



Sage 100 Contractor 2023 (SQL)

Version 25.3 Release Notes

Canada and U.S. Editions

January 2024

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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 25.3.72 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 25.3.72 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 25.3.72, 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 25.3.72 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.

Using an older version of SQL Server?

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 – January 2024 (Build 25.3.98)

This update contains new tax tables for some U.S. states, and improvements and fixes for both U.S. and Canada editions.

U.S. Payroll Tax Tables

State and Other Government-Mandated Payroll Tax Changes

Payroll tax tables have changed for the following jurisdictions in this update:

- Illinois
- Maryland (state and county)
- Massachusetts
- North Dakota

Change to calculation of Colorado FAMLI Deduction

Starting January 1, 2024, wages subject to the Colorado FAMLI deduction are based on gross wages, rather than total taxable wages.

Note: After installing this update, you need to change the calculation method for Colorado FAMLI calculations in the 5-3-1 window from **2 - % Total Taxable Wages** to **1 - % Gross Pay (unadjusted)**.

For more information about this tax change, see [What to know about new FAMLI rules on wages and local governments](#) on the Colorado Department of Labor website.

Enhancements in this Update

Enhancements in both editions

This update includes the following enhancements to the U.S. and Canada editions of Sage 100 Contractor:

- We updated the following items on the Resources menu:
 - There is a new link to the Resource Center in the Sage Support submenu.
 - The Online Community link is now called Community Hub.
 - We removed the Sage 100 Contractor Home menu item.

Enhancements for the U.S. Edition

Sage 100 Contractor Version 25.3 includes the following enhancements specifically for the U.S. Edition:

Custom reports to help satisfy special state reporting requirements

The following reports are installed to a \Special Reports folder on your server when you install Database Administration.

To use the reports, a company administrator will have to copy the report files to one of the Custom Reports folders on the server.

- A **5-2-1-19 Illinois EPRC~for Excel** report to help meet the Equal Pay Registration Certificate reporting requirements for the State of Illinois.

For more information about this report, and how to access and use it, see Knowledgebase Solution ID [Illinois Equal Pay Registration Certificate \(EPRC\) report](#).

- A **5-1-8-19 Employee Hours~with AL Exempt OT** report to help you report the total aggregate amount of overtime paid and the total number employees who received

Fixes in this update

overtime pay for the State of Alabama.

For more information about this report, and how to access and use it, see Knowledgebase Solution ID [How to obtain a report for Alabama exempt overtime hours and wages](#).

Fixes in this update

Fixes in Both Editions

Version 25.3 includes the following software fix in both the U.S. and Canadian editions:

- If you did not also install Sage 100 Contractor when you installed Database Administration to your server, you can once again archive payroll without receiving an error saying "Unable to remove payroll data from the current company database."

Fixes for the U.S. Edition

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

- The **5-1-11 Certified Payroll** report for Washington now correctly shows premium hours and pay.
- We resolved a rare "divide by zero" error that could occur when final computing payroll that included a calculation with Tax Type 20, where the lowest record number of the calculations that used Tax Type 20 had no default rate and a dollar amount Max Type of 5 through 8.
- The federal withholding tax calculation now correctly accounts for the values in Boxes 4(a) and 4(b) on the W-4 Information tab in the **5-2-1 Employees** record.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

Fixes in this update

- When you run a payroll audit for the previous year, you no longer receive an error telling you that the Second CPP calculation is missing.
- When you run the **4-1-1-61 T5018 Report**, you no longer receive an error.

Update 1 – January 2024 (Build 25.3.84)

This update is for the Canada Edition only and contains an important payroll fix.

Payroll fix for the Canadian Edition

The CPP and QPP calculations now correctly deduct the \$3,500 annual exemption from subject wages.

U.S. Payroll Tax Tables–December 2023

Federal payroll tax changes

Federal payroll tax tables have been updated for 2024.

For details, visit the IRS website at <https://www.irs.gov>.

State and other government-mandated payroll tax changes

Payroll taxes changed for the following jurisdictions for 2024:

- Alabama (no withholding tax changes, but added support for overtime wage exemption)
- Arkansas
- California
- Colorado
- Connecticut
- Georgia
- Indiana
- Iowa
- Kentucky
- Maine
- Michigan
- Minnesota
- Mississippi
- Missouri
- Montana
- Nebraska
- New Mexico

- North Carolina
- Oklahoma
- Oregon
- Rhode Island
- South Carolina
- Vermont

Support for new Iowa State IA W-4

Iowa changed the IA W-4 form for 2024. Employees need to declare a total allowance amount (an annual dollar amount), replacing the previously used number of allowances.

For 2024, employers doing business in Iowa need to enter the annual dollar allowances from employees' new W-4 form in the **Annual Allow** column on the **Calculations** tab in the **5-2-1 Employees** records. Optionally, you can remove any value in the **Std Allow** column, which is no longer referenced.

