



Sage 300 Construction and Real Estate (formerly Sage Timberline Office)

Version 14.1

Release Notes

This is a publication of Sage Software, Inc.

Copyright © 2015. Sage Software, Inc. All rights reserved.

Sage, the Sage logos, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities. All other trademarks are the property of their respective owners.

Your use of this document and the Sage product(s) described herein is governed by the terms and conditions of the Sage End User License Agreement (“EULA”) or other agreement that is provided with or included in the Sage product. Nothing in this document supplements, modifies or amends those terms and conditions. Except as expressly stated in those terms and conditions, the information in this document is provided by Sage “AS IS” and Sage disclaims all express, implied or statutory warranties of any kind, including but not limited to the warranties of merchantability, fitness for a particular purpose or of non-infringement. No implied license is granted to you under any Sage intellectual property or trade secret right. Sage reserves the right to revise, supplement or remove information in this document at any time without notice to you or others.

Sage End User License Agreement: <http://na.sage.com/sage-na/eula>

Version 14.1 plus updates 1 - 4

Last updated: April 1, 2015

Table of Contents

Release Overview	1
Support and Assistance	3
Installation	4
Database Changes	5
General Topics	6
Accounts Payable	9
Accounts Receivable	10
Address Book	12
Billing	12
Cash Management	13
Contracts	13
Desktop	13
Equipment Cost	13
Financial Statements	14
General Ledger	14
Information Assistant	14
Inquiry	14
Inventory	14
Job Cost	15
MyAssistant	15
ODBC	15
Payroll (Australia)	16
Payroll (Canada)	18
Payroll (United States)	19
Project Management	22

Property Management 22

Purchasing 23

Remote Time Entry 23

Report Designer and Reporting 23

Residential Management 24

Sage Installation Manager 24

Sage System Verifier 24

Security Administration 24

Server Migration 25

Service Management 25

Release Overview

About this document

This document contains information about the current release of Sage 300 Construction and Real Estate. Each Sage 300 Construction and Real Estate application is described in a separate section, which includes information about new features and enhancements for the release, resolved issues, and any known issues.

In addition to reading this document, read the supporting documentation before you install. See [“Supporting documentation” on page 3](#).

About this release

The 14.1 release of Sage 300 Construction and Real Estate includes enhancements and software fixes. For information about the changes made in a specific application, refer to the appropriate section in this document. Highlights of this release are listed in the following table.

Application	Features and enhancements
general	“Support for the latest operating systems” on page 6 “Incorporation of the latest version of Crystal Reports” on page 6
Accounts Receivable	“Integration with Sage Payment Solutions” on page 10
Payroll - Australia	“SuperStream fund integration” on page 16
Payroll - U.S.	“State certified reports” on page 19
Purchasing	“PO-JC direct write integration fix” on page 23

You can also view the [What's New in This Release video](#) to learn more about the new features and enhancements.

About updates

We recommend that you install the latest update; update 4 includes the changes made in updates 1, 2, and 3. Highlights of these updates are listed in the table on the following page.

Update	Application	Features, enhancements, and resolved issues
1	general	"Office 365 compatibility " on page 6 "Network printing" on page 7
1	Accounts Receivable	"Additional integration with Sage Payment Solutions with update 1" on page 11
1	Payroll - Canada	"Bank account for direct deposits" on page 18
1	Service Management	"Attachments (links to files and websites)" on page 25 "Additional tracking information" on page 25
2	Payroll - US	"ACA compliance" on page 20 "Check stub amounts" on page 20 "Moving checks to history" on page 20
3	general	"Submit Enhancement Requests link" on page 7 "Upgrade Crystal Reports Tool" on page 7 "Printed status" on page 7
3	Billing	"Setting for calculating WIP" on page 12
3	Payroll - US	"Daily time entry for certified jobs" on page 20 "Time entry using Sage Construction Anywhere" on page 21 " Certified reports" on page 21
3	Purchasing	"Send to JC without PJ" on page 23
4	Accounts Payable	"Australian Taxable Payment Summary report" on page 9
4	Accounts Receivable	"Australian integration with Sage Payment Solutions with update 4" on page 11
4	Billing	"Setting for calculating WIP" on page 12
4	Payroll - Australia	"Additional SuperStream improvements with update 4" on page 16
4	Payroll - US	"State reports in Aatrix" on page 21 "Payroll reports updated" on page 21
4	Purchasing	"Warning messages" on page 23

Support and Assistance

Supporting documentation

In addition to reading this document, read the following supporting documentation before you install:


- The [Important](#) document contains critical and late-breaking topics.
- The [Installation Checklist](#) contains a brief description of the steps involved in upgrading your software.
- The [User's Guide](#) contains information about system requirements, security, Crystal Reports, and ODBC as well as installation steps for Sage 300 Construction and Real Estate and Sage Estimating.

