



Overview

Sage 100 has one major release of new software each year with quarterly updates. The quarterly updates can also include new feature enhancements. Competitive Strategies, Inc. has put together this summary of new features for each update. Underlined Items are those we believe to be the most beneficial. Underlined Items in Red are major changes that impact current processing procedures.

On-line Documentation

- To view the latest documentation on Sage 100 go to the link below.
- Installation and Upgrade Guides provide detailed listings of new features.
- Release Notes list out program fixes.
- User Guides provide information on setting up and using the modules.
- <http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm>

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Sage 100 Payroll

Payroll 2.20.3

- Quarterly Unemployment Report
 - Include wage information for either federal unemployment tax, state unemployment tax or both.
 - Shows gross wages, total wages subject to employer's unemployment tax, capped wages subject to employer's unemployment tax, weeks worked.

Payroll 2.20.2

- Covid-19 Updates
 - Emergency Leave Worksheet
 - Employee Retention Credit Worksheet
 - Quarterly Tax Report Updates
 - Federal and State Tax Reporting Updates
- Multiple fixes including social security tax on Group Term Life Earnings and ACA Large Employer Report.
- Added an Hours Recap to the Punch In/Out screen in Time Track.

Payroll 2.20.1

- Updates to the Payroll Tax Update Utility
 - A current status field has been added to say System Is Up To Date, Pending Changes or Waiting for Installation.
- Covid-19 Leave Payments
 - Fix PR6024T is required for paying emergency paid sick or emergency paid family medical leave.

Payroll 2.20.0

- Changes for Revised W-4 Form
 - New filing statuses are available such as HH1, HH2, MJ1, MJ2, NR1, NR2, S1, S2
 - Dependent Amount field
 - Other Income Amount field
 - Deductions Amount field



Payroll 2.19.4

- Alternate Wage Cap Check Box. Added to the Tax Rate tab in Company Tax Group Setup.
- EEO-1 Reporting.
 - Added Job Category Field in Employee Maintenance.
 - Updated options available in the Ethnicity/Race Options field in Employee Maintenance.
- Improved Employer's Expense Summary Report
- Day of Week Displayed in Time Track Entry
- Utility for Missing Tax Records. Identifies tax records missing after converting data.
- New Tables added to store data included in the Employer's Expense Summary.

Payroll 2.19.3

- Employer Contributions Print on Pay Stubs. Added a check box to print on checks and direct deposit stubs.
- Reverse Payroll Checks Outside of the Current Quarter. Use the new reverse check button. Much faster and easier to reverse a payroll check.
- Post Employer Contributions by Department.
- Standard Occupational Classification Code (SOC) has been added to the Taxes tab in Employee Maintenance.
- Pension Plan Audit Report. New report added for up to eight deduction codes.
- G/L Account Fields for Other Taxes. An additional tab has been added in Company Tax Group Setup so you can enter different general ledger accounts for each tax.
- No Wage Cap Check Box added to Tax Rates in Company Tax Group Setup.

Payroll 2.19.2

- Compatible with *Sage 100 version 2018 product update 6 or higher*
- Auto-complete for Employee Fields. As you type a list of records matching your entry appears.
- Local Withholding Tax with Other Taxes.
- Total Hours Added to Check History Report.
- Option to Print in Condensed Format for the Payroll Data Entry Audit Report and Check Register.
- Pay Stub Update for Direct Deposit. Check stubs show year-to-date deposit amount by bank account.
- Deleting Direct Deposit Bank Accounts. Can no longer delete for an employee with a YTD amount.
- Pension/Profit Sharing Field Renamed to Retirement Plan.
- Change to How Other Taxes are Displayed.
- Federal Unemployment Tax Rate Conversion.
- Links to Sage University using a Graduation Cap Icon.

Payroll 2.19.1

- Fixes to known issues.

Payroll 2.19.0

- Tax Rule Inquiry. See which earnings and deduction tax rules are subject to a given tax.
- Capped Wages Window displays a summary of wages earned up to the tax limits.
- Employee Tax Info Window. Added a Tax Info button to Payroll Data Entry.
- Tracking for Company Tax Groups.
- Pension Plan Audit Report added to the Payroll Reports menu.



