Sage 100 Contractor 2022 (SQL)

Version 24.2 Release Notes

Canada and U.S. Editions

November 2022

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Installation Notes

Compatibility with Sage Estimating

> **Important!** Sage 100 Contractor version 24.2 is not compatible with Sage Estimating version 20.1 and earlier versions. If you integrate Sage 100 Contractor with Sage Estimating, do not install Sage 100 Contractor version 24.2 until you install Sage Estimating version 21.1, or later.

Update 1 – November 2022 (Build 24.2.113)

Fixes in Both Editions

Version 24.2 includes the following software fixes in both the U.S. and Canadian editions:

- Calculated fields that stopped working in certain report forms in the initial release of version 24.2 are working properly.

  These fields and report forms are: payrec^paynum in the 5-1-6 Certified report form; CChecknumMICRC in check forms; Cpayrec^checknumC in paycheck and Cacpinv^chknum in Accounts Payable check forms.

- In the Activity Center, you no longer receive an error if you click a tab that contains a shortcut to a Windows shortcut.

- In the Job Costs window for the **4-2 Payable Invoices** window, you no longer receive an error when selecting a cost code if the invoice you are working with references a purchase order that used no cost codes.

Fixes for the U.S. Edition

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

- If your employees accrue sick time or vacation, and you paid out vacation or sick time since you installed version 24.2, accrued balances appearing on the **Sick Days Earned and Used** report and the **Vacation Hours Earned and Used** report may be incorrect. The balance calculations for these reports subtracted the sick time (or vacation) taken from the time accrued for the pay period, instead of from the existing balance.

  To see whether this issue affects you, check the reports for employees who have taken sick time or vacation since you installed version 24.2. If the amount shown for **Accrued Vacation from Employee Record** (or the **Accrued Sick from Employee Record**) is different from the **Current Calculated Balance**, you can correct the individual payroll records that triggered the error. For information about how to correct these errors, see Knowledgebase article 117712.

  > **Note:** Accruals shown in employee records are correct. They were not affected by this issue.

- In the **5-1-11 Certified Payroll** window, on the **Options** menu, you can select a new **Reduce Reported Cash Fringe by Employee Offset** option.

  When you select this option, fringe benefits reported in Box 6 of Certified Payroll reports will be reduced by any offsets specified for fringe benefit calculations in employee records.

U.S. Payroll Tax Tables–September 2022

Payroll tax tables have changed for the following jurisdictions:

- Arkansas (effective October 1, 2022)
- Virginia (effective October 1, 2022)

Tax change for Indiana

Indiana now allows an additional exemption for adoptions of qualifying dependents, which is double the usual amount for non-adoptive exemptions.

To adjust the payroll calculation for employees affected by this exemption:

1. In the **5-2-1 Employees** record, select the **Calculations** tab.

2. To determine the number to enter in the **Add Allow** column:

    a. Note the number of qualifying dependents from line 6 of the Indiana Withholding Exemption Certificate.

    b. Double the number of adopted qualifying dependents claimed on line 7 of the Indiana Withholding Exemption Certificate.

    c. Add the results from steps 2(a) and 2(b), and then enter that sum in the Add Allow column.

    > **Example:** Say you currently have 3 qualifying dependents, and the Add Allow column displays 3. If 2 of those dependents are adopted, you now get an additional exemption for those dependents. The additional exemption for an adopted dependent is twice the amount for a qualifying dependent. Therefore, you add 4 to the existing number, giving you a total of 7 in the Add Allow column.

Enhancements in Version 24.2

This section describes the new features and enhancements you will find in version 24.2.

We've been listening to you!

Sage thanks you for your product ideas! In version 24.2, we have incorporated the following top-ranked suggestions from the Sage Ideas site. Later sections in the Release Notes describe changes that require more detailed explanation.

- **General Ledger**

  In the **1-8 General Ledger Setup** window, we've streamlined the pre-built General Contractor Accounts and Subcontractor Accounts. We removed approximately 30 accounts that were deemed to be little-used from these charts of accounts.

  The pre-built Home Builder and Remodeler charts of accounts are not affected by this change.

  Thank you for this suggestion, Charlene D.

- **Accounts Receivable**

  - In the **3-5 Jobs (Accounts Receivable)** window, the Budget option now includes approved changes to the budget. The grid displays changes in a separate column for each cost type, along with the original budget amounts.

    Thank you for this suggestion, Libbie E.

  - In the **3-10-4 Post T&M Invoices** window, you can remove computed but not posted time and material invoices. You select any invoices you don't want to post, and then remove them by clicking a new **[Remove]** button. You no longer have to post and then void manually time and material invoices that were generated in error. Removing invoices this way turns off the Billing In Process status in the job cost records for the selected job and clears the computed value in the associated Time and Materials record.

    Thank you for this suggestion, Gary P.