You can access a [complete library of supported product documents](#).

Online help

Each Sage 300 Construction and Real Estate application includes online help, which provides information about procedures as well as items in the windows.

To access the help in the software:

- In a window, click the [Help] button, click  (the help icon button), or press F1 to display the help topic for that window.
- In an application, select **Help > Help Topics**.
- In the Desktop, select **Help > Application Help**, and then choose the desired application.

To aid you in finding information, the online help for each application includes the following tabs:

- **Contents** tab with an outline of the help with links to the help topics.
- **Index** tab with keywords that link to help topics related to that keyword.
- **Search** tab, where you can type text and click [Search] to locate that text in the help topics.

Training

Sage University offers live and recorded online training sessions to help you get the most out of your software. To access Sage University, either:

- From an application, select **Help > Web Resources > Sage University**.
- From Desktop, select **Tasks > Sage 300 Construction and Real Estate > Web Resources > Sage University**.
- From your browser, visit <http://www.sagesoftwareuniversity.com/>.

Contact your business partner for local training.


Technical assistance

When you need assistance, refer to the [How do I get technical support for Sage 300 Construction and Real Estate?](#) article to determine which service works best for you.

Installation

Before you install this version, review the **System Requirements** chapter of the *User's Guide* and the **Install Sage 300 Construction and Real Estate** chapter, which provides step-by-step instructions.

Sage 300 Construction and Real Estate version 14.1 includes installation of Pervasive 11. Your server and workstations must have Internet access to install and use this software.

 **IMPORTANT:** We have added support for the Microsoft Windows 8.1 and Windows Server 2012 R2 operating systems. However, we no longer support the Microsoft Windows XP or Microsoft Server 2003 operating systems due to changes in Microsoft support for these old operating systems. For a complete list of supported operating systems, see chapter 1 of the *User's Guide*.

 **TIP:** If you are planning to run Sage 300 Construction and Real Estate on new hardware, use the Server Migration tool. See chapter 5 of the *User's Guide* for instructions.

Installation paths

If you are on a version 9.7 or earlier, you must first upgrade to version 9.8 before upgrading to version 14.1. For more information, see the **Supported upgrade paths** section in Chapter 1 of the *User's Guide*.

Installation notes

- **Crystal Reports designs** - If you use custom Crystal Reports designs, run the new Upgrade Crystal Reports Tool *after* installing Sage 300 Construction and Real Estate 14.1 and upgrading your data files. See [page 6](#) for more information.
- **Document Management** - During the Accounting installation, AP invoice batches that are in the Document Management Scan queue will be locked. These batches are then automatically moved from the Scan queue to DocuVault during the installation of DocuVault 14.1. If you want to send these batches to an Inbox prior to the upgrade, you must complete that action *before* installing Sage 300 Construction and Real Estate.
- **Project Management Correspondence Log** - If you use the Correspondence Log and Windows Office 2010 or 2013, you must install Project Management components on your server and workstations *after* you install Sage 300 Construction and Real Estate 14.1. Follow the instructions in the "Install Project Management Components" section in Chapter 2 of the *User's Guide*.
- **Estimating** - If you use Sage Estimating, you must install Sage Estimating 14.1 *after* installing Sage 300 Construction and Real Estate 14.1.

- **Residential Management** - If you use Residential Management, you must install Residential Management 14.1 *after* installing Sage 300 Construction and Real Estate 14.1 and Sage Estimating 14.1 (if applicable).



IMPORTANT: If you use third-party products that integrate with Sage 300 Construction and Real Estate, check with your software vendor prior to upgrading to ensure their product is fully compatible with this release. We **do not** support rolling Sage 300 Construction and Real Estate back to a previous version and **do not** recommend it.



CAUTION: Residential Management is not currently supported on computers with the Windows 8, Windows 8.1, Windows Server 2012, or Windows Server 2012 R2 operating system.

