields have been added, providing more options for the IRP generation process:

- Effective Date field
- Include Sales Quotes check box
- Explode Make Action field
- Create Work Ticket with Materials From field
- Default Lead Time (Days) field
- Default Build Time (Days) field
- Advanced Arrival Allowance (Days) field

If the Inventory Requirements Planning module is not integrated with Production Management or Purchase Order, you can now click Production or Purchase to view a report of inventory demand.

Expanded Summary and Detail Information

In Items to Produce and Items to Purchase, you now have the option to view summary information for items with pending actions.

Item Detail now displays the recommended action, action date, and required date to meet demand for each detail record.

Schedule IRP Generation with Task Scheduler

You can now schedule the IRP generation process with Library Master Task Scheduler. This provides you with the flexibility to run the generation after business hours or overnight.

Inventory Requirements Planning Inquiry

Inventory Requirements Planning Inquiry has been added to the Inquiries menu. Use this task to view purchase or production information for an item based on the last completed IRP generation process.

💡 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.

Reports Menu

A Reports menu has been added, along with the following reports: Action By Vendor Report, Inventory Requirements Planning Report, Projected Demands Report, and Work Ticket and Sales Order Demand.

Action By Vendor Report

The Action By Vendor Report includes the ability to select by warehouse code and then print the warehouse code on the report. The standard unit of measure also prints on the report.

Projected Demands Report

The following changes have been made:

- A fiscal/calendar year option has been added, enabling you to print the report for a selected year.

- When the Consolidate Customers check box is selected if item projected demands are included in the consolidation, the Qty Sold column on the report displays the item's total quantity sold. If item projected demands are not included in the consolidation, the Qty Sold column displays the sum of the consolidated customer's quantity sold.

Library Master

The following changes were made in the Library Master module.

Option to Suppress Expired Messages

The Suppress Expired Messages check box has been added in User Maintenance, enabling you to suppress displaying expired license messages by user.

Retain Last Path in Data File Display and Maintenance

When you click the Folder button in Data File Display and Maintenance, the Select File window now shows the folder location of the last file viewed.

🔆 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.

Paperless Office

The following change was made in the Paperless Office module.

Updated Printer Driver

The Amyuni PDF Converter, the virtual printer driver used to create PDF documents, has been updated to version 6.5.1.7.

Production Management

The following changes were made in the Production Management module.

Enhanced Scheduling

Enhanced scheduling features have been added throughout the Production Management module to provide you with more flexibility and functionality.

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

Production Management Options Schedule tab

In Production Management Options, a Schedule tab has been added with the following new options:

- Select the Enable Enhanced Scheduling check box to use the forward or backward scheduling method to schedule work tickets. Enhanced scheduling is the functionality that was in the Work Order module.

  If you prefer to use basic scheduling, clear the Enable Enhanced Scheduling check box. Basic scheduling is the functionality that was in previous releases of Production Management.

- The Maximum Number of Months to Schedule field has been added.

- You can define default work center closures that will be used for all work centers.

Activity Code Maintenance

The following enhanced scheduling fields have been added in Activity Code Maintenance:

- Calculation Method
- Ignore Queue Time

Work Ticket Template Maintenance

The following enhanced scheduling fields have been added in Work Ticket Template Maintenance:

- Calculation Method
- Hours Per Activity / Activities per Hour / Number of Hours
- Overlap Percent
- Ignore Queue Time

Work Center Maintenance

The following changes have been made in Work Center Maintenance:

- Enhanced scheduling fields have been added: Queue Time (Hours), Efficiency Percent, Number of Workers or Machines, and Minimum Scheduling Time Period (Minutes)

- You can set up the number of hours a work center is available for operation each day of the week at the Available Hours fields.

- Closures for specific work centers can be set up.

- Click Copy From to copy information from an existing work center when creating a new one.

- Click Apply to copy available hours and closures from an existing work center to one or more other work centers.

- The Memo button is available to view, create, and maintain memos.

Work Ticket Entry

In Work Ticket Entry, the following changes have been made for enhanced scheduling:

- On the Schedule tab, the Schedule button has been added to access the new Schedule Work Ticket window.

- In the Schedule Work Ticket window, you can select the forward or backward scheduling method to determine when each step of a work ticket is started and how long each step takes to complete.

    - Use forward scheduling to enter the start date of a work ticket, and the scheduling process will calculate the due date for the work ticket.

    - Use backward scheduling to enter the due date for a work ticket, and the scheduling process will calculate when the work ticket will be released to the work center, in order for the work ticket to be completed on time.

- On the Schedule tab, the Manually Schedule check box has been added to give you the option to manually enter the production start date and production due date on the Schedule tab and the Steps tab.

- On the Steps tab, the following fields have been added to the secondary grid: Ignore Q Time, Overlap Percent, Prod Queue Date, Sched Method, Scheduling Hrs, Scaling Method, Scaling Factor, and Extended Time.

Work Ticket History Inquiry

You can now view detailed step information on the Work Ticket History Inquiry Schedule tab by selecting a step in the list box and clicking the Additional Information button.

