



Sage 100 Contractor 2023 (SQL)

Version 25.1 Release Notes

Canada and U.S. Editions

May 2023

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Installation Notes

Compatibility with Sage Estimating

Important! Sage 100 Contractor version 25.1 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 25.1 until you install Sage Estimating version 21.1, or later.

Enhancements in Version 25.1

This section describes the new features and enhancements you will find in version 25.1.

We've been listening to you!

Sage thanks you for your product ideas! In version 25.1, we've 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

- With Version 25.1, you can create a positive pay file to submit to your bank.

You use the new **1-11 Positive Pay File** window to create these files and you use the **1-11 Positive Pay Settings** window, opened from the **1-11 Positive Pay File** window, to specify the format your bank requires for positive pay files.

For more details about these changes, see [Positive Pay offers protection against fraud](#), later in this document.

Thank you for this suggestion, Rik M., and many customers who supported this idea.

- You can now edit posted credit card transactions, as follows:
 - In the **1-3 Journal Transactions** window, you can unlock and edit credit card transactions if they have no vendor.
 - In the **4-7-5 Reconcile Credit Card Accounts**, if you have Company Admin rights, when you drill down to a credit card receipt using the **[Go to Transaction]** button, if the receipt has a vendor, you can choose to view and edit the AP invoice.

Thank you for this suggestion, Raina S.

Accounts Payable

- In the **4-7-3 Credit Card Receipts** window, you can use new **Purchase Order#** and **Subcontract#** fields to apply payments to a subcontract or purchase order. You can also set options to warn you if the invoice you are paying exceeds the tolerances set for subcontracts or purchase orders, similar to the warnings in the **4-2 Payable Invoices/Credits** window.

Thank you for this suggestion, Janet L. and Nora M.

- In the new **4-7-7 Import Credit Card Transactions** window, you can use Sage Bank Feeds to download credit card transactions automatically, or you can download transactions to an Excel or CSV file and then copy the transactions to the grid.

For more information about this new feature, see [Importing Credit Card Transactions](#), later in this guide.

Thank you for this suggestion, Richie W.

- You can also use Bank Feeds to download and match credit card transactions in the **4-7-5 Reconcile Credit Card Accounts** window, similar to the matching function in the **1-5 Bank Reconciliation** window.

For more information about this new feature, see [Reconciling downloaded credit card transactions](#), later in this guide.

Thank you for this suggestion, Jenn R.

Positive Pay offers protection against fraud

Positive pay is a service your bank may offer to help guard your company against fraud. If you pay your vendors and employees by check, you can submit a file containing the details of those payments to your bank. This file is the positive pay file.

When someone presents a check drawn on your bank account, the bank compares the information in the positive pay file with the paper check. If there are any inconsistencies, the bank can alert you.

Note: Checks you produce in the 1-3 Journal Transactions window are not included in positive pay files.

You use the new **1-11 Positive Pay File** window to create positive pay files for checks your company issues.

You use the new **1-11 Positive Pay Settings** window to specify the format and other settings that your bank requires for your positive pay files.

Setting up accounts to use positive pay

Before you can generate positive pay files for your general checking, accounts payable, or payroll checking account, you need to define some settings that Sage 100 Contractor will use to create positive pay files for that account.

There is not much consistency among banks about the formats they require, so Sage 100 Contractor provides some flexibility to tailor the format for your own needs.

You use the settings in the **1-11 Positive Pay Settings** window to specify, for each general ledger checking account:

- The file format that the bank requires (comma delimited or fixed-length text) and the fields to include.

If you select **2-Fixed Text File**, you specify the length of each field, with a maximum length of 99 characters.

Notes: For fixed text files:

- If the Bank Account# or Check# entry exceeds the specified length, Sage 100 Contractor trims it accordingly.
- If the Bank Account# or Check# entry is less than the specified length, Sage 100 Contractor inserts zeroes to the left of the entry to match the required length for the field.

- Sage 100 Contractor inserts zeroes to the left of the amount to match the required length.
- If the Payee 1 or Payee 2 field is less than the specified length, Sage 100 Contractor inserts spaces to the right of the payee to match the required length.