Database Changes

As with any release, database changes in Sage 300 Construction and Real Estate applications may affect your custom report designs or custom third-party applications. Contact your authorized business partner to discuss any issues relating to custom reports or third-party applications.

To view fields contained in new records:

- In Report Designer, view the Available Fields report (by selecting **Tools > Available Fields**).
- In Crystal Reports Designer, open an existing report, specify the data source location, add new or modified records, and view the fields through Field Explorer. For more information about this procedure, refer to the **Crystal Reports** chapter of the *User's Guide*.

This document lists the current database changes by application:

Application	Page
Accounts Payable	page 9
Accounts Receivable	page 11
Payroll - Australia	page 16
Payroll - Canada	page 18
Payroll - United States	page 21



NOTE: With 14.1 Update 1, additional fields were added to the AR and SM records for the new features. With 14.1 Update 2, additional fields were added to the US Payroll records.

For information about database changes made in previous versions, see the previous Release Notes, which can be accessed from the [Product Documents page](#).

General Topics

New features and enhancements

Support for the latest operating systems


Sage 300 Construction and Real Estate is now supported on Windows 8.1 and Windows Server 2012 R2 operating systems (as well as Windows 8 and Windows Server 2012 operating systems).



NOTE: Sage 300 Construction and Real Estate is no longer supported on Windows XP or Windows Server 2003 operating systems, due to changes in Microsoft support for these old operating systems

Incorporation of the latest version of Crystal Reports

Sage 300 Construction and Real Estate now incorporates the latest version of the Crystal Reports runtime components (version 13). All CR report designs that come with Accounting, Estimating, and Residential Management were replaced with upgraded versions. Reports that took over 90 seconds to run will likely run faster using this new version.

If you have custom Crystal Reports designs, you must upgrade them before they can be used in Sage 300 Construction and Real Estate. You can use the new Upgrade Crystal Reports Tool, which is on the programs menu; click [Start], select **All Programs > Sage > Sage 300 Construction and Real Estate > Reporting and Other Tools**, right-click **Upgrade Crystal Reports**, and then select **Run as administrator**. For more information, click  (the help button) in the tool's window.



NOTE: The **Upgrade Crystal Reports** window displays messages about the report designs to be checked and upgraded. Not all designs will need to be upgraded. If a design cannot be upgraded, the tool displays a message in this window with the file name in red text.

If you use the Crystal Reports Designer, you will need to install the latest version, Crystal Reports For Sage 2013 SP2. This software only runs on Windows 7 SP1, Windows Server 2008, or higher operating systems (not Windows Vista). If you create new custom CR designs, use the Upgrade Crystal Reports Tool before using them in Sage 300 Construction and Real Estate. If you have problems previewing reports in Crystal Reports Designer, [log into the Sage Knowledgebase](#) and access Article 51402 for information.

New features and enhancements with update 1

Office 365 compatibility

Sage 300 Construction and Real Estate is now compatible with Microsoft Office 365 and "Click to Run" for most email functions. (The exception is the PJ core log.)

New features and enhancements with update 3

Submit Enhancement Requests link

When you want to submit an enhancement request, click **Help > Web Resources > Submit Enhancement Requests** in an application. This takes you to the following site:

<https://www5.v1ideas.com/TheSageGroupplc/Sage300ConstructionandRealEstate>

Resolved issues

Country code

If you installed a Microsoft update that changed the country code and use the Canadian version of Accounts Payable or Payroll, you no longer see a message about the country code not matching when you launch Accounts Payable or Payroll.

Redirected user profiles

Previously, when user profiles were redirected using a UNC path (instead of a mapped drive), users could not save field reports in Project Management or access Desktop due to a Microsoft .NET issue. Now, users can save field reports and access Desktop.

Resolved issues with update 1

Network printing

Previously, reports using a Crystal Reports design would not print on network printers whose names had mixed or lower case. Now, the reports print correctly to these network printers as well as those whose names are upper case,

Emailing a report

If you preview a report and then click the envelope icon to send the report to email, you no longer see an error message.

Resolved issues with update 3

Upgrade Crystal Reports Tool

The Upgrade Crystal Reports Tool now correctly upgrades custom reports that use the TSCustomDesc() function.

Printed status

When you use print preview for a work order, invoice, or purchase order and then print it, the status of the work order, invoice, or purchase order is now updated correctly to indicate it was printed.

Important notes

Remote print

If you plan to use the remote print feature, you need to change the logon account for the Sage Remote Print service on the server to one that has network permissions to print to the printers; the default Local System account may not work.