Payroll 2.18.5

- Check and Direct Deposit Stub Sort Options. Sort by employee number, name, department and name.
- Salary Equalization Utility to adjust employee's pay amounts.
- Payroll Conversion Wizard Local Tax Options.
- Certified Payroll Reporting. Based on Job Cost version 2018.5 and higher.

Payroll 2.18.4

- Company Tax Group Setup. Round withholding tax amount to the nearest dollar.

Payroll 2.18.3

- Workers' Compensation Maintenance changes
 - Effective Date field added. Enter new rates in advance.
 - Employee-Paid Workers' Compensation

Payroll 2.18.2

- Employee Check Details Window. On the pay history tab in employee maintenance and inquiry, select a check and click the check details button to view the check details.
- Workers' Compensation Report Options.
- Module Option for Out-of-Quarter Check Date. Added checkbox in Role Maintenance to allow for out of quarter check dates.
- Filter Time Track Report by Earnings Code.

Payroll 2.18.1

- Time Track. New time entry module that replaces TimeCard.
 - Payroll Options. Used to enable Time Track.
 - Time Track Options. Used to configure Time Track.
 - Punch In Method Field
 - Shift Maintenance
 - Employee Time Track Settings
- Employee Maintenance and Inquiry added
 - Print Check History Report Button
 - Payroll History Memo Button
- Payroll Tax Update Report Purge Utility. Purge records from the Payroll Tax Update Report file.
- Payroll Status Check Utility. Find issues that will cause unexpected results.

Payroll 2.18.0

- Payroll. New Payroll module with grid entry, customizable crystal reports and cloud-based tax calcs.
 - Payroll Tax Updates. Tax updates are cloud based and maintained by Sage.
 - Payroll Tax Update Report. View the tax changes report.
 - Tax Calculation Override Options.
 - Apply Tax Profile Information Options.



Sage 100cloud

Sage 100 2020.1

- A/P Data Entry. Added a Net Balance Button.
- A/R Invoice History Inquiry. Added a Payments tab.
- A/R Open Invoices Payments Today Correction. ARWAR4 can be scheduled. Auto correction in data entry.
- Lot/Serial Traceability. Multiple options to trace item use by Lot and Serial Number.
 - Lot Serial Customer Recall Report
- Role & User Reports. Ability to exclude tasks and security options with no access.
- Visual Integrator Enhancements.
 - Customized Lookups
 - Company Color on Import/Export screens.
 - Log Detail can be filtered to show just errors or export just failed records.
 - Log Detail now has row numbers from source file.

Sage 100 2020.0

- Global
 - Expanded Name Fields. Expanded the following name fields to 50 characters. Customer name, customer contact name, vendor contact name, confirm to name, requested by name.
 - Expanded Fields for Address Information.
 - Expanded telephone, fax and extension fields.
 - Add a Type Field for phone numbers to select from Work, Cell, Home or Other.
 - International Address Support.
 - Moved the country field above the address line.
 - Address and Phone fields support international formats.
 - Default Country Code added to the Preferences tab in Company Maintenance.
 - ****Note**:** Visual Integrator Jobs that include address information must be modified to include the CountryCode column and it must be imported before the ZipCode column.
- Payroll Version
 - If you're using Sage 100 Payroll, ***you must upgrade to version 2.20.1*** or later. Earlier versions will encounter errors since they are not compatible with international addresses.
- Map Service Choices
 - Choose a map service to use when clicking a Map button next to the address field. Set the default map for each User in the preferences tab in User Maintenance.
- Workstation Synchronization
 - Administrative rights on the workstation is no longer needed to run the Workstation Synchronization program that automatically starts after Sage 100 updates are installed on the server.
- Customization Import
 - Use this utility to import custom settings from the classic Desktop such as a custom task menu. On each workstation go to File, Desktop Utilities, Customization Import.
- Accounts Payable
 - Reverse Check Run Utility
 - Use this utility to reverse an entire check run.
 - Retain Paid Invoices
 - Changed setting from Days to Retain Paid Invoices to Months to Retain Paid Invoices
 - Select whether to purge invoices during month end processing or year-end processing.
 - 1099-NEC Form Added
 - Used to report nonemployee compensation for tax year 2020.
- Accounts Receivable
 - eInvoicing for A/R Invoices
 - Send customers emails that include an invoice summary and a pay-now link for online payments.