- The account number and routing number for the bank from which you make payments.
- The check date format your bank requires for positive pay files.
- A character to indicate an issued check (for example, "I"). You need to specify an indicator if you include an **8 - Check Type Indicator** field in the file format.
- A character to indicate a voided check (for example, "V"). You need to specify a void indicator if you select the **Include Voided Checks** check box.
- Whether to allow blank payee fields and combined payees.
- Whether to include a header row in the file.

Creating a positive pay file

After you issue checks, you use the **1-11 Positive Pay File** window to generate a positive pay file for the account from which you made the payments.

Before you start

- Find out what format your bank requires for the positive pay file.
- Set up the general ledger checking account to use positive pay.

Important! To be included in a positive pay file, the transaction number assigned to a check needs to be numeric. Checks with check numbers that include non-numeric characters or spaces are not included in positive pay files.

To create a positive pay file:

1. Open the **1-11 Positive Pay File** window.
2. In the **Checking Account** box, select the general ledger account number.
3. If you have not set up the account to use positive pay, click the **[Settings]** button to open the **1-11 Positive Pay Settings** window where you can specify the required format and other settings for your positive pay file.
4. Select options to include AP checks, payroll checks, and other checks, as needed.

Note: If your company uses Payroll Admin security, you need Payroll Admin rights to create a positive pay file for payroll checks.

5. Select the range of checks you want to include in the positive pay file. You can select one of these options:
 - **Include only unreported checks starting from check date**, and then specify the earliest check date you want to include. The positive pay file will include all checks that you have not submitted previously that were processed on the specified date to the current date.
 - **Include checks dated** and then specify the start and the end of the check date range. If you select this option, you can also select **Include previously reported checks**.

You would select this option to create a replacement positive pay file, for example.

6. Click **[Create File]**.

Alternatively, you can click **[Open in Excel]** to save the information in an Excel file, where you can edit it, as needed. (For example, if your bank requires additional information that is not captured in the Create File process, you can add another column.)

Note: Sage 100 Contractor marks transactions as reported when you select **[Create File]**.

Importing credit card transactions

In the **4-7-7 Import Credit Card Transactions** window, you can use Sage Bank Feeds to download credit card transactions automatically to Sage 100 Contractor.

You can also download credit card transactions directly from your bank to an Excel or CSV file, edit the data, and then copy the transactions to the grid, or you can type the transactions into the grid.

Important! Bank Feeds can connect to one credit card account per card issuer (bank). If you use Bank Feeds to download transactions from a bank for which you have more than one credit card, you need to create separate card issuer accounts for each credit card number so that you can import and reconcile transactions for all the credit card accounts. For example, say you have 2 VISA credit cards from one bank, each with a unique number:

- XXXXXXXXXXXXX9256
- XXXXXXXXXXXXX9214

You could set up 2 separate card issuer accounts (in the 4-7-1 Card Issuers Accounts window), like this:

- 2005 - Visa 9256
- 2006 - Visa 9214

Then, add the corresponding credit card to each issuer account in 4-7-1 Card Issuers Accounts.

If multiple card holders share an credit card number, you do not need to set up separate general ledger accounts or separate issuers. You can import credit card transactions for a single general ledger account if there is only one credit card account number to reconcile.

To connect your credit card account to the issuing financial institution using Sage Bank Feeds:

1. Open **4-7-7 Import Credit Card Transactions**.
2. Select a card issuer account, and then:
 - a. (Optional) Select a cutoff date.

Sage 100 Contractor does not display transactions entered after this date.
 - b. On the **Banks Feeds** menu, click **Connect to Bank Feeds**. Alternatively, you can select the **Import using bank feeds** option and then click **Yes** in the message asking whether you want to connect now.

When the account is connected, only the Disconnect option is available from the Bank Feeds menu.
3. Follow the instructions in the **Bank Feed** wizard to connect to your bank.

Note: The start date for the earliest transactions to download must be within the past 2 years.

4. When the credit card account is connected, click [**Display Items**] to retrieve credit card transactions. Transactions you downloaded previously are not downloaded again.