Accounts Payable

New features and enhancements

Additional security

You can now block an operator's view of the vendor's bank and tax information on the following tabs of the **Vendor Setup** window:

- **Electronic Payment Settings** tab
- **1099 Settings** tab (used in the United States)
- **T5018 Settings** tab (used in Canada)
- **Tax Settings** tab (used in Australia)

Resolved issues

Insurance dates

When you enter or change a date in the **Insurance Setup for Vendor** window, that date is correctly saved to the database.

Electronic payments

In the **Regenerate Electronic Payments** window, you can now click **[List]** to select the run number of the electronic payments that you want to regenerate.

Record Level Security

Previously, you would see an error when using Record Level Security and trying to print joint checks in certain scenarios. Now, you can print the joint checks successfully.

Resolved issues in update 4

Australian Taxable Payment Summary report

When the city for a vendor contains more than 27 characters, the task now generates the report successfully.

Database changes

APM #9 - Vendor

Added "Payment Reference" field (VPMTREF) for Australian electronic fund transfers, which is only shown and available for country code 61 (Australia).

APM #10 - Prefix Total

Added the "vendor, GL prefix, GL prefix level" alternate sort to this record.

Accounts Receivable

New features and enhancements

Integration with Sage Payment Solutions

Accounts Receivable (AR) is now integrated with Sage Payment Solutions (SPS), which enables you to electronically process the following types of payments from your customers:

- Checks, by entering check details or scanning the check (United States only)
- ACH (Automated Clearing House) transfers from their bank accounts, by entering bank account numbers (United States only)
- Credit and debit cards, by entering card details or swiping the card



NOTE: Integration with Sage Payment Solutions is not available in Australia.


Before you can begin processing electronic payments, your company must sign up with [Sage Payment Solutions](#), receive a merchant ID and merchant key, and set up AR to use SPS; see the "Managing electronic payments" topic in the AR help for more information.

When you receive payment information from a customer and want to use SPS, select **Tasks > Manage Electronic Payments** to open the **Manage Electronic Payments** window.

- If there isn't a deposit item already for this payment, enter information on the **New Payments** tab, click [**Create Payment**], select the type of payment, and then enter the payment details into SPS.
- If there is a deposit item for this payment, click the **AR Deposit Items** tab, select the deposit item to associate with the new payment, click [**Create Payment**], select the type of payment, and then enter the payment details into SPS.

You can also use the **Manage Electronic Payments** window to link payments to deposit items, view payment information, void or delete payments, and enter manual payments.

In Desktop, you can secure the ability to change the settings, void payments, delete payments, and link/unlink AR deposit items to payments as well as secure the **Manage Electronic Payments** task.

When you first use SPS, the Sage Exchange Desktop is installed. The  (Sage Exchange icon) appears on the taskbar of your screen. If you have a credit card swipe device or check scanning device attached to your computer, right-click the icon and select **Settings** to open the **Sage Exchange - Settings** window to install the drivers for that device.

Additional integration with Sage Payment Solutions with update 1

Update 1 makes it possible to create the deposit item while entering the payment from the Manage Electronic Payments task.

- 1 Select **Tasks > Manage Electronic Payments** to open the **Manage Electronic Payments** window.
- 2 Enter information on the **Customer Payments** tab.
- 3 On the **Payment details** sub-tab, change the bank account (if necessary) and enter other information about the payment.
- 4 If the payment is used to pay invoices, click the **Invoices to pay** sub-tab, select the invoices and distributions to pay.
- 5 Continue to process the payment, either through Sage Payment Solutions or manually.



TIP: For more details, see the "Managing electronic payments" topic in Accounts Receivable help.

You no longer need to create deposit items using the Enter Cash Receipts task and then link them to the electronic payments.

Australian integration with Sage Payment Solutions with update 4

The Manage Electronic Payments task is now available in Australian Accounts Receivable so you can use Sage Payment Solutions for credit and debit card payments.

Database changes

ARA #5 - Deposit Item

Changed the key description from **bank, deposit date, deposit id, invoice date** to **bank, deposit date, deposit id, deposit item**.

Added "Electronic Payment ID" field for integration with Sage Payment Solutions. Because of this addition, the field numbers after "NSF Bank Charge Amount" field changed.

Added the "Elec Payment" alternate sort to this record that omits nulls.

