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Sage 100 2019

What's New

June 2019

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Chapter 1

Introduction

This document describes the enhancements included in Sage 100 2019 and subsequent updates for that version.

The latest update incorporates everything that was added in the previous version 2019 updates. In other words, you only need to install the latest update to get the features described for all updates.

Depending on your purchase agreement, some features described here may not be available in your product.

Chapter 2

What's New in Version 2019.1

This chapter describes the enhancements added in Sage 100 2019.1. Global changes are listed first, followed by module-specific changes.

Depending on your purchase agreement, some features described here may not be available in your product.

Global

The following changes are carried throughout multiple modules.

View Paperless Documents from Journal Drill Down Window

A Paperless Viewer button has been added to the Journal Drill Down window. If you've set up Paperless Office and have the appropriate security setup, you can click the button to open the Journal and Register Viewer. The button is available when you access the Journal Drill Down window from the following tasks:

- A/P Invoice History Inquiry
- A/P Payment History Inquiry
- A/R Invoice History Inquiry
- G/L Account Maintenance/Inquiry
- G/L Source Journal Maintenance
- I/M Item Maintenance/Inquiry
- P/O Receipt History Inquiry

Links to Sage University Training

A Sage University button (with a graduation cap icon) has been added to more task windows. You can click the button to view a list of training videos related to the task. Depending on your Business Care plan, there may be no charge to watch the videos.

Sales Order

The following changes were made in the Sales Order module.

Add Tracking Number to Email Messages

In Electronic Delivery Message Maintenance, when you're creating a message for a Sales Order invoice, you can add the tracking number to the subject or the body of the message. To add the tracking number, insert the new TrackingNo merge field.

If you add the tracking number to the subject, they are displayed in plain text and multiple tracking numbers are separated by commas. In the body of the message, the tracking numbers are links that the recipient can click to track the shipment.

Chapter 3

What's New in Version 2019

This chapter describes the enhancements added in Sage 100 2019. Global changes are listed first, followed by module-specific changes, and then retired features.

Depending on your purchase agreement, some features described here may not be available in your product.

Global

The following changes are carried throughout multiple modules.

Auto-Complete for Account Numbers

The auto-complete feature has been added for general ledger account number fields. You can now search for an account by entering any of the following in an account number field:

- Account number
- Main account
- Account description
- Account group

As you type, a list of accounts matching your entry appears, and you can select one from the list.

This feature is automatically enabled for all users. You can disable the feature for individual users in Library Master > User Maintenance.

To enable this feature, run the Build Search Index utility on the Library Master Utilities menu to create an index. As you add accounts, you'll need to run the utility again to index the new records.

Print Status Updated When Using Keep Open Check Boxes

In the tasks listed below, when you print a document while the Keep Window Open After Print or Keep Window Open After Preview check box is selected, the document's print status will reflect that the document has been printed. Previously the document's print status would have been set to not printed.

- Invoice Printing (Job Cost)
- Purchase Order Printing
- Return Order Printing
- Sales Order Printing
- Picking Sheet Printing

- Shipping Label Printing
- Invoice Printing (Sales Order)

Security Update for E-mail Delivery

Transport Layer Security (TLS) 1.2 is now supported when sending e-mails through Paperless Office and eBusiness Manager.

Message Enhancements

Some message windows now have a More Info link. When you click this link, you will see another message with additional information or a related help article.

When you're opening a task and a message appears indicating that a file is locked, you can click More Info to see who has the file locked and in which task.

Copy Feature for Custom Lookup Views

A Copy button has been added to the User Lookup Wizard. You can now copy a custom lookup for other companies and users. Also, selecting companies and users is now easier—check boxes have been added to the company and user list.

Links to Sage University

A Sage University button (with a graduation cap icon) has been added to additional task windows.

You can click the button to view a list of training videos related to the task. Depending on your Business Care plan, there may be no charge to watch the videos.

The Sage University button has been added to the tasks windows listed below.