- Customers can use the pay-now link to make online credit card and ACH payments.
 - Works with Paya Connect Desktop
 - Retain Paid Invoices
 - Changed setting from Days to Retain Paid Invoices to Months to Retain Paid Invoices
 - Select whether to purge invoices during month end processing or year-end processing.
- Custom Office
 - Improved Grid Customization. Drag and drop columns to rearrange them on screens with grid entry.
 - Apply Grid Customizations to a Group of Users.
 - Save UDF Changes in Pending Status.
 - Add a Mask to Data Entry Fields.
- Inventory Management
 - Expiration Dates for Lot and Serial Items
 - Added a Utility for Adding and Changing Expiration Dates.
 - Added new Lot Serial Expiration Status Report.
- Job Cost
 - Option for Expensing Work-In-Process Costs
 - Enter Actual % Complete in S/O Invoice Entry and Shipping Data Entry
 - eInvoicing for Job Cost Invoices.
- Library Master
 - Convert Crystal Reports. Run this routine to convert all custom reports and forms to the latest version.
 - Update Custom Office Panels to Current Level.
- Purchase Order
 - Apply Multiple Purchase Orders to an Invoice or Receipt
 - Receipt History Inquiry and A/P Invoice History Inquiry show "Multiple" in the PO number field if multiple POs were applied to the document.
- Sales Order
 - eInvoicing for S/O Invoices
 - Send customers emails that include an invoice summary and a pay-now link for online payments.
 - Customers can use the pay-now link to make online credit card and ACH payments.
 - Works with Paya Connect Desktop
- Classic Desktop/Launcher has been retired and is no longer available.
 - Only the new "Standard" desktop is available. This includes the ability by user to change screen size, colors and desktop themes.



Sage 100 2019.4

- Accounts Payable
 - Form 1099-NEC option added in Form 1099 Tax Reporting (Aatrix)

Sage 100 2019.3

- Accounts Payable
 - 1099-NEC Form Added
 - Used to report nonemployee compensation for tax year 2020.

Sage 100 2019.2

- Global
 - Automatic Update of the Daily Transaction Register. The Daily Transaction Register will be printed and updated automatically. Added as a security event in Role Maintenance.
 - Warning Message for Document Dates. Show a warning if the user tries to enter a date outside of the allowable dates set for entries. Added to the Preferences tab in Company Maintenance.
 - Links to Sage University Training via a Graduation Cap Icon
- Accounts Payable
 - Ability to Set Default Expense Distribution Table. Select a distribution table for each vendor.
- Job Cost
 - Department Access for Time Track Selection.
- Library Master
 - Filtering Options in Data File Display and Maintenance.
 - E-mail Reports Printed Using Task Scheduler.

Sage 100 2019.1

- Global
 - View Paperless Documents from Journal Drill Down Window.
 - Links to Sage University Training via a Graduation Cap Icon.
- Sales Order
 - Add Tracking Number to Email Messages. Add tracking number to the e-mail message for Sales Order invoices.

Sage 100 2019.0

- Global
 - Auto-Complete for GL Account Numbers.
 - Print Status Updated when using Keep Open Check Boxes.
 - Security Update for E-mail Delivery. TLS 1.2 is now supported.
 - Message Enhancements.
 - Copy Feature for Custom Lookup Views. Copy a custom lookup to other companies and users.
 - Links to Sage University Training via a Graduation Cap Icon.
 - Payroll Module Removed from the Install. Payroll is now a separate install.
- Custom Office
 - Customize the columns to view in Paperless Office.
- General Ledger
 - Consolidate Journal Entries in General Journal PDF.
 - GL Account Appears on all pages of the GL Detail Report
 - Encrypted Bank Information. Bank descriptions and accounts numbers are encrypted.
- Inventory Management
 - Option to Include Inactive Items in Physical Count
 - Option to Print Physical Count Variances Only
 - Item Quantity Inquiry Button in Physical Count Entry
- Library Master



- New features in Data File Display and Maintenance.
- Activity Log upgraded to track more changes. Purge utility added.
- User ID field on the e-mail tab in company maintenance increased to 254 characters.
- Paperless Office
 - New HTML text Formatting Options for Messages. Change fonts, add links and images.
 - Message field increased to 8192 characters.
 - Added merge fields for Customer PO Number, Invoice Due Date and Ship Date.
 - Added Cc and Bcc Options for E-mail Address
 - Select additional attachments to include when emailing forms.
 - Option to Copy Salespeople when E-mailing Forms.