ARA #6 - Electronic Payment

Added this new record and alternate sort for integration with Sage Payment Solutions. This record contains the following fields:

- EPID = "Electronic Payment ID"
- EPVOID = "Voided"
- EPCUST = "%300"
("Customer"custom description)
- EPTIME = "Payment Time"
- EPMRKEY = "Merchant Key"
- EPAVS = "AVS Result"
- EPLNKD = "Linked"
- EPBANK = "%7"
("Bank Account"custom description)
- EPDATE = "Payment Date"
- EPMRID = "Merchant ID"
- EPAUTH = "Auth Code"
- EPCVV = "CVV Result"

- EPVAN = "VAN Reference"
- EPACCLF = "Account Last Four"
- EPPAMT = "Amount"
- EPPTYPA = "Payment Type"
- EPSHAMT = "Shipping Amount"
- EPREF2 = "Reference 2"
- EPMI = "Middle Initial"
- EPNAME = "Name"
- EPADDR2 = "Address 2"
- EPSTATE = "State"
- EPCNTRY = "Country"
- EPPHONE = "Telephone"
- EPOSTMP = "Operator Stamp"
- EPTSTMP = "Time Stamp"
- EPTRNID = "Transaction ID"
- EPPDESC = "Payment Description"
- EPPTYPE = "Payment Type ID"
- EPTXAMT = "Tax Amount"
- EPREF1 = "Reference 1"
- EPFNAME = "First Name"
- EPLNAME = "Last Name"
- EPADDR1 = "Address 1"
- EPCITY = "City"
- EPZIP = "Zip"
- EPEMAIL = "Email Address"
- EPFAX = "Fax"
- EPDSTMP = "Date Stamp"



NOTE: With 14.1 Update 1, additional fields were added to AR records for the new SPS features.

Address Book

There were no major updates to Address Book for this release.

Billing

New features and enhancements with updates 3 and 4

Although there were no major updates to Billing for the initial 14.1 release, updates 3 and 4 included enhancements.

Setting for calculating WIP

For update 3, the **Always use cost amount as basis for Mark Up** check box was added to the **General** tab in the **Billing Settings** window.

- Select this check box to use the cost amount (if available) when calculating the mark up to arrive at the WIP amount.
- Clear this check box to have the system always calculate the cost amount (by multiplying the units by the unit cost), and then calculate the mark up and the WIP amount.

For update 4, the check box applies to rate tables and standard items (as well as mark up), so it was renamed **Always use cost amount when calculating WIP**.

- Select this check box to have the system use the cost amount first (if available) before using the unit cost when calculating the WIP amount and the WIP unit price.
 - Clear this check box to have the system use the unit cost first (if available) before using the cost amount when calculating the WIP amount and the WIP unit price.
-

Cash Management

There were no major updates to Cash Management for this release.

Contracts

There were no major updates to Contracts for this release.

Desktop

New features and enhancements

You can now display the **MySageOnline** web page (<http://www.mysageonline.com>) in desktop by selecting a check box in the **Options** window.

The **Web Resources** selections (in the **Tasks** list on the left side of Desktop) now includes the **Sage City Forums** link and an updated **Submit Enhancement Requests** link.

Equipment Cost

There were no major updates to Equipment Cost for this release.

Financial Statements

There were no major updates to Financial Statements for this release.

General Ledger

There were no major updates to General Ledger for this release.

Resolved issues

Reports

Previously, you might see an error message when closing the application after viewing a Crystal Report within General Ledger. Now, the error message does not display when you close the application.

Information Assistant

There were no major updates to Information Assistant for this release.

Inquiry

There were no major updates to Inquiry for this release.

Inventory

There were no major updates to Inventory for this release.

Resolved issues

PJ jobs

If you add a job in Inventory (while entering or changing a purchase order, entering receipts, entering invoices, entering return authorities, or entering requisitions), the job will now be added correctly to both the Job Cost and Project Management modules.

Job Cost

There were no major updates to Job Cost for this release.

Resolved issues

Billing integration

WIP entries are now properly sent from Job Cost to Billing even if there are other entries in the file that do not successfully post.

Import direct costs

If the **Warning response** is set to **Reject Record** in the **Import Settings** window, when you import direct costs and there is a problem, the records are correctly rejected; the incorrect warning message is no longer displayed.

MyAssistant

There were no major updates to MyAssistant for this release.

