# Sage 100 Contractor 2023 (SQL)

## Version 25.2 Release Notes

Canada and U.S. Editions

October 2023

This is a publication of Sage Software, Inc.



Last updated: October 23, 2023

# Contents

# Installation Notes

## Incompatible Windows versions

**Caution!** Windows versions older than Windows 10 and Windows Server 2016 are no longer supported. Do not install this update if you are using Windows 7, Windows 8, Windows 8.1, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, or an earlier version of Windows, or you will not be able to open Database Administration or Sage 100 Contractor.

## Compatibility with Sage Estimating

**Important!** Sage 100 Contractor version 25.2 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 25.2 until you install Sage Estimating version 21.1, or later.

## 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 25.2, 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 25.2 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.

# Update 2 October 2023 (Build 25.2.162)

## Fixes for both editions

We fixed the following issues in both the U.S. and Canadian editions.

- There is an additional fix for the error that occurred when the program determines the next default number for a field like Invoice# or Order#. The last update did not address the situation where *none* of the existing entries are purely numeric values. Update 2 addresses this additional situation.

- You can once again use a third-party program (such as Sage Field Operations) to enter time for salaried employees that do not have an hourly pay rate.

- With the release of version 25.2, when the program determines the next default number for a field like Invoice# or Order#, it now finds the highest existing purely numeric value and adds 1 to determine the next number.

  If you prefer the old method of determining the next number, you can modify a special settings file in the \Sage100Con\Common\Customization folder on the server to direct Sage 100 Contractor to find the most recently used number, instead. For instructions on how to use this file, see Knowledgebase article 231019165854183, "How to change the method used by Sage 100 Contractor to determine the next number to use in a character field for a new record."

  > **Note:** This setting applies to all companies on the server.

## Fixes for the Canadian Edition

The following issue was fixed specifically for the Canadian edition:

- When you reprint Direct Deposit reports or Vendor EFT reports, you no longer receive an error that the file is invalid if you use an RBC Header in your payroll direct deposit or vendor EFT settings.

# Update 1 October 2023 (Build 25.2.148)

This update includes the following software fixes in both the U.S. and Canadian editions.

## Fixes in this update

- You can click in the **Invoice#** text box in **3-10-2 Compute T&M Invoices**, post a billing record in **3-7 Progress Billing**, or create a purchase order from **11-2 Service Work Orders/Invoices/Credits** without receiving an error or experiencing a sudden closure of the program.

  This issue also occurred and was fixed where the F7 Field Property Default entry to is set to **NEXT**; for example in **3-2 Receivable Invoices/Credits** with the Invoice#, **6-6-1 Purchase Orders** with the Order#, **6-7-1 Subcontracts** with the Subcontract#, and **11-2 Service Work Orders/Invoices/Credits** with the Order# or Invoice#.

- You can print checks or direct deposit slips in **5-2-4 Payroll Checks** or the **41-Pay Statement** in **5-2-7 Compensation Slips** without an error.

### Fix for the U.S. Edition

- The program calculates Ohio state income tax withholding correctly. (The original release of version 25.2 was computing too much tax.)

# Enhancements in Version 25.2

This section describes the new features and enhancements you will find in version 25.2.

## We've been listening to you!

Sage thanks you for your product ideas! In version 25.2, 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.

### Accounts Receivable

- In the US edition, in the **3-5 Jobs** window, we added a new **Certified Payroll** tab that contains additional certified reporting fields for Aatrix.

  The **First Payroll Period Ending Date** field on this tab determines the first weekly Payroll Number submission for the job. The report number increases sequentially for each payroll weekly submission until the job is finished, regardless of whether work was done on the job.

  Thank you for this suggestion, Tim M.

### Accounts Payable

- In the United States Edition, you can specify whether a line in a purchase order is subject to sales tax. You use a new **Taxable** column in the grids in the **6-6-1 Purchase Orders** and the **6-11-1 Requests For Proposal** windows to indicate whether a detail line is taxable. A purchase order you create from an RFP will use the same taxability status for its details. The upgrade to version 25.2 will make all purchase order lines and RFP lines taxable if there is a tax district in the record header.

When you create a payable invoice for the purchase order, Sage 100 Contractor uses the taxability of each purchase order detail to calculate the sales tax for the invoice.