Sage 100 2018.10

- Accounts Payable
 - Form 1099-NEC option added in Form 1099 Tax Reporting (Aatrix)

Sage 100 2018.9

- Accounts Payable
 - 1099-NEC Form Added to report nonemployee compensation for tax year 2020.

Sage 100 2018.8

- Program fixes.

Sage 100 2018.7

- Program fixes.

Sage 100 2018.6

- Program fixes.

Sage 100 2018.5

- Bank Reconciliation
 - Sage Bank Feeds. Import bank transactions to simplify the bank reconciliation process.
- Job Cost
 - Certified Payroll Reporting added to Sage Payroll 2.18.5
 - Job Contractor Maintenance added to Job Cost Setup menu.
 - A certified payroll check box added to Job Listing and Job History windows.
 - Cost Code Detail Window. Added to the More Button.

Sage 100 2018.4

- Global
 - Links to Sage University Training via a Graduation Cap Icon
 - Credit Card Processing with Paya (formerly Sage Exchange) and selected card readers.
- Sales Order
 - Consolidate Multiple Orders in Shipping Data Entry
 - View Multiple Sales Orders and Purchase Order Numbers when viewing an invoice for multiple sales orders.

Sage 100 2018.3

- Global Enhancements
 - Reset Default Reports button for Period End Report Selection
- Bill of Materials
 - Update Changes to Miscellaneous Charge Items. Use the new Sync Misc Charge Changes field to update bills with changes in Misc Item Maintenance.
- Custom Office
 - Calculator option for Numeric Fields
 - Ability to Exclude UDFs from Report Selection Grids
- Inventory Management
 - Open Item Images with Windows Photo Viewer. You can then email the image, copy it to the Windows clipboard, and adjust the zoom level.
- Purchase Order
 - Auto Generate from Sales Orders. Summarize multiple items by line check box.
- Sales Order
 - Apply Multiple Sales Orders to an Invoice in Invoice Data Entry.



Sage 100 2018.2

- Global
 - Sage Contact for Office 365. View Sage 100 customer information in Outlook. Requires an Office 365 Business Premium or Enterprise subscription plan and an Azure Active Directory subscription.
- Accounts Payable
 - Search Invoice History from Vendor Maintenance
- Time Track
 - New Time Track module that replaces Time Card.
- Sales Order
 - Reprint Sales Orders and Quotes from History
 - Exclude Orders Being Invoiced from Reports

Sage 100 2018.1

- Program Fixes

Sage 100 2018.0

- Global
 - Spell Checking. An in-line spell checker added to selected data entry functions.
 - Option to Minimize the Desktop.
 - Crystal Reports 2016. Earlier versions of Crystal Reports must be uninstalled. Conflicts with Sage Fixed Assets.
 - Service Notification Maintenance. Receive an e-mail related to Sage services such as Payroll Tax Calcs.
- Accounts Payable
 - Form 1099 Tax Reporting. Minimum YTD Payment field replaced with a Minimum YTD button.
- Inventory Management
 - Warehouse Status Field added in Warehouse Code Maintenance. Can set a warehouse status to Active, Inactive or Restricted.
 - Display Inactive Warehouses. A new checkbox added to Preferences tab in Company Maintenance to not show Inactive Warehouses in lookups.
- Job Cost
 - New Job Cost module with grid entry, crystal reports and batch entry.
 - Batch Entry for job posting, job billing and field report entry.
 - History option. Set the number of years to retain history in Job Cost Options.
 - Utilities Menu to control archiving, restoring and purging Job Cost history.
 - Forms and Reports updated.
 - Period, Year and Job-to-Date Totals saved by period and year.
- Mobility for Bar Code
 - New module that replaces the Bar Code module.
 - Remote Setup of Scanco Mobile Apps
 - EZ Import Tasks for Scanco Mobile Apps
- Paperless Office
 - Create and email employee payroll checks in PDF format.
- Payroll
 - New Payroll module with grid entry, crystal reports and cloud-based tax tables.
 - Payroll is a separate install and version which can be installed without upgrading the Sage 100 version.
- Visual Integrator
 - Control user access by module through Role Maintenance.