ODBC

The ODBC driver was updated to collect data from the updated Sage 300 Construction and Real Estate databases. For more information about using the ODBC driver, see the **Sage 300 Construction and Real Estate ODBC** chapter of the *User's Guide*.

Payroll (Australia)

New features and enhancements

SuperStream fund integration

Payroll now includes the ability to set up funds for superannuation by using the **SuperStream Fund Setup** window. You use new selections in the **Fringe Setup** window (to set up employer contributions to SuperStream funds) and the **Deduction Setup** window (to set up employee contributions to SuperStream funds), and then specify the new fringe and/or deduction for the employees (in the **Employee Setup** window). When needed, you generate the SuperStream report and save it in the correct format to send to the government.

Additional SuperStream improvements with update 4

You can now select **Tasks > Create SuperAnnuation File** on the menu to create the electronic SuperAnnuation file to send to the Australian Taxation Office.

The **Fund ID** and **Fund Member ID** on the employee fringe record are now ODBC replaceable.

Database changes

PRM #1 - Employee

Added "Mobile Phone" field (EMOBL) for Australian superannuation, but is available for all country codes.

Added "Termination Reason" field (ETRMRSN) for Australian superannuation, which is only shown and available for country code 61 (Australia).

PRM #5 - Employee Deduct

Added the following fields for Australian superannuation, which are only shown and available for country code 61 (Australia).

- EDFNDID = "Fund ID"
- EDOTHER = "Other Contributor Type"
- EDOTHNM = "Other Contributor Name"
- EDMEMBR = "Fund Member ID"

PRM #6 - Employee Fringe

Added the following fields for Australian superannuation, which are only shown and available for country code 61 (Australia).

- EFFNDID = "Fund ID"
- EFMEMBR = "Fund Member ID"

PRM #1 (Employee) through #12 (Employee Custom Fields)

Because of the additions to the PRM #1 (Employee), PRM #5 (Employee Deduct), and PRM #6 (Employee Fringe) records, the field numbers for many fields in the PRM file changed.

PRS #3 - Deduction

Added the following fields for Australian superannuation, which are only shown and available for country code 61 (Australia).

- MDSSTYP = "SuperStream type"
- MDFNDID = "Fund ID"

PRS #4 - Fringe

Added the following fields for Australian superannuation, which are only shown and available for country code 61 (Australia).

- FSSTYP = "SuperStream type"
- FFNDID = "Fund ID"

Added the "Travel/Subsistence" choice ("S") to the existing "Benefit Type" field (FTYPE) for Australia superannuation.

PRS #16 - Check Form

Although not used by Australian Payroll, added new field for United States Payroll.

PRS #3 (Deduction) through #25 (Aatrix Group Item)

Because of the additions to the PRS #3 (Deduction), PRS #4 (Fringe), and PRS #16 (Check Form) records, the field numbers for fields after the MDSSTYP field (in PRS#3) changed.

PRS #25 - Fund

Added this new record for Australian SuperStream funds. This record contains the following fields:

- FNID = "Fund ID"
- FNNAME = "Fund Name"
- FNEMPLR = "Fund Employer ID"
- FNOSTMP = "Operator Stamp"
- FNDSTMP = "Date Stamp"
- FNTSTMP = "Time Stamp"

PRX #4 - Tax

Removed the "allow_replace" flags in the following existing fields:

- XLTYPE = "Local Type"
 - TXOHSD = "Ohio School District?"
 - TXSDNBR = "School District Number"
 - TXSTCDE = "State Code"
 - TXCMPAR = "Compare rates?"
 - TXLCCDE = "Local tax code"
 - TXDESC1 = "Local description 1"
 - TXDESC2 = "Local Description 2"
 - TXRES = "Resident rate"
 - TXNRES = "Non-resident rate"
-

Payroll (Canada)

There were no major updates to Canadian Payroll for this release.

Resolved issues

Reporting

Cheques with the same cheque date but different period-end dates are now reported correctly in quarterly reports as well as on T4 forms.

Resolved issues in update 1

Bank account for direct deposits

The bank account is now always saved when a new direct deposit deduction is set up for an employee.

Database changes

PRM #1 - Employee

Although not currently used by Canadian Payroll, added two new fields for Australian Payroll.

PRM #5 - Employee Deduct

Although not used by Canadian Payroll, added four new fields for Australian Payroll.

PRM #6 - Employee Fringe

Although not used by Canadian Payroll, added two new fields for Australian Payroll.