> **Note:** During the upgrade to version 25.2, the Taxable column is set to “Y” for any existing PO and RFP lines that have a total amount if there is a tax district in the document header.

Thank you for this suggestion, Walt M.

- We added two new 1099 types for the US Edition:
    - **5 – Medical.** This new type appears in Box 6 on the Aatrix 1099-MISC form.
    - **6 – Dividends.** This new type will appear in Box 1a on the Aatrix 1099-DIV form when it is available near year-end.

  The existing type **5 – No 1099** will be adjusted to **7 – No 1099** during the upgrade to version 25.2.

  Thank you for this suggestion, Jennifer L. and Lourdes D.

- We added a totals row to the **4-1-1-61 Vendor 1099 Report** for the US Edition and the **4-1-1-61 Vendor T5018 Report** for the Canada Edition.

  Thank you for this suggestion, Rik M. and Charlene D.

## Payroll

- You can add, edit, and delete pay types using the new **5-3-10 Custom Pay Types** window.

  For more information about custom pay types, see "Use custom pay types" (page 9), later in this document.

Thank you for this suggestion, Wendy D. and Dawn D.

## Use custom pay types

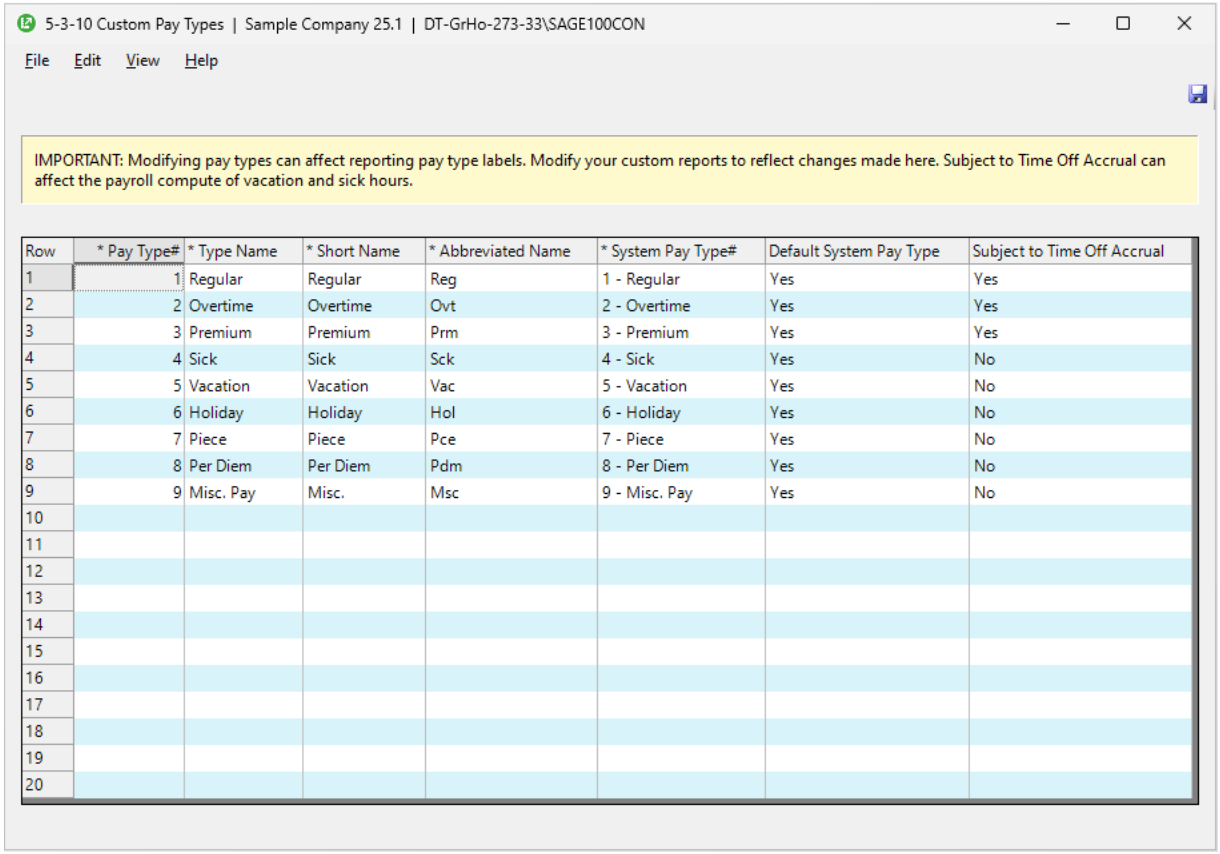
Use the new **5-3-10 Custom Pay Types** window to create the set of pay types that your company needs. Sage 100 Contractor comes with 9 basic pay types. You do not need to change these predefined pay types if they serve your company's needs. However, you can edit any existing pay types, delete pay types that are not in use, and add any others that you need.