- Accounts Payable
  - ACH Maintenance
  - Expense Distribution Table Maintenance
  - Invoice Payment Selection
  - Repetitive Invoice Selection
  - Vendor Maintenance

- Accounts Receivable
  - Cash Receipts Entry
  - Commission Edit Maintenance
  - Customer Maintenance
  - Invoice Printing
  - Repetitive Invoice Entry
  - Repetitive Invoice Selection
  - Salesperson Maintenance

- Bank Reconciliation
  - Auto Check Reconciliation
  - Bank Code Maintenance
  - Check, Deposit and Adjustment Entry
  - Positive Pay Export

- General Ledger
  - Transaction Journal Entry

- Job Cost
  - Contractor Maintenance
  - Job Maintenance

- Library Master
  - Activity Log

Payroll Module Removed from Installation Program

The Payroll module is no longer part of the Sage 100 installation program. To install the module, use the standalone installation program. For information on installing the Payroll module, see the Sage 100 Payroll Installation and Upgrade Guide. The guide is available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Custom Office

You can now customize the columns and buttons on the following Paperless Office viewers:

- Journal and Register Viewer
- Period End Report Viewer
- Report Viewer

General Ledger

The following changes were made in the General Ledger module.

Consolidate Journal Entries in General Journal PDF

When printing the General Journal and selecting PDF output, you can now consolidate all General Journal entries into one PDF. A module option, Print Multiple PDFs for General Journal, has been added in Role Maintenance. Clear the check box for this option to consolidate the entries.

Account Appears on All Pages of Detail Reports

The account number and description are now printed on each page of the General Ledger Detail Report and General Ledger Detail by Source Report.

Encrypted Bank Information

Bank descriptions and account numbers are now encrypted. Bank descriptions are still visible in windows and on reports and forms.

A new security event, "Allow Viewing, Printing and Editing of Highly Sensitive Personally Identifiable Information," determines whether users will be able to view and print bank account numbers.

For more information, see *Additional Security for Bank Information* in the help.

Inventory Management

The following changes were made in the Inventory Management module.

Option to Include Inactive Items in Physical Count

An Include Inactive Items check box has been added to the Physical Count Worksheet task window. If you select this check box, inactive items are printed on the worksheet and included in Physical Count Entry and on the Variance Register. If the check box is cleared, inactive items are excluded from the physical count process.

Option to Print Variances Only

An Only Print Variances on Register check box has been added to the Physical Count Variance Register task window. If you select this check box, all items for which there is no variance are omitted from the register.

Item Quantity Inquiry Button in Physical Count Entry

An Item Quantity Inquiry button has been added to the Lines tab in Physical Count Entry. Click this button to view quantity information for the selected item.

You can click the arrow next to this button and select Item Inquiry to open the Item Inquiry window, or select Item Memo to view, create, or maintain memos for the selected item.

Note: To see the Item Memo option, it must be enabled in Memo Manager Maintenance:

1   Select Inventory Management > Setup > Memo Manager Maintenance.

2   In the Memo Type field, select Item.

3   Select a role.

4   To add Physical Count Entry to the Task list, click the Reset All to Defaults button.

5   For Physical County Entry, in the Memo option column, select Show or Maintain.

Library Master

The following changes were made in the Library Master module.

Data File Display and Maintenance

Data File Display and Maintenance has been upgraded with several new features.

- If you're using Sage 100 Premium, you can now access files stored in a SQL database.

- To select a file in the File Name field, you can enter the company code, followed by a colon, followed by the file name. For example: ABC:AR_Customer

- For files in modules upgraded to Business Framework, the Data File Display and Maintenance – Edit window now lists all fields and values in a grid.

  Encrypted fields are not available to edit, but you can select the Allow Read-Only Fields to Be Changed check box to edit the read-only fields.

  Validation is now performed on date and numeric fields.

- For multi-segment keys, the key scan filter allows you to filter the records using one or more segments of the key. Enter the selected key column separators as needed to indicate which segments of the key your search criteria must match.

  For example, the key for customer records is ARDivisionNo:CustomerNo. To search for customer number 02-CAPRI, you can enter the following in the Key field:

  :CAPRI

  Alternately, you can select a different character to separate the segments of the key in the Key Column Separator field. If you select the tilde (~) character, you can then search by entering the following in the Key field:

  ~CAPRI

  Note that you don't need to enter the full value contained in the segment. Continuing with the above example above, you could also enter the following:

  ~CAP

  You can filter by multiple segments. For example, to view records in the GL_DailyPosting file from 2018 with AP as the source journal, enter the following in the Key field:

  2018:AP

- For modules that have been upgraded to Business Framework, you can click Add to add a record.

