Sage 100 2018

What's New

October 2017

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Contents

Global 1
- Spell Checking 1
- Updated Desktop 2
  - Option to Minimize the Desktop 2
  - Web Content 2
  - Navigation Buttons for Embedded Browser 2
- SAP Crystal Reports 2016 2
  - For Sage Fixed Assets Customers 2
- Service Notification Maintenance 3

Accounts Payable 3
- Form 1099 Tax Reporting 3

Accounts Receivable 3
- Fields Added to Pay Cycle Window 3

Business Insights Dashboard 3

Inventory Management 4
- Warehouse Status Field in Warehouse Code Maintenance 4
  - Inactive Warehouse Status 4
  - Display Inactive Warehouse in Lookup Views 4
  - Restricted Warehouse Status 4

Job Cost 5
- User Interface Enhancements 5
- Batch Entry 5
- History 5
- Utilities Menu 5
- Forms and Reports 5
  - Period, Year, and Job-to-Date Totals 6
- Period End Processing Reports 6

Mobility for Bar Code (Formerly Bar Code) 6
- Mobility Remote Setup for Scanco Mobile App 6
- Mobility for Bar Code Options (formerly Bar Code Options) 6
- EZ Import Tasks 6
- EZ Import Inquiry 7
- EZ Import Reject Maintenance 7
- EZ Import Reporting 7
- Other Renamed or Removed Tasks 7

Paperless Office 7

Payroll 8

TimeCard 8

Visual Integrator 8

Module Options for Managing Job Access 8

Job Cost and Payroll Import and Export Jobs 9

Renamed and Replaced Tasks 9

Accounts Payable 9

Mobility (Formerly Bar Code) 9

Retired Features 9

What's New in Version 2018

This document describes the enhancements added in Sage 100 2018. Global changes are listed first, followed by module-specific changes, and then retired features.

Global

The following changes are carried throughout multiple modules.

Spell Checking

An in-line spell checker has been added. Misspelled words are underlined, and you can right-click them to open a menu with the following options:

- Select a replacement for the misspelled word
- Add the word to your personal dictionary so that it will no longer be shown as misspelled. This does not affect other users.
- Ignore all instances of the misspelled word. The word will not be shown as misspelled as long as the current session of the task remains open.

The spell check feature has been added in the following locations:

- Memos
- Messages that print on forms, such as invoices, statements, and checks
- Paperless Office Electronic Delivery windows
- Comments
- Notes in Customer Contact Maintenance and Vendor Contact Maintenance
- E-mail Notification Maintenance (accessed from eBusiness Manager)
- Test E-Mail and Test Fax subject fields (accessed from Company Maintenance)
- Broadcast Message (accessed from Master Console)

When adding a multi-line user-defined field (UDF) to a screen, you can select whether to enable spell check.

Updated Desktop

The following changes have been made to the Sage 100 Desktop.

Option to Minimize the Desktop

A Toolbar Mode button has been added to the top-right corner of the Desktop. Click this button to minimize the Desktop. You will then see only the tab labels for the ribbon and the status bar. When you click a tab label, the full ribbon is displayed until you make a selection.

When the Desktop is minimized, you can click the Expand the Ribbon button next to the Toolbar Mode button to keep the full ribbon in view even after making a selection.

If you start an application, such as Sage Payment Center, that runs in the embedded browser, the Desktop will be automatically expanded.

Web Content

- A Web Content tab has been added to the ribbon.
- An Open in New Window check box has been added to the Link window that appears when you add a new link or edit an existing one. If you select this check box, the web page will open in your default browser instead of the browser embedded in the Desktop.

Navigation Buttons for Embedded Browser

Forward and Back navigation buttons have been added for the embedded browser.

SAP Crystal Reports 2016

SAP Crystal Reports 2016 for Sage (version 2016SP04) now ships with Sage 100. The following new features are included in this version:

- Conditional formatting of boxes and lines, including the ability to conditionally suppress
- Vertical text alignment at Top, Middle, or Bottom
- A GetValueDescriptions function to display parameter value descriptions in your report layout
- Direct data access for SQL Server 2014

Important: You **must** uninstall earlier versions of SAP Crystal Reports before installing SAP Crystal Reports 2016 for Sage.

For Sage Fixed Assets Customers

If you have Sage Fixed Assets installed on the same computer as Sage 100 2018, you may receive an error when trying to preview reports in Sage Fixed Assets. The error occurs because the two programs use a different version of the SAP Crystal Reports runtime engine.

An upcoming release of Sage Fixed Assets will resolve this issue. For information on how to resolve the issue in your current version of Sage Fixed Assets, see article ID 86606 in the Sage Knowledgebase: https://support.na.sage.com/selfservice/viewdocument.do?externalID=86606

Service Notification Maintenance

A new task, Service Notification Maintenance, has been added to the following locations:

- Library Master Main menu.
- Payroll Setup menu

Use this task to manage who will receive e-mails related to Sage services. E-mails are sent to let you know about scheduled maintenance, unplanned outages, or other events that affect your ability to use the service.