- **Accounts Payable**

  - If you specify a subcontract for a new invoice in the **4-2 Payable Invoices/Credits** window, when you click the Save button on the toolbar or select **Job Costs** on the Options menu, in the Job Costs window that appears, only cost codes used in the specified subcontract are available from

the Cost Code lookup window, by default. However, you can change the **View by** filter for the lookup window to display cost codes for the job, the job and phase, or all cost codes, as you prefer.

Similarly, when you specify a purchase order for the invoice, the Purchase Orders lookup window for the Job Costs grid initially displays only cost codes from the selected purchase order. As for subcontracts, you can change the **View by** filter to display cost codes for the job, the job and phase, or all cost codes.

> **Note:** This feature is available only for invoices you create using version 24.2 that have direct expenses. (Cost codes are not available for inventory expenses.)

Thank you for this suggestion, Lynn M.

- We added new [**Charges**] and [**Payments**] buttons to the **4-7-2 Credit Cards** window that you can use to display credit card charges and payments for a selected card issuer and credit card account.

  We also added a new [**Credit Card Payments**] button to the **4-4 Vendors** window that you can use to display payments made by credit card to a selected vendor.

  Thank you for this suggestion, Tina P.

- We simplified the names for several **4-7 Credit Card Management** menu items and updated the labels for the corresponding desktop shortcuts.

  The new menu names appear in the **7-7 User Activity Report** and in the tool tip for Advanced File Attachment for General Ledger in Database Administration.

- The **4-7-3 Credit Card Receipts** window no longer displays a default credit card issuer or a default credit card, unless there is only one credit card account.

  Thank you for this suggestion, Lary S.

For more information about the changes to 4-7 Credit Card Management, see Improved Credit Card Management, later in this document.

- Payroll

  - With version 24.2, you no longer need to archive payroll before you start a new year. You can now keep multiple years of payroll records with your current company. Archiving and closing a payroll year are now distinct processes. You still need to close a payroll year before you can begin processing in the new year, but closing a year doesn't remove records. To close a payroll year without archiving records, you use the **5-3-8 Close Payroll Year** window.

When you're ready to remove old years of payroll data from your current company, you use the **Archive Oldest Payroll Year** function in Database Administration. At that point, Sage 100 Contractor removes the archived data from the current payroll records and creates an archive company.

To accommodate this capability, we changed the following processing and reporting windows:

- 5-1-4 State Tax Report (U.S.)

- 5-1-8 Hours Report

- 5-2-2 Payroll Records

- 5-2-3 Compute Payroll

- 5-2-4 Payroll Checks

- 5-3-7 Payroll Audit

- 5-3-8 Close Payroll Year

- Aatrix Reporting

- Archive Oldest Payroll Year (formerly Archive Payroll) in Database Administration

Our thanks to many customers who asked for this enhancement!

To read more about these changes, see "Multiyear Payroll" (page 9), later in this document.

- 5-2 Payroll Processing

  - In the **5-2-2 Payroll Records** window, we added a new **Default Overtime Over 40 Hours Per Week** option to the Options menu.

    When you select this option, if the employee is a weekly or bi-weekly employee, the date on the timecard line falls within the pay period, and the employee is not exempt from overtime, Sage 100 Contractor calculates the hours already entered for the week. If the total for the week is over 40, the timecard lines default to Overtime.

    Thank you for this suggestion, Tammie Y.

  - In the **5-2-1 Employees** window, when you select cells in the grid on the Calculations tab, the sum of the selected cells is displayed in the lower right of the tab.

    Thank you for this suggestion, Charlene D.

- **Service Receivables**

  For the U.S. Edition, we added a new **11-1-10-41 Combined AR/SR Tax Report**, which includes:

- A summary that shows for each tax entity, the rate, the taxable amounts, and sales tax paid. If you choose to include invoice details, all invoices are listed for each entity.

- A breakdown for each district by Tax Entity with Rate, Non-Taxable, Taxable, and Sales Tax.

- A total for all the Tax Districts. If you choose to include invoice details, the report includes the Record#, Invoice# Date Client/Job, Non-tax, Taxable and Sales Tax detail for each invoice and a total line for the Tax District.

This report is also available in Receivable Reports as 3-1-11-41.

Thank you for this suggestion, Lisa S.

- **Review and Reporting**

We modified the criteria for the 2-6-0-21, 2-6-0-31 and 2-6-0-41 Check Register reports so you can select records to include in the report by Transaction#.

Thank you for this suggestion, Rick M.

Improved Credit Card Management

Version 24.2 provides the following enhancements to Credit Card Management.

Simplified names for the 4-7 Credit Card Management menu

You'll notice new names for several items on the 4-7 Credit Card Management menu.