Note: You only need to connect the credit card account to Bank Feeds once, unless you disconnect it later. With a connected account, you simply use the **Display Items** button to download new credit card transactions for the account in the future.

Adding imported credit card transactions to Sage 100 Contractor

With the transactions loaded in the grid, you can choose which transactions to add to your company data.

Important! If multiple card holders share an account number, you should not add imported payments to the credit card company. Say, you pay off the credit card using the **4-7-6 Pay Credit Cards** window. The payment is now included in your company

records. If you include the payment again when you import credit card transactions, you will create a duplicate payment record. You should, instead, remove the payment transaction from the import grid (using the **[Remove]** button) so that you will not import the payment again, or at least do not select **Include** for the payment.

To add imported credit card transactions to Sage 100 Contractor:

1. For each transaction you want to add:

- a. Identify the credit card subaccount that incurred the expense or cost.
- b. Double-click in the **Include** column, or select the row and then click **[Include]**.

To remove the checkmark from the Include column, double-click again in the column, or select the row, and then click **[Exclude]**.

- c. Add distribution details for the transaction, as follows:
 - i. Enter the account or the account and subaccount to charge in the grid.
 - ii. If you need to keep detailed information about the transaction (for example, the vendor, job cost allocations, use tax, whether it is PO- or subcontract-related) or if you need to save the transaction to multiple ledger accounts, click **[Add Detailed Receipt for Row#]**, and then enter and save transaction information as you would for any credit card receipt.

If the account you entered is a direct expense account, you can enter the Job, Phase, Work Order Number, Job Cost Code, and Job Cost Type.

If the account you entered is an equipment expense account, you can enter the Equipment, Equipment Cost Code, and Equipment Cost Type.

- d. When you finish selecting transactions to include, click **[Save]**.

For each **Included** transaction, Sage 100 Contractor creates separate general ledger transactions and any required job and equipment cost records.

Important! If you enter credit card receipts or payments manually, these transactions may be duplicated when you import transactions using Bank Feeds.

You can remove duplicates using the **Match Credit Card Transactions** window in **4-7-5 Reconcile Credit Card Accounts** or the **4-7-7 Import Credit Card Transactions** window—or you can choose not to include them in the **4-7-7 Import Credit Card Transactions** window.

To avoid duplication, either import transactions using Bank Feeds or enter them manually.

Reconciling downloaded credit card transactions

In the **4-7-5 Reconcile Credit Card Accounts** window, you can use Sage Bank Feeds to connect your card issuer account to the issuing financial institution, and then automatically download and reconcile credit card transactions. The process is similar to reconciling in the **1-5 Bank Reconciliation** window, except you connect to a credit card account and then add selected credit card transactions to your company records using the **4 7-3 Credit Card Receipts** window.

First, you need to connect your credit card account in Sage 100 Contractor to the issuing financial institution, so that you can download transactions to your computer.

Then, you match downloaded transactions with existing credit card transactions in Sage 100 Contractor and add unmatched transactions to **4 7-3 Credit Card Receipts**. Sage 100 Contractor attempts to match uniquely identifiable transactions automatically for you. Downloaded transactions are matched automatically with transactions in Sage 100 Contractor if they:

- Are unique. (Very similar or duplicate transactions in your system cannot be matched automatically.)
- Have the same payee and amount.
- Are dated earlier than the corresponding bank transaction.

Connecting your Sage 100 Contractor credit card account to your financial institution

You need to configure a Sage Bank Feeds connection before you can download and reconcile credit card transactions in Sage 100 Contractor. You can connect a credit card account using the **4-7-7 Import Credit Card Transactions** window or the **4-7-5 Reconcile Credit Card Accounts** window.

To connect your credit card account to the issuing financial institution:

1. Open **4-7-5 Reconcile Credit Card Accounts**.
2. Select a card issuer account, and then:
 - a. (Optional) Select a statement cutoff date. Sage 100 Contractor does not display transactions entered after this date.
 - b. On the **Banks Feeds** menu, click **Connect to Bank Feeds**.
3. Follow the instructions in the **Bank Feed** wizard to connect to your bank.
4. When the credit card account is connected, click [**Display Items**] to retrieve credit card transactions.