Currently the only service available is the Payroll Tax Calculation Engine, but additional services may be added in the future. Until you designate at least one person to receive service notifications, a message appears each time anyone accesses the Payroll module alerting them that a user must be set up in Service Notification Maintenance.

Accounts Payable

The following changes have been made in the Accounts Payable module.

Form 1099 Tax Reporting

The 1099 eFiling and Reporting task has been renamed Form 1099 Tax Reporting. Also, the Minimum YTD Payment field has been replaced with a Minimum YTD button. Click this button to open the Minimum YTD Payment window and enter the minimum payments for the corresponding Form 1099 boxes.

Accounts Receivable

The following changes have been made in the Accounts Receivable module.

Fields Added to Pay Cycle Window

As part of the enhancements to the Payroll module, the following fields have been added to the Pay Cycle window that appears when updating the Commission Edit Register:

- Period Starting Date
- Check Date

Business Insights Dashboard

To protect sensitive employee information, the Workforce Statistics option has been removed from Business insights Dashboard.

Inventory Management

The following changes have been made in Inventory Management.

Warehouse Status Field in Warehouse Code Maintenance

A Status field has been added to Warehouse Code Maintenance. The three status options are Active, Inactive, and Restricted.

Inactive Warehouse Status

The Inactive status is intended for warehouses that are no longer in use. If a warehouse status is Inactive, you cannot select the warehouse in any data entry tasks.

A warehouse cannot be set to inactive if there is a record of inventory in the warehouse or if the warehouse is used in data entry or maintenance records, such as an open sales order or a ship-to address. If you try to change a warehouse status to inactive while the warehouse is in use, a message appears letting you know that the warehouse cannot be set to inactive. You can click the Details button in the message windows to see a list of records in which the warehouse is used.

Display Inactive Warehouse in Lookup Views

A new check box, Display Inactive Warehouses in ALE Lookups, has been added to the Preferences tab in Company Maintenance. The check box is selected by default. Clear the check box if you don’t want to display inactive warehouses in lookup views.

Restricted Warehouse Status

The Restricted status is intended for a warehouse that is still in use but activity needs to be temporarily suspended, for example, to take inventory. If a warehouse status is Restricted, it cannot be selected in data entry tasks unless an exception is created in the new Allow Entry of Restricted Warehouse window.

To create exceptions, click the Allow Inactive Warehouse button, which is next to the Warehouse Status field and available when Restricted is the selected status. You can then select data entry tasks, and the restricted warehouse can be used in those tasks.

You can enter dates in the Restricted Start Date and End Date fields to automatically start and end a period in which the warehouse is restricted.

A permanent code, RESWH (Restricted Warehouse), has been added to S/O Cancel and Reason Code Maintenance.

Job Cost

The Job Cost module has been rearchitected to improve performance and usability.

User Interface Enhancements

These changes have been incorporated to make it easier to access data and complete tasks.

- Data entry grids are used to improve efficiency.
- Selection grids are available on most report task windows and elsewhere.
- Calculator buttons have been added to dollar amount fields.
- Calendar buttons have been added to date fields.
- Hyperlinks to related tasks have been added where applicable.

Batch Entry

Batch entry can be used in the following tasks:

- Job Posting Entry
- Job Billing Entry
- Field Report Entry

You can enable batch entry for each of these tasks and set the next batch number on the Entry tab in Job Cost Options.

History

On the History tab in Job Cost Options, you can select whether to retain history and set the number of years to retain history. The minimum is two years.

Utilities Menu

The utilities used to control the archiving, restoring and purging of Job Cost history have been updated for the new number of years option, and are now available on the Utilities menu.

The Summarize Cost Detail utility has been moved to the Utilities menu.

Forms and Reports

- Report setting options now appear on the header area of the applicable report window. You can avoid reentering selections each time you print a report by creating a new report setting. For more information, see *Create a Report Setting* in the help.
- SAP Crystal Reports is now used for all reports and forms. Non-graphical forms are no longer available.
- Selection grids have been added so that it’s easier to filter report data.

- The option to keep the task window open after printing or previewing a report has been added to report task windows.
- If you use Job Cost for billing, the invoice form will need to be reformatted.

Period, Year, and Job-to-Date Totals

The Job and Job Cost Code Detail tables no longer contain period-to-date, year-to-date, and job-to-date totals. If you have custom reports that contain this information, you must create a sub-report to summarize the data from the Job Cost Code History table to calculate the totals.

Period End Processing Reports

A Print Period End Reports check box has been added to the J/C Period End Processing window. If you select this check box, the J/C Period End Reports window opens when you click Proceed. The reports selected in Period End Report Selection are listed, and you can select which ones that you want to print. If no reports are selected in Period End Report Selection, the check box is not available.

Mobility for Bar Code (Formerly Bar Code)

The Bar Code module has been renamed; it is now the Mobility for Bar Code module. This section provides an overview of the changes. For more details on how the new features work, see the help.