- If you adjust the width of the Data File Display and Maintenance – Key Scan window, and then close the window to run a second scan, the window reopens at the width that you used previously. The Key and Data columns are automatically adjusted to fill the width of the window.

- In the Data File Display and Maintenance – Key Scan window, when entering search criteria in the Search field, you can use a special character to define the scope of the search:

  o To search for text in any location within the current key, add an asterisk (*) at the beginning of your search text. For example: *14072

  o To search for text within the current key and the data record, add a percent symbol (%) at the beginning of your search text. For example: %14072

- The Print button has been removed.

When starting Data File Display and Maintenance using the Run Program window accessed on the File menu, you can now enter SY_FileDisplay_UI.

Activity Log

The following changes have been made to the Activity Log:

- Changes made in Role Maintenance and User Maintenance are now tracked. A new activity type, Security, has been added and is used to categorize these changes.

- You now have the option to track changes in Company Maintenance and System Configuration. For more information, see Activity Log Configuration Window on page 9.

- To improve performance, there is now a configurable limit on the number of records that display when you open the Activity Log window. If the number of records in the log file exceeds this threshold, the Activity Log / window automatically opens before any records are loaded. Use the Activity Log - Filter window to filter the records and then view them in the Activity Log window.

  To change the auto-load threshold, click the Configure button on the Activity Log window.

- A Cancel button is now available while the progress bar indicates that records are loading so that you can cancel the process if needed.

- A Refresh button has been added to the window. Click this button to reload the records, including any new ones created after you started the session.

- The newly added first column in the grid contains an asterisk (*) if a log file is available for the record.

- The Purge button now appears below the list of records. Also, a purge utility has been added to the Utilities menu. For more information, see Activity Log Purge Utility on page 9.

- When purged, records are either deleted or added to an archive file based on settings in the Activity Log Purge Configuration window, which is described on page 9.

- You can view purged records stored in an archive file by clicking the History button and, in the Select Archive Year window, selecting a year. Archived records from that year are then displayed in the Activity Log window.

Activity Log Configuration Window

The Activity Log Configuration Window, accessed by clicking the Configure button in the Activity Log window, allows you to set various options. You can use this window to:

- Control how many records are loaded by default, either by entering a value or setting a date range.

- Specify whether to track changes made in Company Maintenance and System Configuration.

- Specify how data is purged.

- Specify what information is recorded when errors occur in Sage 100.

For more information, refer to the on-screen help that appears at the bottom of the configuration window when you click one of the rows.

Activity Log Purge Utility

You can use the Activity Log Purge utility to purge records from the Activity Log file. To access the utility:

- Click the Purge button on the Activity Log window.

- Select the task on the Library Master Utilities menu.

When purged, records are either deleted or added to an archive file based on settings in the Activity Log Purge Configuration window, which is described in more detail in the next section. You can schedule automatic purges using Task Scheduler. Archive files are stored here: ..\MAS90\MAS_System\Archive

Activity Log Purge Configuration Window

Click the Activity Log Purge Configuration button to open the configuration window. Use this window to control how many records are loaded by default and specify how data is purged.

Note that the default setting for the Minimum Days to Keep field is 365; therefore, the Records to Purge list may be empty when you initially start the utility.

Activity Log Filter Window

The Activity Log Search window has been renamed Activity Log Filter. In addition, the following changes have been made:

- You can filter records by company code and module code.

- You can enter search text to filter records by the text in the Description column.

- File Display/Maintenance and Visual Integrator have been added as options to filter records.

Activity Log Report

The following changes were made to the Activity Log Report task window:

- An Archive Year field has been added to the Activity Log Report. If you have archived records, you can select a year in this field, and only the archived records from that year are included in the report.

  To include unarchived records on the report, select Current Activity in the Archive Year field.

- You can filter the report by module using the Module Code fields in the Selections grid.

User ID Field Expanded

The User ID field on the E-mail tab in Company Maintenance has been expanded to hold 254 characters.

Keep Window Open Check Box in Rebuild Key Files

A Keep Window Open check box has been added to the Rebuild Key Files window. If you select this check box, the window remains open after you rebuild files, but the company, module, and file selections are cleared.

Paperless Office

The following changes were made in the Paperless Office module.