4-7 Credit Card Management menu names

Earlier versions	Version 24.2
4-7-1 Add/Edit Issuer Accounts	4-7-1 Card Issuer Accounts
4-7-2 Add/Edit Credit Cards	4-7-2 Credit Cards
4-7-3 Enter Credit Card Receipts	4-7-3 Credit Card Receipts
4-7-4 Enter Recurring Charges	4-7-4 Recurring Credit Card Charges
4-7-5 Reconcile Credit Card Statements	4-7-5 Reconcile Credit Card Accounts

The labels for the corresponding desktop shortcuts will be updated with the new menu names when you first run version 24.2.

View credit card charges and payments from the 4-7-2 Credit Cards window

When you select a credit card account from the list in the **4-7-2 Credit Cards** window, you can use the new [**Charges**] and [**Payments**] buttons to open separate windows where you can view charges and payments,

respectively, for the selected credit card:

- The **Credit Card Charges** window lists charges processed in the 4-3-2 Payable Credit Cards, 4-7-3 Credit Card Receipts, and 4-7-4 Recurring Credit Card Charges windows. They are listed by date, starting with the most recent charges.

- The **Credit Card Payments** window lists payments processed in the 1-1 Checks and Bank Charges and 4-7-6 Credit Card Payments windows. They are also listed by date, starting with the most recent charges.

The **Options** menu also provides **Charges** and **Payments** options that you can use instead of the buttons, if you prefer.

View credit card payments from the 4-4 Vendors window

When you display a vendor in the **4-4 Vendors** window, you can use the new [**Credit Card Payments**] button to open a separate window where you can view credit card payments made to the selected vendor.

The **Credit Card Payments** window lists credit card payment transactions processed in the 4-3-2 Payable Credit Cards and 4-7-3 Credit Card Receipts windows. (Only transaction lines posted to designated credit card accounts are included.)

Multiyear Payroll

Many customers asked us for the ability to keep more than one year of payroll records in the current company. Until now, you had to archive payroll for the previous year before you could start recording payroll for a new year. With version 24.2, you can complete payroll processing for the year, and then close it, instead of archiving it.

Archiving and closing a payroll year are now distinct processes. You still need to close a payroll year before you can begin processing in the new year, but closing a year doesn't remove records. Keeping multiple years of payroll records with your current company enables you to run payroll reports and process any final adjustments for the previous year without having to switch to an archive company. Also, closing the payroll year is a much simpler, less time-consuming process than archiving, which can help alleviate pressure at year end.

To close a payroll year without archiving records, you use the **5-3-8 Close Payroll Year** window.

When you're ready to remove old years of payroll data from your current company, you use the **Archive Oldest Payroll Year** function in Database Administration. At that point, Sage 100 Contractor removes the archived data from the current payroll records and creates an archive company. (If you haven't yet closed the payroll year, Sage 100 Contractor closes it for you when you archive it.)

To accommodate this capability, we changed a number of processing and reporting windows, as described in the following sections.

Changes to 5-1-4 State Tax Report (U.S. Edition only)

The following reports now include a new **Prior Year** option:

- 61 – State Quarterly Wage Report

- 63 – State Quarterly Wage Report~Single State Employers"

- 66 – Quarterly Earnings

Selecting **Prior Year** generates the report for the immediately preceding year. (This option does not generate reports for any years before the immediately preceding year.)

If you don't select **Prior Year**, the report is generated for the current year.

In addition, you can now drill down to the **31 - State Tax Report~Long** report from these reports for a specified year.

Changes to 5-1-8 Hours Report

The following reports print a **Last Year Carry Forward** amount at the beginning of each employee's section. They now indicate the year the carry-forward amount is from:

- 81- Sick Days Earned and Used (U.S. Edition only)

- 86 - Vacation Hours Earned and Used (U.S. Edition only)

These reports also include a new **Include Prior Years** check box, which you use as follows:

- If you select Include Prior Years, the report includes all payroll records, and the Last Year Carry Forward text at the beginning of each employee's section says Carry Forward From XXXX, where XXXX represents the latest archived year, from which the carry forward amount was taken.

- If you don't select Include Prior Years, the report shows sick days or vacation hours only for the current year.

In both the Canadian and U.S Editions, the **5-1-8-91 - Absence Hours and Wages~by Employee** report used to provide **Quarter#** as selection criteria. However, Quarter# is no longer allowed for this report. You should now use **Check Date** to restrict the report to data for a single quarter from a single year.

Changes to 5-2-2 Payroll Records

Although payroll records from previous years can now co-exist in your database with current payroll, records older than the immediately preceding payroll year are "read only."

Voiding a payroll record with a check date in the preceding payroll year updates information for the employee for that year and it may update information in the current record. See Changes to 5-2-3 Compute Payroll for more information.

You should be careful when changing the year for a check date. Sage 100 Contractor will recalculate payroll reports and the employee's YTD/QTD totals for the affected years automatically.