If the employee doesn't submit a W-4, the total allowance is \$40 for 2024.

Note: If there is an amount in the **Add W/H** column, you need to enter an amount in the **Annual Allow** column to include the additional amount in the employee's Iowa state withholding. If there is no amount in this column, the additional withholding will be \$0.00.

Canadian Payroll Tax Tables—December 2023

This section highlights federal, provincial, and Quebec tax changes that go into effect January 1, 2024.

Federal payroll tax changes

Changes to Canadian payroll taxes for 2024 include:

- Updated income tax tables.
- Changes to EI rates and maximums.
- Changes to CPP rates and maximums.
- New Second CPP calculations. For more information, see "[Second CPP and QPP](#)" (page [16](#)).

For more information about these and other changes, visit [Canada Revenue Agency](#).

Quebec payroll tax changes

Changes to Quebec payroll taxes for 2024 include the following:

- The indexation rate used to calculate the value of personal tax credits, taxable income thresholds, and other amounts changed.

Important! To apply the indexation factor for the new year, you must update the Quebec Personal Tax Credits for Quebec employees on the **Options** menu in the **5-2-1 Employees** window.

Other provincial and territorial payroll tax changes

- The QPP maximum contribution amount and rate changed.
- The QPIP maximum insurable earnings changed.
- New Second QPP calculations. For more information, see ["Second CPP and QPP" \(page 16\)](#).
- For more information about these and other changes, visit [Canada Revenue Agency](#).

For more information about these and other Quebec payroll tax changes, visit [Retraite Quebec](#).

Other provincial and territorial payroll tax changes

The following provinces and territories mandated payroll tax changes, effective January 1, 2024:

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon

For detailed information on personal amounts, see the TD1 form for each province or territory.

Enhancements in Version 25.3

This section describes the new features and enhancements you will find in version 25.3.72.

Enhancements for the U.S. Edition

Sage 100 Contractor Version 25.3 includes the following enhancements specifically for the U.S. Edition:

New process for tax-exempt Alabama overtime

For 2024, Alabama introduced an exemption for overtime earned by hourly paid employees. (This exemption will expire on June 30, 2025, unless it is renewed by the Alabama legislature.) Overtime is work in excess of 40 hours per week. To qualify for the overtime exemption, both 40 hours of regular time and overtime hours must have been worked *in Alabama*.

Note: Tax-exempt overtime applies only to employees who are paid hourly, not salaried employees.

Sage 100 Contractor handles the calculation of this exemption, as follows.

During payroll computation, if the program identifies a payroll record that has an Alabama income tax withholding calculation, it creates two custom fields for the record:

- **Alabama Exempt Overtime Hours** (payr_u.alexhr)
- **Alabama Exempt Overtime Wages** (payr_u.alexwg)

Note: The field names, payr_u.alexhr and payr_u.alexwg, are reserved names for Alabama overtime. You cannot create them.

Sage 100 Contractor enters exempt overtime hours and wages in these fields during payroll calculation if all these conditions are true:

- The employee is an hourly paid employee.

The exemption is not calculated if there is any salary.

- The employee's pay period is weekly or biweekly.
- The employee worked 40 hours of regular time for the week *in Alabama*
- The employee worked overtime *in Alabama*

Sage 100 Contractor stores the amount of exempt overtime wages and passes it to Aatrix for printing on the Alabama quarterly form. In addition, the program stores the number of exempt hours to facilitate the review and audit of the wages.

Calculation of exempt overtime

To make the calculation, Sage 100 Contractor needs to determine the week to which to allocate the overtime. Also, 40 regular hours and the overtime hours must have been worked in Alabama.

If an hourly paid employee worked only in Alabama and worked more than 40 hours in an identifiable week, the calculation of exempt overtime is straightforward. All the time worked in excess of 40 hours is exempt, in this case.

However, if the employee worked in Alabama for only some of the 40 regular hours and worked in another state for the rest, even if they worked all the overtime in Alabama, determining the exemption becomes more complicated. The exemption applies only if the total hours worked in Alabama exceeds 40 hours. For example, an employee works 37 hours in Alabama and 3 hours in Georgia, and then works 5 hours of overtime in Alabama. In this case, only 2 hours of overtime is exempt because the employee worked only 42 hours in Alabama, in total.

If the employee is paid biweekly, enter each day (including the date) separately on the timecard, so that the program can determine the exempt overtime hours.


If the pay period is semi-monthly or monthly and the payroll record has wages for multiple states, you will need to enter the exempt overtime hours and overtime pay manually. (See the next section for instructions on editing this information.)

For more information about the overtime pay exemption, see [Overtime Pay Exemption Reporting Guidance and FAQs](#) on the Alabama Department of Revenue website.

