Sage 100 2020

What's New

September 2022

Contents

Contents

Changes in Sage 100 2020

This document describes the enhancements added in Sage 100 2020 and subsequent updates for that version. Global changes are listed first, followed by module-specific changes, any updates to Microsoft 365 integration, and then retired features.

For a list of program fixes, see the version 2020 release notes and the release notes for version 2020 updates.

What's New in Version 2020.6

The following change was made in update 6 for Sage 100 2020.

Library Master

The following change was made in the Library Master module.

OAuth Authentication for SMTP Mail Server

On the E-mail tab in Company Maintenance, you can now select between two email authentication methods to use when connecting to the SMTP server:

- Basic Email Authentication: This option works the same as earlier versions of Sage.

- Modern Email Authentication or Open Authorization (OAuth): This new option is an open standard authorization protocol used to grant access using access tokens instead of sharing a user name and password.

If you're going to use the OAuth method, you will need to obtain your OAuth client credentials from your authenticating application, such as those offered by Microsoft® and Google®. To learn more, visit oauth.net.

For instructions on setting up OAuth in Sage 100, see How to Configure Sage 100 OAuth Email Settings.

What's New in Version 2020.5

Update 5 for Sage 100 2020 contains program fixes. For more information, please see the [release notes](#).

What's New in Version 2020.4

The following changes were made in update 4 for version 2020.

Accounts Payable

The following changes were made in the Accounts Payable module.

Updates for 1099 Form Tax Reporting

The following options have been added to support Form 1099 printing for tax year 2021:

- For the 1099 MISC form:
  - Box 11: Fish Purchased for Resale
- For the 1099 DIV form:
  - Box 2e: Section 897 Ordinary Dividends
  - Box 2f: Section 897 Capital Gain

What's New in Version 2020.3

Update 3 for Sage 100 2020 contains program fixes. For more information, please see the release notes.

What's New in Version 2020.2

The following changes were made in update 2 for Sage 100 2020.

Global Changes

The following change was made in update 2.

Map Sage 100 Users to Sage ID Accounts

A User Merge Utility has been added to the Administrative Tools window to help you map user records created in the Sage Provisioning Portal to user records created in Sage 100.

Use this utility when you're migrating data from an on-premises version of Sage 100 to one in the Sage Partner Cloud. For more information, see User Merge Utility in the help.

Library Master

The following changes were made in the Library Master module.

Access Administrative Tools

You can now access the Administrative Tools window from the Library Master Main menu.

ACA PII Worktable Available in Report Manager

When adding a Payroll report using the Report Manager wizard, you have the option to include the ACA PII (personally identifiable information) worktable in the report.

Purchase Order

The following changes were made in the Purchase Order module.

Form 1099-NEC Option Available

You can select the 1099-Nonemployee Comp form when entering a document in the following tasks:

- Purchase Order Entry

- Receipt of Goods Entry

- Receipt of Invoice Entry

- Return of Goods Entry

What's New in Version 2020.1

The following changes were made in update 1 for Sage 100 2020.

Accounts Payable

The following changes were made in the Accounts Payable module.

Easily Add Distribution Balance to Current Line

A Net Balance button has been added in the following locations:

- Invoice Data Entry Lines tab

- Repetitive Invoice Entry Lines tab

- General Ledger Distribution window accessed through Manual Check and Payment Entry

Click the Net Balance button to add the undistributed balance to the current line.

💡 **Your Sage 100 business partners at work!** This idea was a suggestion from 90 Minds, Inc. where "*More Minds Are Better Than One.*"

Form 1099-NEC Option in Form 1099 Tax Reporting

Nonemployee Compensation has been added to the Form Type list in Form 1099 Tax Reporting.

The 1099-NEC form was added in other locations in the 2020 update. For more information, see 1099-NEC Form Added under What's New in Version 2020.

Accounts Receivable

The following changes were made in the Accounts Receivable module.

Payments Tab Added to Invoice History Inquiry

A Payments tab has been added to Invoice History Inquiry. The tab shows all payments applied to the selected invoice.

You can click the Cash Receipts History button to view more details about payments processed through Cash Receipts Entry.

You can click the Payment Information button to view more details about credit card and ACH payments.

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Run Utility for Payments Today Fields as Scheduled Task

The utility used to update the Payments Today field, previously named ARWAR4, has been renamed AR_OpenInvoicePaymentsToday_ui. You can set up a scheduled task to run this utility in Task Scheduler.

Note that the logic behind the utility now runs automatically when you're working in Cash Receipts Entry and A/P from A/R Clearing.

Fixed Assets

The following changes were made in the Fixed Assets module.

Update in Period End Processing

The posting book check boxes in the Period End Processing window have been replaced by a grid with Book Name and Close Book columns. The Close Book column contains check boxes that you can select for the books that you want to process for period end.

This change was made to support the additional posting books added in Sage Fixed Assets version 2021.

Inventory Management

The following changes were made in the Inventory Management module.

Ability to Trace Item Use by Lot and Serial Number

You now have multiple options to trace where items from a particular lot or with a particular serial number have been used, including items used as bill and kit components.

Note that the ability to trace items is applicable only to transactions processed after you've installed this update .

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Where-Used Inquiry Window

A Where Used button has been added to the Lot/Serial Inquiry window accessed from the Main menu or from Item Maintenance. You can click the Where Used button to see where items from the current lot or with the current serial number were used as a component of a sales kit or a bill. The button is available when you select a Sales Order invoice with the type SI, or a Production Entry transaction with the type BI.