Transactions you downloaded previously are not downloaded again.

When you connect a Sage 100 Contractor credit card account to the account at the financial institution, Sage automatically downloads credit card transactions up to the statement cutoff date, if you specified one.

Note: You only need to connect the credit card account to Bank Feeds once, unless you disconnect it later. With a connected account, you simply use the **Display Items** button to download new credit card transactions for the account in the future.

After you display credit card transactions, they appear in the **Match Credit Card Transactions** window, with automatically matched transactions in the lower portion of the window. Any unmatched transactions appear in **Transactions from your bank** and **Transactions from Sage** lists at the top of the window. You need to match these transactions manually.

Manually matching transactions to finish the reconciliation

To finish the reconciliation, you need to match any transactions remaining in the top part of the window manually, as follows:

1. Select an unmatched banking transaction on the left side of the window and then click the corresponding Sage 100 Contractor transaction (or transactions) on the right side of the window.
2. Use the buttons in the window to reconcile the transaction, as follows:
 - **Remove.** You use this button to remove a selected transaction from the bank transaction list. For example, if you downloaded a credit card transaction that you reconciled previously, it is no longer outstanding, so you can remove it from the transactions to be reconciled.

Notes:

- Removing the transaction from the bank transaction list does not affect your Sage 100 Contractor transactions.
- Removed transactions will not be imported again.

If the transaction was matched previously, the Sage transaction appears in the **4-7-5 Reconcile Credit Card Accounts** window as a manually matched transaction.

- **Add to Sage.** You use this button to add a selected bank transaction to Sage 100 Contractor.

If no Sage 100 Contractor transaction matches a downloaded transaction, you need to determine whether the downloaded transaction is a legitimate charge to your account. Add valid transactions using the **4-7-3 Credit Card Receipts** window.

- **Match.** When matching bank transactions manually, you can select one or more Sage transactions. (To select several Sage transactions, hold the **Ctrl** key down as you select transactions from the list.) When the amount of the selected Sage transactions equals the bank transaction, the **[Match]** button becomes available.

Clicking [**Match**] moves the selected transactions to the list of matched transactions.

- **Unmatch.** If you make a mistake while matching or if an automatic match is not correct, you can select the matched bank transaction and then click [**Unmatch**] to remove the bank transaction and the Sage transaction(s) from the list of matches. This operation removes the transactions to the upper part of the window, where you can match them with other transactions.
3. Repeat steps 1 and 2 for each unmatched transaction, until all the transactions are matched.
 4. Click [**Confirm Matches**] to apply your changes and return to the **4-7-5 Reconcile Credit Card Accounts** window.

Sage 100 Contractor marks automatically matched transaction with a double check mark, indicating that they have been cleared through the Bank Feeds matching process.

If you clear the check marks for a transaction, both the bank transaction and the previously matched Sage transaction are restored to the **Match Banking Transactions** window, where you will need to match them manually.

5. Save the reconciliation. You can choose to save the reconciliation as a Trial version or a Final version.
 - **If you save a Trial reconciliation**, when you next display the account, if you click [**Display Items**], Sage 100 Contractor shows all previously matched transactions and any new transactions in the **4-7-5 Reconcile Credit Card Accounts** window.

Providing you do not do a Final save of the bank reconciliation, you can click **Bank Feeds > Match Banking Transactions** at any time to return to the **Match Banking Transactions** window and continue the reconciliation process.

- **If you save a Final reconciliation**, previously matched items are no longer available for reconciliation.

Using an older version of SQL Server?

It is good practice not to delay important upgrades of your software, which help to keep your data secure and your computer performing efficiently.

When you log in to Database Administration after upgrading to version 25.1, if the program detects that your SQL Server instance is using an Express edition that is earlier than SQL Server 2019 Express, it will display a new **Upgrade SQL Server Instance** tab that invites you to upgrade your instance. For now, you can use version 25.1 without upgrading SQL server. However, you may need to upgrade before the next Sage 100 Contractor update.

As Microsoft makes future cumulative updates available, you can easily install them from this tab.