Editing the Alabama Exempt Overtime Hours and Alabama Exempt Overtime Wages custom fields

If the program cannot calculate exempt overtime correctly, you may need to enter the amounts manually. Editing in these fields is restricted by default. To enter the correct amounts, you will need to clear the **Lock After Save** selection in the custom field properties.

To override the lock on a custom field:

1. In the **5-2-2 Payroll Records** window, select **Edit > Custom Fields**.
2. In the **Payroll Record Custom Fields** window, select **[Modify]**.
3. In the **Modify Payroll Record Custom Fields** window, beside the custom field you want to edit, select the **Edit properties for this field** () button.
4. Clear the **Lock After Save** check box.
5. Click **[Save]**.
6. Close the **Modify Payroll Record Custom Fields** window.

Tip: To keep the **Payroll Record Custom Fields** window open while you work in the payroll record, select **[Pin]**. (You can pin the window only if you do not display the 5-2-2 Payroll Records window in full screen.)

You can now change the values in the Alabama Exempt Overtime Hours and Alabama Exempt Overtime Wages custom fields.

Important! Change the values in these fields only after computing payroll. If you do a final compute after modifying these fields, Sage 100 Contractor will clear their values and substitute the calculated values, if any.

Calculating exempt overtime for 2023

There is a new **Calculate Alabama Overtime for 2023** option in the **5-2-2 Payroll Records** window. Although the overtime exemption doesn't take effect until 2024, you still need to report

overtime wages for 2023 for Alabama. Selecting this option will compute exempt overtime hours and wages for 2023 and enter this information in the new custom fields.

You can then print a special report that shows the exempt overtime hours and wages for 2023. Information about how to obtain this report will be available in Sage Knowledgebase.

Reporting Alabama exempt overtime hours and wages

Exempt overtime wages are passed to Aatrix for printing on the Alabama quarterly form.

You can include the **payr_u.alexhr** and **payr_u.alexwg** custom fields in queries and on custom reports.

Nebraska minimum tax calculation

Beginning in 2023, Nebraska employers with more than 24 employees must withhold at least 1.5% of each employee's taxable wages. To meet the minimum income tax withholding requirement as directed in the state's instructions, Sage 100 Contractor will adjust the income tax withholding to least 50% of the income tax withholding for a single employee with one income tax withholding allowance or for a married employee with two allowances if the computed tax amount is less than 1.5% of the gross pay on the payroll record.

Reduced minimum for employees who qualify

Employers with more than 24 employees can withhold less than this minimum tax if the employee provides documentation to justify a lesser amount, including:

- Verification of dependents
- Marital status
- The amount of itemized deductions

You can identify employees who qualify for the reduced amount when entering the deduction for Nebraska state tax in the **5-2-1 Employees** record. On the **Calculations** tab, on the row for the Nebraska income tax withholding calculation, enter a *1* in the **Table#** cell.

Note: If your company has fewer than 24 employees, your employees are exempt from the 1.5% minimum tax. In this case, enter a *1* in this cell for all employees.

Print Aatrix forms on plain paper

You can now print 1096 and 1099 forms on plain paper, rather than on preprinted forms.

Also, you cannot print the Federal 1096 copy on perforated.

Enhancements for the Canadian Edition

Sage 100 Contractor Version 25.3 includes the following enhancements specifically for the Canadian Edition.

Employer-provided dental coverage

In version 25.2, we added a new type of Employer Provided Dental Coverage field to the employee record.

If you provided access to dental care insurance or coverage of dental services to an employee for the 2023 tax year, indicate the level of access you provided by entering the appropriate code from the following list:

- 1 - No dental insurance or coverage of any kind
- 2 - Payee
- 3 - Payee, spouse and dependent children
- 4 - Payee and their spouse
- 5 - Payee and their dependent children.

Sage 100 Contractor version 25.3 will pass this field to Aatrix to print on T4 slips.

Second CPP and QPP

Beginning in 2024, Revenue Canada is instituting a new tier for CPP and QPP contributions that applies to pensionable employee earnings that are above the current wage ceiling and below a new, higher ceiling. Revenue Canada refers to these calculations as "second CPP" and "second QPP."

In Sage 100 Contractor, we've added new payroll tax types to accommodate employee contributions and employer portions of Second CPP or Second QPP. The following new tax types are available in the **5-3-1 Payroll Calculations** window:

- Employee Second CPP Contributions
- Employer Second CPP Contributions
- Employee Second QPP Contributions
- Employer Second QPP Contributions

For more information about these tax changes, visit [Canada Revenue Agency](#).

Second CPP (or QPP) ceiling

The maximum pensionable earnings under the first earnings ceiling is \$68,500. Employer and employee contributions are calculated at 5.95% of earnings up to this amount (less the basic exemption).

