Sage

Sage 100 Contractor 2024 (SQL)

Version 26.2 Release Notes

Canada and U.S. Editions

October 2024

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Installation Notes

Note for Canadian customers

> **Important!** Version 26.2 contains a change in the way Sage 100 Contractor passes the Federal ID number to Aatrix. As of November, 2024, you will need version 26.2 or a later version to print ROE, T5018, and T4 forms.

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 26.2 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 26.2 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 26.2, 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 26.2 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.

Enhancements in Version 26.2

This section describes the new features and enhancements you will find in version 26.2.

We've been listening to you!

Sage appreciates your product ideas! In version 26.2, 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 Payable

- For Vendor 1099 Forms, the owner's first and last names now appear in separate **First Name** and **Last Name** fields in the **Aatrix W-2/1099 Preparer** grid. Previously, the full name appeared in a single Full Name column in this grid.

  Thank you for this suggestion, Sherry K.

Payroll

- You can now undo a final payroll computation without having to void, copy, paste each record. For example, if you accidentally select Final Computation rather than Trial Computation when computing payroll, you can select a new [**Undo Final Computation**] button to undo the effects of the final computation, including:

  - Reverting the statuses of payroll records to 1-Open.

  - Deleting job cost and equipment cost records associated with the payroll records. (Some conditions apply if the job costs are used in a T&M billing.)

- Reverts QTD and YTD totals for the calculations in the employee records to the amounts before the final computation.

- Reverting quarterly and yearly earnings in the employee records to the amounts before the final computation.

- Reverting accrued sick and vacation hours in the employee records.

Thank you for this suggestion, Rachel B. and Eryn D.

- When searching on employee names in any Sage 100 Contractor window, if you sort the results in the employee lookup window on the **First Name** column, the search finds employees based on their first names. If you sort employees using any other column, the search finds employees by last name.

Previously, when you typed an employee name, or part of a name, in any Employee field, Sage 100 Contractor searched for matching first names. It would search for last names only if you selected the Find Employee by Last Name option in the **5-2-2 Payroll Records**, **5-5-1 Daily Payroll Entry**, and **5-6-2 Enter Time**. The new method is more flexible than the Find Employee by Last Name option, which we removed in version 26.2.

Thank you for your suggestions, Charlene D., Kezia R., Loren B., and Heather J.

- If you use Twilio as your email method for emailing direct deposit pay stubs, you can delay the delivery of emailed pay stubs until a future check date.

In the **5-2-4 Report Printing** window, select a direct deposit report and then select **Options** > **Direct Deposit Email Settings**. If Twilio is the email method for this process, a new option to delay the delivery of the email until the check date is available. If the option is not available, open the **Email Settings** window, set up Twilio as the email method, then return to the Direct Deposit Email Settings window, where you can select the option.

> **Important!** You can delay emailing only if the check date is within 72 hours of the printing date. If the check date is more than 72 hours in the future, the email process stops.

Thank you for this suggestion, Martel R.

Project Management

- We made several improvements to the **6-8-1 Cost to Complete** window, including:

  - New **Committed Contract**, **Purchase Orders**, and **Accrued Labor** columns in the grid.

  - New **Open**, **Review**, and **Dispute** options that control the types of change orders included in the Budget column.

  - A convenient new [**Create Change Order**] button and menu option to expedite your creation of change orders for over or under amounts, if there are any.

  Several report enhancements, including new reports, complement these changes.

For more information about these changes, see Cost to Complete enhancements, later in this document.

Thank you for these suggestions, Pam S., Kath A., and Shaun E.

Miscellaneous enhancements

- When you print checks, you can turn off the message that says the starting check number is defaulted from the selected checking account. You select the option to stop showing the message when the message appears.

Thank you for this suggestion, Rhiannon T. and Sherry D A.

- When you start a chat with Customer Support by selecting the Live Chat button in Sage 100 Contractor, the application places your customer account number in the Windows clipboard so that you can paste it into the Account Number field in the Chat window.

  Thank you for this suggestion, Charlene D.

Cost to Complete enhancements

Version 26.2 includes several enhancements designed to help you manage your projects even more efficiently, including:

- Making committed costs easier to project in the 6-8-1 Cost to Complete window.

- Providing a quick way to create change orders based on over/under amounts for a job.