When you enter payroll records, your custom pay types will be available. Any pay types that you delete will not be available.

> **Example:** Say your company has a paid-time-off policy (PTO), rather than separate sick and vacation time. You can delete the predefined Sick and Vacation pay types, and add a PTO pay type. Or, if your company offers time off for jury duty and bereavement paid out as regular time, you could add Bereavement and Jury Duty as new pay types.

You can have up to 99 custom pay types.

We've been listening to you!




You need to have Payroll Admin rights and Company Admin rights (or just Company Admin rights, if you have no designated payroll admin user) to add, edit, and delete pay types.

### About Default System Pay Types

System Pay Types determine how payroll transactions are classified on reports. Each pay type must be associated with one of the predefined system pay types, shown in the following table.

Computations for each system pay type

| System Pay Type# | Computes pay at |
|---|---|
| 1-Regular | Standard pay rate. |
| 2-Overtime | Standard overtime pay rate. |
| 3-Premium | Double-time pay rate (often for night shift, holidays, and so on) |
| 4-Sick | Standard pay rate for sick leave. |

| System Pay Type# | Computes pay at |
|---|---|
| | Decreases the accrued sick hours in the employee record. |
| 5-Vacation | Standard pay rate for vacation.<br>Decreases the accrued vacation hours in the employee record. |
| 6-Holiday | Standard pay rate for holidays.<br>Use type **6-Holiday** for employees who do not work on a holiday, but are paid for the day. |
| 7-Piece | Piece rate by the piece completed.<br>In the **Hours** cell, enter the number of hours worked.<br>In the **Piece Rate** cell, enter the rate for each piece completed.<br>In the **Pieces** cell, enter the number of pieces completed. |
| 8-Per Diem | Lump sum for traveling expenses, and so on<br>In the **Pay Rate** cell, enter the amount. |
| 9-Miscellaneous | Lump sum for bonuses, and so on<br>In the **Pay Rate** cell, enter the amount of the payment. |

**Note:** You cannot modify *system* pay types.

Initially, the predefined pay types that come with Sage 100 Contractor match the system pay types, but as you customize the list of pay types, you may name the pay types differently and you can associate pay types with different system pay types. You may find that you do not need all the system pay types, although the full set of 9 system pay types are always available to select.

For each system pay type that you retain, you need to designate 1 pay type (Pay Type#) as the Default System Pay Type. (You can designate only 1 pay type as the default for each system pay type that you retain.) For example, say you create 10-Jury Duty as a new pay type, assigning it the 1-Regular system pay type, and there is an existing pay type (say, 1-Basic) assigned to that system pay type. You can use only one of those pay types as the default 1-Regular ***system pay type***.

> **Note:** Before you can delete a pay type that is designated as a Default System Pay Type, you need to assign another pay type as the Default System Pay Type, unless it is the last pay type assigned to that system pay type.

### Accruing time off for the pay type

If employees will accrue time off when paid using a selected pay type, select *Yes* in the **Subject to Time Off Accrual** column. Both Sick and Vacation hours are accrued for timecard lines where the pay type (except for Per Diem and Msc pay types) is subject to time off accrual.

### New reports and form designs to support custom pay types

Custom pay types appear on pay stubs and on several payroll reports.

The details on the new **5-2-4-43 Payroll Direct Deposit Stub~with Timecard Details** report and the **Payroll Direct Deposit Multipage Stub** form design include the date, job, equipment code and cost code (if they exist), custom pay type name, system pay type abbreviation, pay rate (or piece rate), and hours or pieces.

Many other reports have been modified to accommodate custom pay types.

> **Important!** If you change the system pay type for any of the predefined pay types or add new custom pay types, you need to update your custom payroll reports and form designs. Otherwise, your custom reports and payroll computations may not be accurate.