Mobility Remote Setup for Scanco Mobile App

The Mobility Module Setup task has been added as part of the setup process for Scanco's mobile app for Apple iOS and Android devices.

Mobility for Bar Code Options (formerly Bar Code Options)

The Bar Code Options task has been renamed Mobility Options and offers a simple configuration for number of days to retain import history. Also the File tab has been removed.

EZ Import Tasks

The following four tasks have been added to import data collected on mobile devices.

- Inventory EZ Import for Physical Count Entry, Count Card Entry, receipts, issues, adjustments, alias entry, and job issues. This task replaces Import Inventory Transactions.
- Sales Order EZ Import for Invoice Data Entry and Shipping Data Entry. This task replaces Import Sales Order Transactions.
- Purchase Order EZ Import for Receipt of Goods. This task replaces Import Purchase Order Transactions.
- Bill of Materials EZ Import for Production Entry. This task replaces Import Bill of Materials Transactions.

- EZ Import can be used to import any transaction type.

You can use EZ Import exclusively; or you can use the module-specific import tasks listed above, in conjunction with Role Maintenance, to manage which types of transactions that users are able to import.

The new tasks show all data imported by type. For example, data for Physical Count and Issues is shown separately.

EZ Import Inquiry

Use the new EZ Import Inquiry task to view and print all imported data within a specified date range.

EZ Import Reject Maintenance

The new EZ Import Reject Maintenance task displays detailed information in a grid view which you can use to make corrections as needed. This task replaces Rejected Import Maintenance.

EZ Import Reporting

The following reports show all data collected on mobile devices:

- EZ Import Report for all records currently in process.
- EZ Import History Report for all records that have been processed.
- EZ Import Rejection Report for all records that have been rejected due to discrepancies

Other Renamed or Removed Tasks

The following tasks have been renamed or replaced.

- Purge Bar Code History has been renamed Purge EZ Import History.
- The Unattended Bar Code Transaction Import task has been removed from the Main menu. Use the EZ Import tasks instead.

Paperless Office

The following changes have been made as part of the redesign of the Payroll module.

- You can now create and email employee payroll checks in PDF format. In Forms Maintenance, a check option has been added to the Documents list for the Payroll module.
- The Employee Viewer task has been added to the Main menu. The Form Type field has Check and Direct Deposit Stub options.
- In Employee Self Service, the View Documents button has replaced the View Stubs button. The button opens the Employee Viewer window in which you can view both checks and direct deposit stubs.

Payroll

The Payroll module has been redesigned to improve performance and usability. For details, see the Payroll What's New guide available here: https://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/payroll_upgrade.pdf

TimeCard

As a result of the extensive improvements to the Payroll module, **the TimeCard module is not currently compatible with Payroll**. However, a compatible version of TimeCard will be released in a product update during the first half of 2018.

If you currently use the TimeCard module and plan to use the updated version when it's released, two options are available:

- Postpone upgrading to Sage 100 2018 until the updated TimeCard module is available.
- If you upgrade to Sage 100 2018 before the updated module is available:
  - Create a backup of your TimeCard data so that you can use Visual Integrator to import it when the updated module is available.
  - Uninstall the TimeCard module from your current Sage 100 installation before running the Parallel Migration Wizard in Sage 100 2018.

Visual Integrator

The following changes apply to the Visual Integrator module.

Module Options for Managing Job Access

You can now control whether users can create and run import and export jobs on a module-by-module basis. Module options to manage job access have been added to Role Maintenance for the following modules:

- Accounts Payable
- Accounts Receivable
- Bar Code
- Bill of Materials
- Bank Reconciliation
- Common Information
- Customer Relationship Management
- eBusiness Manager
- Fixed Assets
- General Ledger
- Inventory Management
- Library Master

- Purchase Order
- Payroll
- Return Merchandise Authorization
- Sales Order

Job Cost and Payroll Import and Export Jobs

All import and export jobs for the Job Cost and Payroll modules must be recreated.

Renamed and Replaced Tasks

This section lists tasks that have been renamed or replaced with another task.

Accounts Payable

Form 1099 eFiling and Reporting has been renamed From 1099 Tax Reporting.

Mobility (Formerly Bar Code)

- Inventory EZ Import replaces Import Inventory Transactions.
- Sales Order EZ Import replaces Import Sales Order Transactions.
- Purchase Order EZ Import replaces Import Purchase Order Transactions.
- Bill of Materials EZ Import replaces Import Bill of Materials Transactions.
- Purge Bar Code History has been renamed Purge EZ Import History.
- The Unattended Bar Code Transaction Import task has been removed from the Main menu. Use the EZ Import tasks instead.

Retired Features

The integration between the General Ledger module and the BenefitMall payroll service is no longer supported. Sage Payroll Services is now the only supported payroll service. Based on your implementation, it is possible that the integration for the BenefitMall payroll service may continue to function. However Sage has discontinued our ongoing development efforts.