Note: If you do not use an Express edition of Microsoft SQL Server, Database Administration does not display this tab automatically when you log in. However, you can display the tab to see which version of SQL Server your instance is using and which version of SQL Server we recommend that you use. (Select **Server Management > Upgrade SQL Server Instance**.) You can then install the recommended version, as needed.

Enhancements for the U.S. Edition

Sage 100 Contractor Version 25.1 includes the following enhancements specifically for the U.S. Edition:

U.S. Payroll Tax Tables

Payroll tax tables have changed for the following jurisdictions:

- Idaho
- Utah (effective June 1, 2023)

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

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 25.1

Fixes in Both Editions

Version 25.1 includes the following software fixes in both the U.S. and Canadian editions:

General Ledger fix

- In the **1-5 Bank Reconciliation** window, when matching bank transactions you add using Bank Feeds, you can enter job and equipment costs, depending on the account you use as the offset account.

Accounts Receivable and Services Receivable fixes

- When you void an Accounts Receivable or Service Receivable receipt, and then void the reversal, Sage 100 Contractor checks the calculated invoice balance. If the balance is zero, it updates the invoice status to 4-Paid. If the balance is not zero, it updates the invoice status to 1-Open.
- In the **3-3-1 Cash Receipts** and **3-3-2 Receivable Invoices/Credits** windows, the Record# field is now required in the Contract Invoices lookup window.

In the **11-2 Work Orders/Invoices/Credits** window, the Record#, Order#, and Invoice# are now required fields in the Service Invoices lookup window and cannot be hidden.

These changes ensure that these columns are available when they are needed in a lookup window even if they are not needed in other lookup windows.

- In the **Budget With Approved Changes** window, opened from **3-5 Jobs**, cost codes that use decimals are now formatted properly.
- In the **3-5 Jobs** window, when you delete a closed job, the program removes the WIP subaccounts associated with the job if the job's WIP subaccounts have no balances and no ledger transactions (including voided transactions).

If a job has a WIP subaccount that cannot be removed (because it has a balance or ledger transactions), the job will not be removed.

Accounts Payable fixes

- In the **4-3-1 Select Invoices to Pay** grid, you can redisplay a hidden **Set To Pay** column by selecting the column in the **Show/Hide Columns** window.
- In the **4-3-2 Pay Vendors** window, Sage 100 Contractor stops you from posting an Accounts Payable payment to a period earlier than the invoice posting period. This is to help ensure that you can archive a previous year.
- You can edit posted AP Invoices if you have only **Save** and **Void** rights. You no longer need **Change Period** rights.
- After viewing transaction detail using the **4-7-5 Credit Card Reconciliation** window, you are returned to the same row on the grid for the transaction you just viewed.

Payroll fixes

- In the **5-2-2 Payroll Records** window, you can change the accounting period for a posted payroll record without also entering a checking account.
- In the **5-2-5 Direct Deposit File Manager** window, you can add direct deposit transactions that you retracted previously to a new direct deposit file by selecting a new **Include posted payroll records** check box when you create a direct deposit file.
- In the **5-4-1 Federal Forms** window and the **4-5 Vendor 1099 Forms** window (**4-5 Vendor T-5018 Forms**, in Canada), the Year selector works properly even if the system date format contains hyphens ("-") rather than slashes ("/").
- You now need to enter a check date in the Check Date field when creating timecards using the **5-5-1 Daily Payroll Entry** window or the **5-6-5 Create Timecards** window because the Check Date field is required in the resulting payroll record.
- In the **5-6-6 Time Entry Settings** window, you can no longer enter a future date in the **The first pay period paid in the current year ended on** box.

Project Management fixes

- The <<New Contract>> calculated fields used in the system **6-4-2-31 Prime Change** and **6-4-2-32 Prime Change** report forms are now correctly formulated and the reports print correctly.
- In the **6-7-1 Subcontract** window, when you open the Cost Codes selection window, the program continues to operate properly even if the AP invoice was created from a subcontract that has blank lines.

Scheduling fix

- The Gantt chart in the **10-3 Schedules** window displays task properties again.

Inventory fix

- When an inventory item has a very small average cost (less than a penny) you can use the item, and reverse or void transactions that use the item.