> **Important!** You need both Company Administrator rights and Payroll Admin rights (if you use that feature) to change the check date to a different year for a computed or posted payroll record.

Changes to 5-2-3 Compute Payroll

A critical factor in the computation of payroll in a multiyear payroll system is the check date.

Calculating rates, maximums, and accruals

Compute Payroll always uses current payroll data to calculate rates and maximum amounts. However, the check date year can affect the computation of sick and vacation hours. For example, Compute Payroll uses the date to determine whether the employee exceeded the maximum or YTD limits for that year. Because sick or vacation for the current year can't exceed the current year's maximum, even if a paycheck from the previous year could accrue additional hours of sick or vacation time, those accrued hours might not brought forward to the current year.

Updating employee records

The check date also affects how employee records are updated after final computing. The check date year determines whether the employee's YTD and QTD amounts are updated to the previous year's records or the current record. It also determines how advances, sick, and vacation amounts are updated. Because Sage 100 Contractor makes these determinations and updates the records automatically, you should not need to use 5-3-7 to recalculate balances.

The final compute of a prior year check updates the following fields in the employee record:

- QTD wages (prior year)
- Sick Available (prior year and current year)
- Sick Accrued YTD (prior year)
- Sick Federal YTD (prior year)
- Vacation Available (prior year and current year)
- Vacation Accrued YTD (prior year)
- For Canada, only, Accrued Vacation Due (prior year and current year)
- Advances Due (prior year and current year)
- Carry-forward amounts for sick and vacation (current year)

Changes to 5-2-4 Payroll Checks

When you print payroll checks, Sage 100 Contractor warns you if there are any records where the check date year used in the printed check is different from the check date year in the payroll. For example, you might need to assign a check date for late December when you enter a payroll record, but you end up printing the check in the following January. You also receive a warning if the check date on the printed check is for a different payroll quarter than the quarter in the payroll record.

If you receive such a warning, you should run and review the payroll audit so that you can correct any errors, as necessary.

Changes to 5-3-7 Payroll Audit

Because you can now work with last year's payroll in the current data, you may need to audit and repair last year's payroll from time to time. The **5-3-7 Payroll Audit** window includes a new Audit/Repair payroll for the prior year (XXXX) option, where XXXX represents the prior year. This option is available if:

- Payroll has been closed at least once using version 24.2.

- There are payroll records with check dates that precede the current payroll year.

- Payroll was closed for the prior year.

- The year that is displayed immediately precedes the current payroll year.

The Audit and Repair functions determine whether the records are from the current payroll year or the immediately preceding year and examines only payroll records with check dates for the year being audited.

If you audit and repair the prior payroll year, the program uses calculations, employee rates, and maximums from that year, and compares the results against the associated employee YTD and QTD amounts.

If you audit and repair the current year, the program looks for any payroll records with a check date later than December 31 of the current year.

Changes to 5-3-8 Close Payroll Year

To use this window, you need to be logged as Company Administrator and have Payroll Admin rights (if you use Payroll Security).

> **Note:** You cannot close a future year or close the current year before December of the current payroll year, as determined by your computer's system date.

When you close payroll, Sage 100 Contractor:

1. Saves certain payroll data separately from the current records for the year that you're closing.

2. Clears each employee's **YTD** and **QTD** totals, including sick and vacation YTD amounts.

3. Updates each employee's **Last Year Carry Forward** amounts with the current available sick and vacation hours.

4. In the U.S. Edition, creates employee ACA records for the new year by copying the December values from the closing year.

5. Updates **The first pay period paid in the current year ended on** for the biweekly payroll period setting in the **5-6-6 Time Entry Settings** window.

6. Advances the current payroll year.

Changes to Aatrix Reporting

The only change to Aatrix Reporting is that if the report year is not the same as the current payroll year, the program reads payroll calculation data for the reporting year, rather than the current data. If there are no records for the reporting year's payroll calculations, it reads the current year's data.

Changes to Archive Oldest Payroll Year in Database Administration

We changed the name of the payroll archive option from **Archive Payroll Data** to **Archive Oldest Payroll Year**. The option now shows the year to be archived as soon as you select a company if the payroll year to archive can be determined–that is, if payroll has been closed or archived since multiyear payroll was released.

If you archive payroll without having closed the payroll year, the program closes payroll as usual, and then makes a backup of the company.

When you archive the oldest payroll year, Sage 100 Contractor:

1. Closes payroll if you haven't already closed it for the year you are archiving.

2. Creates a backup.

3. Restores the backup as the payroll archive.

4. In the archive database:

   a. Removes future payroll records.

   b. Retains only payroll data for the year you are archiving.

   c. Updates the company with the payroll archive name.

    d. Updates the current payroll year to the year you are archiving.

    e. Performs a silent Audit and Repair.

    f. Flags the database as an archive and updates the company background color to the default archive red.

    g. Creates a backup.