The maximum pensionable earnings for the second earnings ceiling is \$73,200. Employer and employee contributions on earnings between \$68,500 and this second ceiling are calculated at 4.0%.

Default amounts and rates are filled in automatically when you select a Second CPP tax type in the **5-3-1 Payroll Calculations** window.

Contributions are not permitted on pensionable earnings above \$73,200.

Updating employee records for Second CPP and Second QPP

You need to create new payroll calculations for the Second CPP and Second QPP (as applicable), and then update all employee records with these calculations.

Note: You need to have existing CPP calculations for employee and employer contributions before you can add calculations for Second CPP.

To add the Second CPP and Second QPP payroll calculations:

1. Open the **5-3-1 Payroll Calculations** window.
2. In the data control box, enter the number to identify the new calculation.

3. In the **Description** box, enter a brief description for the calculation, such as "Employee 2nd CPP."
4. In the **Tax Type** list, depending on whether you are setting up an employee or employer calculation for CPP or QPP, select one of the following tax types:
 - 20 - Employee Second CPP Contributions
 - 21 - Employer Second CPP Contributions
 - 22 - Employee Second QPP Contributions
 - 23 - Employer Second QPP Contributions

When you tab out of the field, Sage 100 Contractor automatically selects the corresponding Calculation Type, Calculation Method, Max Type, and several Subject To fields. It also inserts the Default Rate and Default Max from the current tax tables.

5. Specify the accounts that will be affected by this payroll calculation:
 - a. In the **Credit Account** box, enter the liability account number to credit.
 - b. In the **Credit Subaccount** box, enter the ledger subaccount number to credit.
6. From the **Options** menu, select **Update Employees > Update Default Rate and Maximum > ALL Employees**.

This command saves the new calculation and updates all employee records.

7. Repeat steps 2 through 6 to add other employer and employee CPP and QPP calculations, as needed.

Report changes

The amount of the employee's contributions for the second CPP or QPP will be reported separately in Box 16A (for CPP2) or Box 17A (for QPP2) on T4 slips.

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 25.3

Fixes in Both Editions

Version 25.3 includes the following software fixes in both the U.S. and Canadian editions:

Bank Feeds fixes

- We updated the browser used in Bank Feeds to meet the system requirements for several banks.

Payroll fixes

- In the **5-5-1 Daily Payroll** window, when you recap payroll by period and operated equipment, the Equipment column now correctly displays the equipment name with the number.
- You can drill down from hours on the **5-1-8-41 Job Hours** report and the **5-1-8-61 Paygroup Hours** report.

Also, the **5-1-8-41 Job Hours** report again shows employee detail lines for all paygroups, not just the totals for the paygroup.

- You no longer receive an error message when printing **5-2-4-31**, **-32**, **-36**, **-52**, and **-57** payroll checks if there are more than 40 calculations to be listed on the check stub.

Database Administration

- The correct help is available in Database Administration for the Advanced Twilio Email Settings tab.

Fixes for the Canadian Edition

- Database Administration continues to operate even if a drive with an invalid file format is connected to your computer.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

Accounts Payable fixes

- When you edit and then save a paid Accounts Payable invoice, Sage 100 Contractor correctly updates the invoice footer fields to prevent having a Paid status invoice with an outstanding Balance.

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.

Enhancement (For details, see the v25.2 Release Notes)	U.S. Only	Canada Only	API
<ul style="list-style-type: none"> In the 3-5 Jobs window, we added a new Certified Payroll tab that contains additional certified reporting fields. 	x		
<ul style="list-style-type: none"> In Accounts Payable, you can specify whether a line in a purchase order is subject to sales tax. 	x		
<ul style="list-style-type: none"> We added two new 1099 type (5 - Medical and 6 - Dividends) that will be passed to the Aatrix 1099 DIV form. The previous type 5 - No 1099 was adjusted to 7 - No 1099. 	x		
<ul style="list-style-type: none"> We added a totals row to the 4-1-1-61 Vendor 1099 Report. 	x		
<ul style="list-style-type: none"> We added a totals row to the 4-1-1-61 Vendor T5018 Report. 		x	
<ul style="list-style-type: none"> In Payroll, you can add, edit, and delete pay types using a new 5-3-10 Custom Pay Types window. 			
<ul style="list-style-type: none"> Several other improvements 			

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

Enhancement (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			

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 in earlier versions of Sage 100 Contractor (SQL)

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			
Enhancement (For details, see the v24.1 Release Notes)	U.S. Only	Canada Only	API
• Account distributions on direct deposit pay stubs			

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
• 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			

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

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			

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

Enhancement (For details, see the v23.2 Release Notes)	U.S. Only	Canada Only	API
• Ability to change jobs on computed payroll records			
• Better sorting on grids			

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 25.3.

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 25.3 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 231212212026787 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**.