The **6-8-1 Cost to Complete** window now includes separate **Committed Contract**, **Purchase Orders**, and **Accrued Labor** columns, with the sums of these columns displayed in the totals section below the grid.

Also new in version 26.2, you can select new options to include change orders with Open, Review, or Dispute status in the displayed budget for a selected job.

If any row in a Cost to Complete record includes an Over/(Under) amount, you can use the new [**Create Change Order**] button or menu item to open the **6-4-1 Change Order** window, conveniently starting a new change order for the selected job and phase. The Budget and Sub Change Details tab on the change order is prefilled with Over/(Under) amounts from the Cost To Complete record, along with their corresponding cost codes. When you save the change order, you can choose to update the Budget and Cost to Date amounts in the 6-8-1 Cost to Complete window and recalculate the record.

New and improved job reports include cost-to-complete enhancements

The new **6-8-1-26 Cost to Complete Report~Extended** report includes Committed Contract, Purchase Orders, and Accrued Labor columns that display the respective amounts from the 6-8-1 Cost to Complete record.

The **6-1-7-21 Over/(Under) Billings**, **6-1-7-31 Over/(Under) Billings~Extended**, and **6-1-8 Bonding** reports windows provide a new [**Include Cost to Complete adjustments in Budget**] option to include any Over/(Under) amounts in the report's Budget column.

> **Note:** These reports include only Approved change orders.

Other improvements

Version 26.2 also includes the following improvements:

Database Administration enhancements

- You can now restore all file and folder permissions for a single company using a new

  Restore permissions for the company's file system option available on the **Toolbox >**

  Company Tools tab. Similar to the option on the **Server Tools** tab, the new option does

  not affect permissions for any company besides the selected company.

Payroll enhancements

- Payroll check stubs can now display up to 28 characters for the paygroup description.

Email enhancements

- If you use Twilio as your email service in Sage 100 Contractor, sending a Bcc (blind copy)

  email to the sender is optional, although it is the default setting.

  With version 26.2, *if you do not want to include the sender in emails*, you need to clear the

  new **Include sender in Bcc** option on the **Email and Fax Configuration** tab in the **7-1**

  Company Information window.)

- We increased the number of characters allowed in email setup fields. Now, you can use

  up to 255 characters for the **Mail Server** field and 320 characters for the **Email Address**

  field.

Estimating Takeoffs

- When you export purchase orders from the **9-5 Takeoffs** window, items that have the same description but have no part number are no longer combined in the purchase order. Instead, the purchase order uses the alpha part number to discriminate between items, so they are listed separately on the purchase order.

Enhancements for the U.S. Edition

Sage 100 Contractor Version 26.2 includes the following enhancements specifically for the U.S. Edition:

Payroll

- To accommodate requirements for local taxes in Ohio, when creating a local tax calculation in the **5-3-1 Payroll Calculations** window, you can include or exclude elective deferral calculations (such as 401K) from wages subject to that tax using a new **Exclude Elective Deferrals from taxable earnings** option.

  For more information about setting up such a tax calculation, see the new help topic, Setting up Local Taxes for Ohio.

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 26.2

Fixes in Both Editions

Version 26.2 includes the following software fixes in both the U.S. and Canadian editions:

Accounts Payable

- In the **4-3-2 Pay Vendors** window, you can no longer select the ACH (EFT in Canada) or Voucher payment type to pay zero dollar ($0) payments.

Accounts Receivable

- Accounts Receivable and Service Receivables invoices allow taxable amounts as large as 999,999,999.00. Previously, these amounts were limited to 999,999.00.

Estimating

- In the **9-3 Assemblies** window, when you change the connection of a part in the first row to labor (changing the arrow to point to the right), the connection indicators change to the correct arrow for each part," rather than to "L" or "R for all the rows.

- In the **9-6 Import Parts Database** window, updating part prices and costs works properly when matching by alpha part numbers and the Alpha Part# field is set up as a required field in the **9-2 Parts** window.

General Ledger

- In several areas of the program, when you try to post to an inactive general ledger account or subaccount, Sage 100 Contractor now displays a message telling you that the account

is inactive and that you can't post to it.

- You can now delete a general ledger account that has been set up for positive pay without first having to remove the positive pay settings in the 1-11 Positive Pay window.