5. In the current company database, it:

    a. Removes the archive year's payroll data.

    b. Removes the archive year's records from **Simple Time Entry** where the work date is earlier than November 1 of the archive year.

    c. Removes employee records according to the archive options you selected.

    d. Runs Database Maintenance (providing no users are logged in).

    e. Creates a backup.

Other improvements

Version 24.2 also includes the following improvements:

Entering job costs for completed jobs triggers one warning per job

When you enter job costs for completed jobs in the **5-2-2 Payroll Records**, **5-5-1 Daily Payroll Entry**, **5-6-2 Enter Time**, **5-6-3 Review Time**, **5-6-4 Approve Time**, or **8-4 Equipment Allocation** windows, Sage 100 Contractor warns you only once for each completed job.

Do you have a product idea you want to share with us?

We want to hear it!

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

1. On the Sage 100 Contractor desktop, click the **Home & Resources** tab > **Submit Product Idea**.

2. Log in to the Sage 100 Contractor Ideas site (or sign up).

3. Describe your idea.

4. (optional) Browse through others' suggestions, and vote for the ones you love!

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

Fixes in Version 24.2

The initial release of version 24.1, build 24.2.100 (released October 6, 2022), was quickly replaced with build 24.2.103 (released October 11, 2022). The replacement build includes the following fixes:

- The Sage Time app launches properly.

- Tax amounts shown on state tax reports are correct.

- YTD totals for individual calculations in **5-2-2 Payroll Records** are computed correctly.

  If you final-computed or trial-computed payroll using build 24.2.100, follow the advice in Knowledgebase article 11702 to correct the YTD amounts.

Fixes in Both Editions

Version 24.2 includes the following software fixes in both the U.S. and Canadian editions:

General Ledger fixes

- When setting up Sage Bank Feeds in the **1-5 Bank Reconciliation** window, you no longer receive an error when trying to log in to your bank. If you receive a message from Windows Defender Firewall, click **Allow Access** to continue to log in.

- Sage 100 Contractor prevents you from editing certain fields on an invoice that has a Prior Year period if the original transaction would need to be voided and replaced. Because the original transaction no longer exists in the books, it cannot be voided, so an audit error would result. The program does not prevent you from changing fields where editing does not cause this issue.

Accounts Receivable fixes

- Progress bills no longer include time and material costs that have a billing status of **2-Not Billable** when you update the total completed automatically from billing totals.

- When you post a time and material billing that has a zero total, Sage 100 Contractor posts the transaction to general ledger as Void, so it matches the related invoice.

Payroll fixes

- If you try to archive payroll that has unposted records, you receive a warning, but you can still archive the payroll. This flexibility is intended for companies that use a third-party payroll service to process payroll. (Be aware that archiving payroll removes the year's payroll records from the selected company, so they are not available for processing later.)

- When you delete a paygroup in the **5-3-4 Paygroups** window, Sage 100 Contractor automatically deletes the benefits for the paygroup. You don't have to remove each one manually first.

- You can delete employee records that have associated equipment costs or job costs. The costs remain intact, but the reference to the employee will be removed from the cost record.

- When you post a payroll record that includes a calculation with the tax type **0-None** and the calculation method **2-% Total Taxable Wages**, as well as another calculation that adjusts gross pay (either a taxable add-on or a non-taxable deduction), expenses for the main calculation are fully allocated to each timecard line. Previously, the other calculation caused a misallocation of residual amounts to overhead.

- Pay stubs can now include up to 40 deductions, providing the report format has sufficient room.

Miscellaneous fixes

- Sage 100 Contractor no longer allows you to enter inactive general ledger accounts in any data entry windows. You can still query and create reports for inactive accounts.

- When you build a query or a report this information is now available to select: DT39777_Raise_HireHistNotAvailForQueries)

  - The Raise History and Hire History grids, and the Alaska Domicile fields are now available under Employee.

  - The Vendor Certificates grid is now available under Vendors.

  - The Inventory Serial Numbers grid is available under Parts.

- When creating a report, if you name a calculated field with exactly the same name as a text field elsewhere on the report, the text no longer references the calculation and remains independent.

- Scheduled reports now retain the paper size you selected.

- When you remove service invoices from your company database, the work order number is removed from all records that reference it, in case you reuse the order number in the future. The referencing records remain intact—just the order number is removed.

Fixes for the U.S. Edition

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

- When you import standard calculations into a new company, the default FUTA rate is correct (0.6%, entered in the application as 0.6).

- When a payroll record for a salaried employee includes a line for miscellaneous pay (for example, you are paying a bonus to the employee), the program now calculates local payroll taxes correctly.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- When you override the workers compensation payroll calculation when paying out vacation, the amount posted to the overhead account matches the calculation.

- The Workers' Comp report runs correctly when there are payroll records that have vacation payouts and salary amounts.