PRM #1 (Employee) through #12 (Employee Custom Fields)

Because of the additions to the PRM #1 (Employee), PRM #5 (Employee Deduct), and PRM #6 (Employee Fringe) records, the field numbers for many fields in the PRM file changed.

PRS #3 - Deduction

Although not used by Canadian Payroll, added two new fields for Australian Payroll.

PRS #4 - Fringe

Although not used by Canadian Payroll, added two new fields for Australian Payroll.

PRS #16 - Check Form

Although not used by Canadian Payroll, added new field for United States Payroll.

PRS #3 (Deduction) through #25 (Aatrix Group Item)

Because of the additions to the PRS #3 (Deduction), PRS #4 (Fringe), and PRS #16 (Check Form) records, the field numbers for fields after the MDSSTYP field (in PRS#3) changed.

PRS #25 - Fund

Added this new record for Australian Payroll.

PRX #4 - Tax

Removed the "allow_replace" flags in the following existing fields:

- XLTYPE = "Local Type"
- TXSDNBR = "School District Number"
- TXCMPAR = "Compare rates?"
- TXDESC1 = "Local description 1"
- TXRES = "Resident rate"
- TXOHSD = "Ohio School District?"
- TXSTCDE = "State Code"
- TXLCCDE = "Local tax code"
- TXDESC2 = "Local Description 2"
- TXNRES = "Non-resident rate"

Payroll (United States)

New features and enhancements

State certified reports

Additional state certified reports are now available. You can now generate and file certified reports for federally-funded jobs in the following states:

- Alabama
- Alaska
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- Illinois
- Georgia
- Hawaii
- Kentucky
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Missouri
- Nevada
- New Jersey
- New Mexico
- New York
- North Carolina
- North Dakota
- Ohio
- Oregon
- Pennsylvania
- Rhode Island
- Washington
- Wisconsin

To generate the certified report:

- 1 Select **Tasks > State eFile and Reporting**.
- 2 In the **State eFile and Reporting** window, select the state, report, and period end date, and then click **[Next]**.
- 3 Select the projects to process, and then click **[Next]**.
- 4 Select the employees to process, and then click **[Next]**.

- 5 Select the project from the project list, and then click **[View]**.

The report is then displayed in the Aatrix window.

New features in update 2

ACA compliance

In 2015, there are new reporting requirements concerning health care coverage to ensure compliance with the Affordable Care Act (ACA). Your company may need to file two additional tax forms: Form 1094-C and Form 1095-C. Update 2 includes new fields to track the required information, such as the health care coverage codes and individuals covered by a self-insured health plan. There is also a new task to calculate the number of full-time and full-time equivalent employees by month to help determine if you need to file the new forms.

Resolved issues

Reporting

Checks with the same check date but different period-end dates are now reported correctly in quarterly reports as well as on W-2 forms.

Certified reports

In order to generate certified reports for employees with bi-weekly pay frequencies, there is now a new **Select Pay Frequency for Report** window.

Resolved issues in update 2

Check stub amounts

The YTD totals on the check stubs now include the amounts from the current check.

Moving checks to history

When you perform the task to move current checks to history, a message now displays that warns you that any checks moved will not be included in the totals on the W-2 forms; you can choose to continue moving the checks to history or cancel the move.

Resolved issues in update 3

Daily time entry for certified jobs

When you enter employee time for a certified job in the daily distribution grid, you no longer get an error when you accept the line.

Time entry using Sage Construction Anywhere

When you enter employee time for a certified job using Sage Construction Anywhere, the daily distribution records are now correctly created for regular and overtime entries, so they are now included on the certified reports.

Certified reports

The Certified and Bi-Weekly Certified reports now only show regular and overtime entries, not entries for vacation or other pay types.

Resolved issues in update 4

State reports in Aatrix

When you eFile state reports and the **Company Rates** check box is selected for a state tax in the **Tax Rate Setup** window for that state, the correct tax rate is now always passed to Aatrix.

Payroll reports updated

Payroll Check Recap by Employee report now includes the MEDADDL tax in the FICA field. The PR Time Sheet.rpt takes less time to process.

Database changes

PRM #1 - Employee

Although not currently used by United States Payroll, added two new fields for Australian Payroll.

PRM #5 - Employee Deduct

Although not used by United States Payroll, added four new fields for Australian Payroll.

PRM #6 - Employee Fringe

Although not used by United States Payroll, added two new fields for Australian Payroll.