### To add a new custom pay type:

1. Open the **5-3-10 Custom Pay Types** window.
2. In the last blank row on the grid:
   a. In the **Pay Type#** column, type the code for the pay type, and then press **Enter**.
   b. In the **Type Name** column, type the name to use for the pay type (for example, in payroll records, field reports, and job cost details) and then press **Enter**.

c. In the **Short Name** column, type the code for the pay type, and then press **Enter**.

   The short name is used in numerous system reports, such as Payroll Check Register, Union reports Employee Hour reports, and Daily Labor reports.

d. In the **Abbreviated Name** column, type a 3-letter abbreviation for the pay type, and then press **Enter**.

   The abbreviated name is used in system reports such as Timecard Journal reports, Daily Payroll reports, and Daily Labor reports.

e. In the **System Pay Type#** column, select the system pay type to use to classify pay transactions on reports, and then press **Enter**.

f. In the **Default System Pay Type** column, if this pay type should be the default for the selected system pay type, enter 'Y,' and then press **Enter**.

   If it is not the default, enter 'N,' and then press **Enter**.

g. If an employee will accrue sick and vacation time when paid using this pay type, enter 'Y' in the **Subject to Time Off Accrual** column.

h. Select **File** > **Save**.

**To edit an existing pay type:**

1. Open the **5-3-10 Custom Pay Types** window.
2. On the grid, in the row for the pay type that you want to change, make the changes you need.

   > **Note:** Make sure you do not assign more than one pay type as the Default System Pay Type.

3. Select **File** > **Save**.

**To delete a pay type:**

> **Note:** You cannot delete pay types that are used in any payroll records.

1. Open the **5-3-10 Custom Pay Types** window.
2. On the grid, select the row number for the pay type you want to delete.
3. Right-click the row and then select **Cut Row**.
4. Select **File** > **Save**.

# Other improvements

Version 25.2 also includes the following improvements:

## Sign into Sage 100 Contractor with a Microsoft Account

As a company administrator, you can again set up SQL logins using Windows Authentication for users to sign in to Sage 100 Contractor using their Microsoft Accounts email. (Users could not sign in using a Microsoft Account email in version 25.1.)

In versions earlier than version 25.1, you were able to log in with Windows Authentication using a Microsoft Accounts email. After upgrading from an earlier version, you may notice that you no longer get errors when performing certain functions (such as opening the 7-2-2 User List in Sage 100 Contractor or managing SQL logins in Database Administration).

## Use your Twilio account to send email notifications

Sage 100 Contractor can use your Twilio account to notify you or another administrator automatically when an automatic (unattended) nightly backup is not successful. It can also notify mobile app users when their time is rejected by a mobile reviewer.

You set up the connection with your Twilio account on a new **Twilio Email Settings** tab in Database Administration.

**After connecting your Twilio account in Database Administration:**

- Configure Twilio as the email service for each of your companies. You enter these settings in Sage 100 Contractor on the **Email and Fax Configuration** tab in the **7-1 Company Information** window.
- To send notifications if a nightly backup fails, you enter one or more email addresses in a new field on the Advanced Backup Settings tab under Advanced Settings in Database Administration.

> **Note:** Email notifications about rejected time are sent to the email addresses in **7-2-3 Mobile Users** records.

# Enhancements for the U.S. Edition

Sage 100 Contractor Version 25.2 includes the following enhancements specifically for the U.S. Edition:

## New help for setting up a Washington Cares calculation

Beginning in July 2023, employers in Washington state need to deduct and track premiums employees pay to the Washington Cares Fund. There is a new help topic with information and steps to help you set up the employee calculation. (Employers are not required to contribute to this fund.)

> **Important!** It is your responsibility to confirm default rate for calculating employees' contributions annually, and if it changes, to make adjustments accordingly.

For information about the legislation, see the Washington State Cares Fund web page at https://wacaresfund.wa.gov/toolkit#resources-for-employers.

**To set up the employee's deduction for the Cares premium:**

Open **5-3-1 Payroll Calculations**, and then:

- For the **Tax Type**, select **20 – Employee State Paid Leave**.
- For the **Default Rate**, enter the current rate.
- Leave the **Default Max** blank and the **Max Type** at **0 - None**.

> **Note:** The Washington Cares calculation has no wage maximum.

- For the **W-2** box, enter **14**.
- For the **W-2 Code**, enter **WAPFML**.