- GST, PST, and HST are calculated properly on invoices where you have edited the price or the quantity and the invoice is not linked to a PO or subcontract.

- Column headers in lookup windows now show **Province** and **Postal Code**, not State and Zip, even when you use the U.S. date format.

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

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

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

Summary of enhancements by version

Enhancements by version	U.S. Only	Canada Only	API
Version 24.1 enhancements (For details, see the v24.1 Release Notes)			
• Account distributions on direct deposit pay stubs			
• GL Transaction Source Security			
• Payroll Admin security			
• Ability to import client contacts into a job			
• Ability to set rules for editing purchase orders			
• Ability to use Twilio as your email method			
• Ability to view user activity			
• Easily identify invoiced work orders on the Dispatch Board			
• Attribute wages and withholding tax for reciprocal state income tax	x		
• Standardized Occupation Code (SOC) in employee records	x		
• Many more improvements that customers asked for			
Version 23.3 enhancements (For details, see the v23.3 Release Notes)			
• New Aatrix 1099-NEC Forms	x		
Version 23.2 enhancements (For details, see the v23.2 Release Notes)			
Many customer-requested enhancements for both editions, including (and this is only a partial list):			

Enhancements by version	U.S. Only	Canada Only	API
• A new window for printing deposit slips			
• Ability to add custom email messages for direct deposits			
• Ability to change jobs on computed payroll records			
• Better sorting on grids			
Version 23.1 enhancements (For details, see the v23.1 Release Notes)			
Simple Time Entry			
Sage Time mobile app			
Easily Allocate Inventory-Related Use Taxes	x		
Version 22.4 enhancements (For details, see the v22.4 Release Notes)			
Enhancements for 2020 1099 Reporting	x		
Enhancements for 2020 ACA Reporting	x		
Support for new T4 requirements related to COVID reporting		x	
Version 22.3 enhancements (For details, see the v22.3 Release Notes)			
Reports on stored personal information			
Support for new W-4 forms	x		
Support for COVID-19 related absences and wages			
Version 22.2 enhancements (For details, see the v22.2 Release Notes)			
Integration with eTakeoff Dimension			
Refinements for 'Use Taxes'	x		
Support for Equal Employment Opportunity Commission (EEOC) Reports	x		
Version 22.1 enhancements (For details, see the v22.1 Release Notes)			
Command-level security for many options and Post commands			
Ability to save final reconciliations for later access			
Ability to transfer amounts between bank accounts			

Enhancements by version	U.S. Only	Canada Only	API
Warning when posting an AP invoice with no subcontract			
Ability to view Sage messages in Sage 100 Contractor			
Job templates to use and reuse in takeoff			
Ability to report on use taxes	x		
New payroll type for retiring allowances		x	
Several additional customer-requested enhancements			
Version 21.3 enhancements (For details, see the v21.3 Release Notes)			
Some minor enhancements plus U.S. tax updates.			
Version 21.2 enhancements (For details, see the v21.2 Release Notes)			
Ability to merge client records			
Ability to merge vendor records			
Ability to include a record's attachments when you email forms			
Ability to email statements to jobs and clients			
Ability to record external vendor payments			
Ability to specify a secondary backup location			
Ability to track vendor certificates by job			
More ways to list vendor invoices to pay			
Version 21.1 enhancements (For details, see the v21.1 Release Notes)			
Bank feeds			
Ability to email direct deposit stubs at a later date			
Enhanced cost type validation			
Enhanced Search (Find) in the 9-5 Jobs window			
Ability to move company to a new drive			
Ability to view an employee's pay raise history			
Ability to create timecards for individuals in Daily Payroll			
Ability to create payroll records for salaried employees			
Ability to restrict exclusive access for specific non-administrative users			

Enhancements by version	U.S. Only	Canada Only	API
Version 20.7 enhancements (For details, see the v20.7 Release Notes)			
Ability to print a new 5-1-8-86 Vacation Hours Earned and Used Report	x		
Version 20.6 enhancements (For details, see the v20.6 Release Notes)			
New Server Management Tools			
Ability to set records "Inactive"			
More efficient login			
Ability to replace Cost Codes, Vendors, Tasks, or Inventory Locations in a takeoff			
New Combined Accounts Receivable and Service Receivables aging reports			
Ability to print Accounts Receivable Aging Reports by Invoice Date			
Ability to print Accounts Payable Aging Reports by Invoice Date			
Ability to print Service Invoice Aging Reports by Invoice Date			
New banking categories you can assign to bank-related journal transactions			
Improved vacation tracking	x		
Version 20.5 enhancements (For details, see the v20.5 Release Notes)			
Ability to use new custom fields in most windows			
Ability to tag rows for followup in the 9-5 Takeoffs grid			
Audit Information is available in Advanced Company Settings			
Numeric fields provide automatic calculation			
Easier access to user subfolders in workgroups			
Ability to correct the period of a posted payroll transaction			
Ability to skip automatic calculation during takeoff			
Ability to filter cost codes by Job and Phase in lookup windows			
Ability to filter unassigned work orders on the Dispatch Board			
A new option for saving and selecting company-specific custom reports and forms			