Text Formatting Options for Messages

A new message editor has been added to Electronic Delivery Message Maintenance and to the Edit Message window accessed through the Customer, Employee, and Vendor Viewer windows. The editor features a tool bar with text formatting options, including the ability to:

- Change the text color, font, and size
- Use bold or italic text
- Create bulleted and numbered lists
- Insert links and images

Square Brackets Replace Angled Brackets for Merge Fields

Previously the merge fields were enclosed in angled brackets (< >). However, the new message editor is HTML based, and angled brackets are reserved for a specific purpose in HTML. Therefore, square brackets ([ ]) are now used to enclose the merge fields.

If you have existing messages that contain merge fields in your earlier version of Sage 100, the angled brackets will be replaced with square brackets when you convert your data. For example, <DocumentNo> will be converted to [DocumentNo].

If you have message fields that contain an angled bracket that is not being used to enclose a merged field, the bracket is not converted, and an entry is written to the Conversion Log.

Angled brackets used for merge fields in the Subject field are also converted, but the Subject field does not support formatted text; only plain text is allowed.

Be sure to test any messages that were saved in your prior version of Sage 100 after converting your data.

Size of Message Field Increased

The message field holds 8192 characters, increased from 4096. However, the special characters used in the HTML code count toward this limit.

New Merge Fields

Three new merge fields have been added in Electronic Delivery Message Maintenance:

- [CustomerPoNo] for sales orders and Accounts Receivable and Sales Order invoices
- [InvoiceDueDate] for invoices
- [ShipDate] for sales orders and Sales Order invoices

The merge fields are available depending on which module and document is selected.

Also a Copy Merge Field to Clipboard button has been added to the window. Click this button to copy the selected merge field to the Windows clipboard and then paste it in multiple locations.

Cc and Bcc Options for E-mail Address

You can now specify whether the e-mail addresses used when e-mailing documents are added to the To, Cc, or Bcc field when e-mails are sent.

In the locations listed below, a Recipient field has been added; use this field to select To, Cc, or Bcc.

- Paperless Office Delivery Options (accessed from Customer Maintenance and Vendor Maintenance)
- Electronic Delivery (accessed from the customer, employee, and vendor viewers)
- Paperless Office Selection (accessed from all reports supported by Paperless Office)

When converting data, To is automatically selected in the Recipient field for the existing e-mail addresses.

In the Paperless Office Delivery Options window accessed through Employee Maintenance, the E-Mail Address field has been relabeled as the To field, and Cc and Bcc fields have been added. When converting data, existing e-mail addresses are added to the To field.

E-mail addresses entered in the Cc and Bcc fields are included in the customer, employee, and vendor listings if the option to print Paperless Office delivery options is selected.

Additional Attachments When Emailing Forms

In the Electronic Delivery for Forms window, you can now select additional attachments to include when emailing forms. You can select multiple attachments, and there is no restriction on the file type.

PDF File Name Options

A PDF File Name field has been added in Form Maintenance. In this field, if you select Document No., the document number is used as the file name for the PDF that is attached to the email. The full description is still used for the PDF file that is stored in the PDF directory.

If you select Full Description, the file name will vary depending on the document type. The file naming convention for this option is the same that was used in earlier versions of Sage 100.

Option to Copy Salespeople When E-mailing Forms

A Paperless button has been added in Salesperson Maintenance. Click this button to open the Electronic Delivery Options window and specify whether the salesperson will receive a copy of orders, invoices, and statements when they are e-mailed to customers from data entry, inquiry, and history tasks.

Search by Posting Date in Journal and Register Viewer

A Posting Date column has been added to the list box in the Journal and Register Viewer. When you click the Search button, you can include a posting date or range of posting dates in the search criteria.

Updated Printer Driver

The Amyuni PDF Converter, the virtual printer driver used to create PDF documents, has been updated to version 6.0.1.1.

Purchase Order

The following changes were made in the Purchase Order module.

Change for Drop-Ship Purchase Orders

In Purchase Order Entry and Receipt of Invoice Entry, if Drop Ship is selected in the Order Type field, the Work Order field on the Lines tab is not available.

When copying from a purchase order in Purchase Order Entry, if Drop Ship is selected in the Order Type field for the new purchase order, no history or work order information is copied from the source document.

Data Conversion

When converting your data after upgrading to version 2019, work order fields for drop-ship inventory lines and the corresponding history detail lines are cleared in purchase order and receipt of invoice records. History detail records that do not have corresponding data entry records are not affected.

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