### Exempt employees

Even if an employee in Washington state is exempt from contributions to the Cares Fund, you still need to add this deduction to their **5-2-1 Employees** record. In the calculations grid, for the Washington Cares calculation, enter *No* in the **Active** column to signify the exemption.

## Updated help for Indiana first-time additional dependent

We updated the help for calculating Indiana tax withholdings to include changes in that state's exemption for first-time additional dependents.

# 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 25.2

## Fixes in Both Editions

Version 25.2 includes the following software fixes in both the U.S. and Canadian editions:

### General Ledger fixes

- In the account lookup window for **1-7 General Ledger Accounts**, you can hide and show the Account Name and other columns without the column name changing and without receiving an error.

### Accounts Payable fixes

- When you copy and paste many credit card transactions into the grid in the **4-7-7 Import Credit Card Transactions** window, the [**Include**] button works properly.

### Accounts Receivable fixes

- When you use **Next** as the default invoice number, the default number is always the next highest number in the system, including when you edit an existing invoice.
- Aging columns on **3-4 Statements** are now correct when your system date format contains '-' (dashes).
- If you import a progress bill that has cost codes, but no scheduled amounts, when you save the new progress bill, you receive a message telling you that the bill has no scheduled amounts. You can choose to save the progress bill or not. If you do not use the **Allow Editing Scheduled $** option, the message includes a note reminding you that you will not be able to enter scheduled amounts after saving the progress bill.

## Payroll fixes

- You can run two new **5-1-1 Employee List** reports that show four quarters and year-to-date amounts for the previous payroll year. These reports are:
    - 5-1-1-61 Employee List~Prior Year; with Earnings
    - 5-1-1-62 Employee List~Prior Year; with Earnings and Pay Rates
- When a mobile user rejects time an employee submitted through the Time app, the employee now receives an emailed notification that their time was rejected.
- Payroll advances appear properly on an employee's check stub when an advance used to correct a check is offset by a subsequent advance in the same quarter.

## Inventory fixes

- When you upgrade to version 25.2, Sage 100 Contractor updates any inventory allocations that had no posting period with a posting period that matches the period of the general ledger transaction.

## Project Management fixes

- In the **11-2 Work Orders/Invoices/Credits** window, when you use the **Copy or Repeat This Record** option to copy a paid invoice one time, Sage 100 Contractor creates a copy with an Open status .

## Miscellaneous fixes

- We fixed an issue that could occur if you drilled down to a record by triple-clicking (rather than double-clicking) a cell on the grid that happened to align with a field on the record you were drilling down to. The program no longer replaces the contents of the latter field with the contents of the first field on the form you were drilling down to.

# Fixes for the Canadian Edition

The following issue was fixed specifically for the Canadian edition:

- Drilling down from the **6-1-4-71 Job Income Statement** goes to a new **Contract Billed Detail** report, with totals derived from invoices' Total fields.
- In **5-2-1 Employee Records**, you can select a new **Dental Insurance** code for reporting employer-provided dental coverage on T4 and T4A slips.
- RBC Header values for Payroll direct deposit and Vendor EFT payments are formatted correctly in EFT files.

# Fixes for the U.S. Edition

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

- You no longer receive an error in the **4-2 Payable Invoices/Credits** and **4-7-3 Credit Card Receipts** windows when you post a record that includes use tax, your company uses GL Source Security, and you do not have access to the corresponding AP Invoice or CC Receipts sources.
- State withholding tax is calculated properly for non-residents in Maryland and employees in Anne Arundel county (Maryland) on payroll records with a 2-Bonus payroll type.

# 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 25.1

| Enhancement<br>(For details, see the v25.1 Release Notes) | U.S. Only | Canada Only | API |
|---|---|---|---|
| • Ability to create a Positive Pay file for protection against fraud | | | |
| • New Purchase Order# and Subcontract# fields to apply payments to a subcontract or a purchase order | | | |
| • New 4-7-7 Import Credit Card Transactions window | | | |
| • Ability to reconcile downloaded credit card transactions | | | |
| • Ability to edit posted credit card transactions | | | |

Summary of enhancements for version 24.3

| Enhancement<br>(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 | | | |
| • 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 | | |
| • 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<br>(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<br>(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 25.2.

## 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 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 25.2 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 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/.)

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**.