PRM #1 (Employee) through #12 (Employee Custom Fields)

Because of the additions to the PRM #1 (Employee), PRM #5 (Employee Deduct), and PRM #6 (Employee Fringe) records, the field numbers for many fields in the PRM file changed.

PRS #3 - Deduction

Although not used by United States Payroll, added two new fields for Australian Payroll.

PRS #4 - Fringe

Although not used by United States Payroll, added two new fields for Australian Payroll.

PRS #16 - Check Form

Added "Print total hours" field (CFTLHRS) for pay stubs in Hawaii.

PRS #3 (Deduction) through #25 (Aatrix Group Item)

Because of the additions to the PRS #3 (Deduction), PRS #4 (Fringe), and PRS #16 (Check Form) records, the field numbers for fields after the MDSSTYP field (in PRS#3) changed.

PRS #25 - Fund

Added this new record for Australian Payroll.

PRX #4 - Tax

Removed the "allow_replace" flags in the following existing fields:

- XLTYPE = "Local Type"
- TXSDNBR = "School District Number"
- TXCMPAR = "Compare rates?"
- TXDESC1 = "Local description 1"
- TXRES = "Resident rate"
- TXOHSD = "Ohio School District?"
- TXSTCDE = "State Code"
- TXLCCDE = "Local tax code"
- TXDESC2 = "Local Description 2"
- TXNRES = "Non-resident rate"



NOTE: With 14.1 Update 2, additional fields were added to PR records for the new ACA compliance features.

Project Management

There were no major updates to Project Management for this release.

Resolved issues

Spelling checker

If you run the spelling checker on a text entry (such as for a meeting minutes item or a question/answer in an RFI), accept the changes, and click [**Save**], the text entry is now always saved.

Property Management

There were no major updates to Property Management for this release.

Purchasing

New features and enhancements

PO-JC direct write integration fix

When you select **Tasks > Post Orders to Job Cost**, the software uses an improved "direct write" method to post purchase order information to Job Cost.

Resolved issues

Job in JC and PJ

If you add a job in Purchasing (while entering stock items or requisitions), the job will now be added correctly to both the Job Cost (JC) and Project Management (PJ) modules.

Resolved issues in update 3

Send to JC without PJ

If you do not have Project Management (PJ) installed, you no longer get an error when you send purchase orders to Job Cost.

Resolved issues in update 4

Warning messages

When one operator gets a warning message, such as when entering requisitions, the warning message no longer impacts the work flow of other operators.

Remote Time Entry

There were no major updates to Remote Time Entry for this release.

Report Designer and Reporting

There were no major updates to Report Designer for this release.

Residential Management

There were no major updates to Residential Management for this release.



CAUTION: Residential Management is not currently supported on computers with the Windows 8, Windows 8.1, Windows Server 2012, or Windows Server 2012 R2 operating system.

Sage Installation Manager

New features and enhancements

The Sage Installation Manager program was improved to increase reliability. When a user attempts to use Sage 300 Construction and Real Estate on a workstation that does not have the same update as the server, the system displays a prompt to install the update on that workstation.

Important notes

If you set up email notifications, you may receive many emails after an update is installed successfully. For example, if an update is successfully installed on workstations that are shut down every night, you may receive email notifications about a successful installation every morning when the users restart their workstations. You can eliminate these email notifications by clicking **Change Settings** in the Sage Installation Manager console, selecting each subscriber in the table on the **Email Notifications** tab, clicking [**Modify**], and clearing the **Installation Successful** check box.

Sage System Verifier

There were no major updates to Sage System Verifier for this release.

Security Administration

New features and enhancements

You can now set security to mask sensitive vendor data, such as the tax ID number and name on the **1099 Settings** tab of the **Vendor Setup** window.

Server Migration

There were no major updates to Server Migration for this release.

Service Management

New features and enhancements with update 1

Although there were no major updates to Service Management for the initial 14.1 release, update 1 included enhancements.

Attachments (links to files and websites)

You can now attach links to files (such as photos and documents) and websites from a Service Management record.

Additional tracking information

You can now specify the estimated date and time of arrival on the **Schedule** tab of the **Assignment Properties** window. On the **General** tab of the **Work Order Properties** window, you can now include information about the timeframe or dollar amount that should not be exceeded.



NOTE: With 14.1 Update 1, additional fields were added to SM records for the new features.