Miscellaneous

- When you save the **Send email using the company's default SMTP connection** option in an Email Settings window (say, for emailing customer statements), the setting no longer reverts to Microsoft Outlook when you reopen the window.

- When starting a new job, client, or vendors record, when you open and then close the data control lookup window without selecting a record, the program no longer displays an error and stops running if you then try to open the Contacts lookup window.

Payroll

- In the timecard details in 5-2-2-22, -26, -32, and -36 Payroll Record reports, the paygroup name no longer overlaps the comp code when the paygroup name is long.

  In the timecard details in the 5-2-2-42 Payroll Record report, the job/equipment name no longer overlaps the cost code when the job/equipment name is long.

- Holiday hours again print properly on the default Check11 report form.

- In the **5-6-3 Review Time** window, if you select the **Include Previously Reviewed Time** when you review mobile time entries, the Reviewed By user no longer changes to your name for previously reviewed entries (assuming you were not the original reviewer of the previously reviewed entries).

- When you run the **5-1-8-61 Paygroup Hours** report for a specific job or jobs, if you drill

down from an employee's hours you see details only for the hours included in the main report, rather than all the employee's hours associated with the paygroup.

Purchase Orders

• Sage 100 Contractor no longer displays an inaccurate warning that actual plus committed costs exceed the budget when a PO line with a negative quantity exists that reduces the actual plus committed cost to an amount within the accepted tolerance.

Project Management

• In the **6-11-1 Requests for Proposal** window, when you enter a request for proposal, Sage 100 Contractor fills in address fields from the job, even if no tax district is specified in the 3-5 Jobs record.

Review & Reporting

• When you print using a custom report form that has a logo that no longer exists in the specified location, Sage 100 Contractor attempts to find a logo and notifies you if a logo exists elsewhere. You can choose to replace the specified logo with the logo that the program found. (This can happen, for example, if you move Sage 100 Contractorfiles to a new server, but the report file points to the location on the old server.) Note that if the program has to search for a logo, the report runs more slowly.

• A custom report that used a combined **Number & Name** field could print the correct number but no name, or the name was incorrect. These combined Number & Name fields now print both the correct name and the number. (This was a rare circumstance, and we received only one report of this issue.)

Service Receivables

- When you delete a work order from the **11-3 Dispatch Board**, you can now scroll through the list of lines from the work order. This means that on work orders with more than 50 lines, you can see the [**Yes**], [**No**], and [**Help**] buttons at the bottom of the window, helping to ensure that you do not inadvertently delete the work order.

Fixes for the Canadian Edition

The following issue was fixed specifically for the Canadian edition:

- When you run reports in the **5-4-1 Federal Forms** window and the **4-5 Vendor T5018 Forms** window, you no longer receive an error stating that the Federal ID number is not valid.

Fixes for the U.S. Edition

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

Payroll fix

- The Illinois state certified report now shows double time hours when the payroll record includes hours and pay for the Premium pay type.

- In the **5-4-3 ACA Reports** window, if a user who is not a payroll admin runs ACA reports while payroll security is turned on, Sage 100 Contractor warns them that the report may be incomplete.

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 v25.3 Release Notes)	U.S. Only	Canada Only	API
• New items on the Resources menu			
• Custom reports to help satisfy special state reporting requirements	x		
• New process for tax-exempt Alabama overtime	x		
• Reduced minimum tax calculation for certain Nebraska employees	x		
• A new type of Employer Provided Dental Coverage field in employee records		x	
• New payroll tax types to accommodate Second CPP or Second QPPSecond CPP and QPP		x	

Enhancement (For details, see the v25.2 Release Notes)	U.S. Only	Canada Only	API
• In the 3-5 Jobs window, we added a new Certified Payroll tab	x		

Enhancement (For details, see the v25.2 Release Notes)	U.S. Only	Canada Only	API
that contains additional certified reporting fields.			
• In Accounts Payable, you can specify whether a line in a purchase order is subject to sales tax.	x		
• 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		
• We added a totals row to the 4-1-1-61 Vendor 1099 Report.	x		
• We added a totals row to the 4-1-1-61 Vendor T5018 Report.		x	
• In Payroll, you can add, edit, and delete pay types using a new 5-3-10 Custom Pay Types window.			
• Several other improvements			

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			

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			

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			

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 26.2.

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 26.2 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 240926192207720 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**.