Miscellaneous fixes

- When specifying numeric selection criteria for reports and queries using alphanumeric characters (for example, by typing the name of a job, vendor, employee, and so on), if you type the starting letters for a record, and then press **Enter**, the program displays the first **active** record that begins with those letters. Previously, the program could display an inactive record that began with the same characters. If you need to find or select an inactive record, you can still type the number or use the F5 key to display all the records, and then select the inactive record from the list.
- Scheduled reports that use a Legal paper size option retain that option when they are emailed.
- You can no longer log in to Sage 100 Contractor and Database Administration with Windows authentication when using a Microsoft account. You need to log in with SQL Server Authentication.

- When you close an Important note by pressing the **Esc** key or the **Enter** key, you are left in the field you were in before you closed the note.

Fixes for the U.S. Edition

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

- Certified reports can report negative hourly rate for cash fringe benefits.
- Local Tax Details are not deleted from a payroll record when you override a local tax calculation.
- The 5-1-5-21 Workers Comp Report and the 5-1-5-82 Workers Comp Report for Nevada include only employees for the reporting year determined when you run the report.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- The **ACA Covered Individual** table and fields no longer appear for the Employee table when you create or edit a query or report.
- When you compute payroll, you no longer receive a warning about an incorrect calculation maximum for calculations using PPIP Tax Types.
- In the **4-4 Vendors** window, the T5018 Balances by Calendar Year lists balances properly.
- The **5-1-5-21 Workers Compensation** report includes only employees for the reporting year determined when you run the report.

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 for version 24.3

Enhancement (For details, see the v24.3 Release Notes)	U.S. Only	Canada Only	API
• New quarterly and year-to-date reports	x		
• Updated tax tables			

Summary of enhancements for version 24.2

Enhancement (For details, see the v24.2 Release Notes)	U.S. Only	Canada Only	API
• Streamlined pre-built General Contractor Accounts and Subcontractor Accounts			
• The 3-5 Jobs (Accounts Receivable) grid displays changes for each cost type along with original budget amounts			
• Ability to remove computed but not posted time and material invoices			
• Ability to filter on cost codes in some lookup windows in Accounts Payable			

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

Enhancement (For details, see the v24.2 Release Notes)	U.S. Only	Canada Only	API
• Ability to easily display credit card charges and payments in some Accounts Payable windows			
• Ability to keep multiple years of payroll records with your current company			
• Separated payroll close and payroll archive processes			
• A new Default Overtime Over 40 Hours Per Week option in 5-2-2 Payroll Records			
• A new 11-1-10-41 Combined AR/SR Tax Report	x		
• Ability to select records by Transaction for the 2-6-0-21, 2-6-0-31 and 2-6-0-41 Check Register reports			

Summary of enhancements for version 24.1

Enhancement (For details, see the v24.1 Release Notes)	U.S. Only	Canada Only	API
• 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		

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

Enhancement (For details, see the v24.1 Release Notes)	U.S. Only	Canada Only	API
• Standardized Occupation Code (SOC) in employee records	x		
• Many more improvements that customers asked for			

Summary of enhancements for version 23.3

Enhancement (For details, see the v23.3 Release Notes)	U.S. Only	Canada Only	API
• New Aatrix 1099-NEC Forms	x		

Summary of enhancements for version 23.2

Enhancement (For details, see the v23.2 Release Notes)	U.S. Only	Canada Only	API
Many customer-requested enhancements for both editions, including (and this is only a partial list):			
• 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			

Summary of enhancements for version 23.1

Enhancement (For details, see the v23.1 Release Notes)	U.S. Only	Canada Only	API
Simple Time Entry			
Sage Time mobile app			
Easily Allocate Inventory-Related Use Taxes	x		

Known issues and comments

The following sections describe known issues and problems in Sage 100 Contractor Version 25.1.

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 efile 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 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 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 25.1 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 119424 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/.](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. In **Control Panel**, 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. Go to **Control Panel > System and Security > Power Options**.
2. Select **Change when computer sleeps**.
3. From the **Put computer to sleep** list, select **Never**.