Enhancements by version	U.S. Only	Canada Only	API
Ability to use a new standard calendar to select dates			
Support for Microsoft SQL Server 2016 and Windows 2016 Server			
Ability to copy user process maps			
Ability to use high contrast display settings for Windows 10			
Ability to print a new Payroll Check Register 5-1-2-31 by check date			
3-7 Progress Billing and 12-2 Inventory Allocation allow 5,000 rows			
Tax and Workers' Comp rates in 4-4 and 4-2 use 4 decimal places	x		
Workers' Comp Reports 21, 86, and 96 show Overtime Hours	x		
Version 20.4 enhancements (For details, see the v20.4 Release Notes)			
Ability to copy external files to other users			
New option to approve the removal of employee records			
Version 20.3 enhancements (For details, see the v20.3 Release Notes)			
Ability to view change history in records			
New option for closing purchase orders automatically			
Support for Paya Exchange Desktop 2.0			
Support for customized tables and views			
Ability to use a new window to add client service locations quickly			
Effective rate shown for Sales Tax Districts (U.S. only)	x		
API supports adding and removing attachments			x
API enforces locks			x
Schema change for Global Variables			x
Version 20.2 enhancements (For details, see the v20.2 Release Notes)			
Simplified schedules lookup			
QueryJobCost (API Enhancement)			x
SetExclusive (API Enhancement)			x

Enhancements by version	U.S. Only	Canada Only	API
Version 20.1 enhancements (For details, see the <u>v20.1 Release Notes)</u>			
More versatile lookup windows			
Unique Payroll record numbers			

Known issues and comments

The following sections describe known issues and problems in Sage 100 Contractor Version 24.2.

Compliance and Payroll Checks

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

Internet access required for Sage 100 Contractor

Sage 100 Contractor features, such as printing or efiling tax forms, submitting enhancement requests, accessing Help, or downloading periodic product or tax updates all require Internet access.

To take advantage of these features, ensure that any workstation or server that Sage 100 Contractor is installed on has access to the Internet.

During installation of Sage 100 Contractor, the computer serving as the Sage license server must be able to connect to the Internet to obtain licenses. Once installation is complete, you can check out license uses for each computer where Sage 100 Contractor is installed, then disconnect the Sage license server from the Internet.

Configuring anti-virus software and third-party firewalls

During installation of the Sage 100 Contractor Hosting Framework, the Windows Firewall is configured automatically to enable the Sage 100 Contractor Hosting Framework to act as a TCP server. If you use some other firewall, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following procedure to configure the Windows Firewall manually to allow the Sage 100 Contractor Hosting Framework to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

1. Click **Start > All apps > Control Panel > System and Security**.

2. Open **Windows Firewall**, and then select **Allow a program or feature through Windows Firewall**.

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

> **Note:** By default, the exception is set to allow access by any computer on the network. You can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Files to exclude when manually configuring your firewall for Windows 8.1 Professional and Windows 10 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL

- C:\Program Files\Sage\Sage 100 Contractor SQL

- C:\ProgramData\Aatrix Software

- C:\Program Files\Aatrix Software

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor SQLdata. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 8.1 Professional and Windows 10 Professional 64-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Aatrix Software

- C:\ProgramData\Aatrix Software

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Software and hardware required to support Microsoft SQL Server

Version 24.2 requires an instance of Microsoft SQL Server. You can download and use Microsoft SQL Express at no charge, or you can use the full version of Microsoft SQL Server. You can even start using Microsoft SQL Express, and upgrade to the full version of Microsoft SQL Server later, if necessary.

When you first open the new Database Administration tool, the program tries to configure an instance of Microsoft SQL Server with optimal settings for Sage 100 Contractor for you. If you do not already have an instance of Microsoft SQL Server, you can let the Database Administration tool download, install, and configure Microsoft SQL Express for you.

Refer to Knowledgebase article 115593 for detailed information about supported operating systems and software, and for minimum hardware requirements.

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

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

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

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

About .NET Framework

.NET 4.8 Framework is required

If Microsoft .NET 4.8 Framework is not already installed, it will be installed automatically when you install Sage 100 Contractor. Installation of .NET 4.8 Framework alone may take up to 20 minutes per computer.

Make sure that both your client and server computers meet the minimum requirements for installing both Sage 100 Contractor software and .NET 4.8 Framework.

> **Note:** If Sage 100 Contractor requires an installation of .NET 4.8 Framework, the Sage 100 Contractor installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, you must do so to continue the Sage 100 Contractor installation.