Work Center Capacity Inquiry

Work Center Capacity Inquiry has been added to the Inquiries menu. Use this task to review commitments against work centers in three formats: daily, weekly, and detail.

Scheduled Capacity Report

Scheduled Capacity Report has been added to the Reports menu. Use this report to print commitments against work centers in three formats: daily, weekly, and detail.

Material Issue Workflow Improvements in Work Ticket Transaction Entry

In Work Ticket Transaction Entry when creating a materials transaction, you can now import available material lines with remaining quantity to issue in bulk to the Lines tab. This enhancement speeds data entry.

You have the option to select all available material lines, or you can use the new Material Selection window to select specific material lines to issue. The Material Selection button has been added on the Work Ticket Transaction Entry Lines tab to open the Material Selection window.

Lot/Serial History

A Lot/Serial History button has been added in the following locations:

- Materials tab on Work Ticket History Inquiry
- Inquiry tab on Work Ticket History Inquiry for the Materials and Completions views
- Inquiry tab on Work Ticket Entry for the Materials and Completions views

Selections for Purging Work Ticket History

In Purge Work Ticket History, selections have been added to enable you to purge by work ticket number, release date, and close date.

Work Ticket Template Maintenance

You can now add a scrap percentage for each item on the Materials tab in Work Ticket Template Maintenance.

💡 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.

Labor Entry

In Labor Entry if you're capturing punch in/out time for an employee and the Payroll module is integrated with Production Management, you can now select a department

worked in at the Dept No. field that is different than the employee's assigned department in Payroll Employee Maintenance.

When you update the Payroll Check Register, the department worked in and its general ledger accounts will be used instead of the employee's assigned department.

Add Activity Codes and Work Centers On the Fly

You can add on-the-fly activity codes and work centers in Work Ticket Class Maintenance, Work Ticket Template Maintenance, and Work Ticket Entry with the appropriate security setup in Library Master Role Maintenance.

Option to Relieve WIP Based on Percent Complete

The Relieve WIP Based on Percent Complete check box has been added on the Work Ticket Entry Header tab and the Work Ticket Class Maintenance Main tab. Select this check box to use the prorated cost for WIP when entering a partial completion in Work Ticket Transaction Entry.

Explode Bill Subassemblies

In Work Ticket Entry, the Explode Subassemblies check box has been replaced by the Explode Bill Subassemblies field. When the Bill of Materials module is integrated with Production Management and enhanced scheduling is used, selecting Yes at the Explode Bill Subassemblies field now creates work ticket steps for each subassembly on a multilevel bill. This functionality was in the Work Order module and has now been added to Production Management.

Explode Template Subassemblies

In Work Ticket Entry, the Explode Template Subassemblies field has been added, providing the ability to explode subassemblies defined on a work ticket template when enhanced scheduling is used.

Recalculate Material Budgets

On the Materials tab in Work Ticket Entry, the Recalculate Material Budgets button has been added, enabling you to recalculate budgets for the step assigned to the selected material line. All the material detail lines assigned to the same step will be recalculated.

Click the arrow next to the button, and then select Recalculate Material Budgets All Steps to recalculate budgets for all material lines and steps in the grid.

Work Ticket Entry Copy Feature

In the Work Ticket Entry Copy From window, the Production Start Date field has been added to simplify the process of copying a manually scheduled work ticket.

During the copy process, the system will calculate the number of days between the start date entered here and the source work ticket start date. The difference between the dates will be used to automatically adjust all of the scheduling dates in the source work ticket steps as they are copied.

Create Work Ticket with Materials From Option

A new option has been added in Production Management Options, enabling you to create a work ticket using the materials from the bill, work ticket template, both the bill and template, or you can select to be prompted with a message in Work Ticket Entry asking which materials to use.

Data Conversion for Earlier Version of Production Management

The Production Management module code has changed from JT to PM. When you convert Production Management data from an earlier version of Sage 100, the converted company data files are changed to use the PM prefix.

> **Important!** If you're upgrading from the standalone version of Production Management that was previously available, you must be on version 2021.x of the standalone version before upgrading to the Production Management module that is part of Sage 100 2023.

Features No Longer Subscription Only

The following features were initially available only if you purchased Sage 100 through a subscription plan. They are now available to all users, regardless of whether Sage 100 was purchased as a subscription or perpetual license.

- **Journal and Register Viewer**: Access to the Paperless Office Journal and Register Viewer is available from various locations.

- **Task Scheduler**: You can email reports printed from a Task Scheduler job.

- **Data File Display and Maintenance Enhancements**: You can now select a subset of fields from the table to be displayed. When selected, you can define filters and apply them to one or more of the fields to limit the rows displayed in the Key Scan screen. The status text on the Key Scan screen will indicate when a filter is active.

- **Map Service**: An option has been added on the Preferences tab in User Maintenance allowing you to select which map service to use when clicking the Map button in Sage 100 tasks. Use Google Maps, Bing Maps, or MapQuest.

Index