.NET 3.5 is also required

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

Turning on Microsoft .NET 3.5

Microsoft .NET 3.5 must be available and enabled prior to installing Sage 100 Contractor.

If you attempt to install Sage 100 Contractor without .NET 3.5 installed, you receive the following message during the licensing install:

> "Sage.CRE.HostingFramework.Service v3.2 has stopped working."

When you click [**OK**], the installation continues, but the services have not been installed so Sage 100 Contractor cannot open. The Sage.CRE.HostingFramework Service does not install unless .NET 3.5 is installed. If you receive the above message during installation, install .NET Framework 3.5., and then reinstall Sage 100 Contractor.

The following instructions are for Windows Server 2008 R2.

To verify that .NET 3.5 is installed:

1. Click the **Start** button in the lower left corner of the display.

2. Highlight **Administrative Tools** and select **Server Manager**.

3. In the **Server Manager** interface, click **Features** to display all the installed Features in the right-hand pane. Verify that .NET Framework 3.5.1 is listed.

To enable .NET 3.5:

1. In the **Server Manager** interface, select **Add Features** to display a list of possible features.

2. In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.

3. Once you expand **.NET Framework 3.5.1 Features**, you will see two checkboxes. Check the box next to .NET Framework 3.5.1 and click **Next**.

4. In the **Confirm Installation Selections** interface, review the selections and then click [**Install**].

5. Allow the installation process to complete and then click [**Close**].

> **Note:** Enabling .NET Framework 3.5.1 may require a reboot.

About network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. By default, Sage 100 Contractor uses the TCP starting port 48760. Certain configurations can potentially disable the communication:

- You must enable file sharing on your computers. To enable file sharing, follow the instructions in the Windows Help.

- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.

- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

PCI DSS Compliance

PCI DSS stands for Payment Card Industry Data Security Standard. It was developed by the major credit card companies as a guideline to help organizations that process card payments to prevent credit card fraud, cracking, and other security weaknesses and threats.

A company processing, storing, or transmitting payment card data must be PCI-compliant or risk losing its ability to process credit card payments and being audited and/or fined. (For more information about PCI standards, see https://www.pcisecuritystandards.org/.)

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

Integrating your financial and operations system with Paya lets you process check and credit card transactions without storing your customers' sensitive card information in your database. Paya Exchange transmits check and credit card details through a secure connection to Paya, where they are stored in a PCI-compliant vault, protecting your from exposure to non-compliance penalties and credit card fraud.

> **Caution!** To avoid non-compliance with PCI standards, do not store credit card information in Sage 100 Contractor. Such storage creates unnecessary risk for your business and your customers.

Tax Forms and eFiling by Aatrix configuration requirements

Tax Forms and eFiling by Aatrix requires an Internet connection for two reasons:

- For updating forms and executable files.

- For electronic filing (eFiling) of the forms.

If you experience an Internet connection problem, it may be due to problems communicating through an Internet firewall. Firewalls need to have access allowed through specific ports:

- The Tax Forms and eFiling Updater uses standard SSL/HTTP port 80 to access the site http://updates.aatrix.com.

- The eFiling component uses secure HTTPS on port 443 to access the site https://efile.aatrix.com.

By allowing access to aatrix.com, you allow both updates and eFiling. Occasionally, restrictions are tighter and only allow access to these ports by specific programs. Tax Forms and eFiling uses the following programs to access the Internet.

For updating using http on port 80 to http://updates.aatrix.com:

- aatrixforms.exe
- updater.exe
- updater2.exe

For eFiling using secure http on port 443 to https://efile.aatrix.com:

- builder.exe
- viewer.exe

Use Adobe Reader Version 8.1.3 or later for faxing

Customers have reported problems faxing from Sage 100 Contractor with versions of Adobe Reader earlier than 8.1.3. Adobe Reader Version 8.1.3 and later support faxing from Windows and from Sage 100 Contractor.

> **Important!** To fax from Sage 100 Contractor, the Windows Fax Service component must be installed with your Windows operating system. For more information about installing the Windows Fax Service component, see the Sage 100 Contractor Help topic, "Installing the Windows Fax Service component."

Configuring Windows regional and short date format

To specify regional formats for Windows:

1. Click the [Start] button, point to **Control Panel**, then click **Clock, Language, and Region** .
2. Click **Region and Language**.
3. On the **Formats** tab, select the format for your country.
4. Under **Date and time formats**, from the Short date format drop-down list, select the format used for your country.
5. Click [OK].
6. Close the **Clock, Language, and Region** window.

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

If the computer you are using as a license server goes into sleep mode, other computers on the network cannot obtain a license.

To avoid this possibility, set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never":

1. In Windows 8.1 Professional, Windows 10, or Server 2012 Standard, click **Start > All apps > Control Panel > System and Security > Power Options**.

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

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

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

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 8.1

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 8.1 Professional or Windows 8.1 Enterprise operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.