Other Changes in Lot/Serial Inquiry

Additional changes have been made to the Lot/Serial Inquiry window accessed from the Main menu.

- The item code and description now appear on the main window instead of in the list box.

- If a lot or serial number has more than one item associated with it, the Item List window automatically opens so that you can select an item.

- The item code has also been removed from the Search for Lot/Serial Transactions window.

- The Zoom button has been renamed History Inquiry.

- When you click the OK button, the information displayed in the window is cleared, and you can select a different lot or serial number.

Customer Recall Report

The new Customer Recall Report has been added to the Reports menu, and it can be accessed from Lot/Serial Inquiry when the task is accessed from the Main menu.

Use this report to view a list of customers to whom you have sold or shipped lot or serial items that must be recalled.

Lot Serial Transaction History Report

A Print Where-Used Items check box has been added to the Lot Serial Transaction History Report. When this check box is selected, the report shows the transactions in which lot and serial items have been used either as a standalone item or as a component of a bill or sales kit.

We're listening! Lot and serial traceability was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Library Master

The following changes were made in the Library Master module.

Exclude Tasks and Events from Reports Based on Access

You can exclude unnecessary information from reports by clearing the Include Tasks and Events with No Access check box.

The check box has been added to the following report tasks:

- Role Report

- User Report

If this check box is cleared, the tasks and events to which the role or user has no access are excluded from the reports.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

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Visual Integrator

The following changes were made in the Visual Integrator module.

Filter Options for Job Log

A Filter List button has been added to the Job Log window. You can filter by the status (failed or skipped) or you can filter by records that passed but have one or more invalid fields.

Export Option for Job Log

After filtering records for an import job using the new Filter List button, you can click the Export List button to export two files:

- A file that contains the filtered records. This file is the same type as the original source file, and the records are formatted the same way so that you can make corrections and then import the file again.

  If the job definition indicated that the first record in the original source file is a list of field names, this record is copied as the first record in the new output file.

- A text file with information on why each record failed.

The files are exported to the same folder where the original file is stored. The file names will match the original source file name with the time and date appended.

Row Number in Job Log

When importing data using either an ASCII file or a delimited file as the source, the row number from the source file appears in the Job Log.

ALE Lookups For Job Numbers

ALE lookups are now used when selecting jobs in the following locations:

- Export Job Selection window that opens when you start Export Job Maintenance

- Import Job Selection window that opens when you start Import Job Maintenance

- Copy From button and Chain To fields in Export Job Maintenance and Import Job Maintenance

- Job Select

Browse Buttons on Log Detail Window

Browse buttons have been added to the Record Detail window. Use the buttons to navigate to the next, previous, first, and last record.

Company Colors Used for Import and Export Jobs

If you have a company-specific background color set up in Company Maintenance, the color is now used for certain screens in Visual Integrator when you're working with import and export jobs. For example, you'll see the color when you select a job, and view the job log. Not all screens are affected because Visual Integrator is not company-specific.

Your Sage 100 business partners at work! This idea was a suggestion from 90 Minds, Inc. where "*More Minds Are Better Than One.*"

What's New in Version 2020

The following changes were made in Sage 100 2020.

Global

The following changes are carried throughout multiple modules.

Expanded Name Fields

The following fields have been expanded to 50 characters:

- Customer name
- Customer contact name
- Vendor contact name
- Confirm to name
- Requested by name

The fields previously held 30 characters. Note that the field for vendor names was expanded to 50 characters in a previous release.

We're listening! This idea was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Expanded Fields for Address Information

The following fields have been expanded for customer, vendor, and employee addresses:

- Address lines: from 30 to 40 characters
- City: from 20 to 30 characters
- Country name: from 30 to 50 characters

Changes for Telephone and Fax Fields

The following changes have been made for telephone and fax number fields.

- Telephone and fax number fields have been expanded from 17 to 20 characters.

- The telephone extension field has been expanded from 5 to 6 characters.

- A Type field has been added for customer, vendor, and contact telephone numbers. You can select Work, Cell, Home, or Other.

- A Primary check box has been added for the two telephone number fields in Customer Contact Maintenance and Vendor Contact Maintenance.

International Address Support

You can now enter an international address for customers, vendors, and contacts. To support international addresses, the following changes have been made:

- The Country field has been moved above the address lines. A country code is needed to ensure that the correct city and state or province is entered based on the ZIP or postal code.

- ZIP Code fields have been renamed ZIP/Postal Code.

- State fields have been renamed State/Province.

- Telephone and fax number fields support international number formats.

- In Company Maintenance, the following changes were made:

- On the Main tab, the following fields were added: Country, ZIP/Postal Code, City, State/Province.

- An Additional tab was added to this task. The federal and state tax ID number fields were moved to this tab, and fields for contact information and a trade name were added.

- On the Preferences tab, a Default Country Code field was added.

Maintenance Task for State and Province Codes

State/Province Code Maintenance has been added to the Library Master Setup menu. State and province codes are maintained for each country code. You can enter and maintain the state or province name, alternate code, and geocode. The state and province codes for Canada and the United States are prepopulated.

Default Country Code

A Default Country Code field has been added to the Preferences tab in Company Maintenance. The default code will be automatically used in data entry and maintenance tasks, but it can be changed.

Data Conversion

When you convert your company data from an earlier version of Sage 100, USA will automatically be entered as the default country code on the Preferences tab in Company Maintenance.

Various Task Window Updates

To accommodate the expanded fields and longer field labels, some task windows have been resized, and fields were rearranged on others. In some instances in which the field is view-only, it may be truncated due to space constraints.

Report and Listing Updates

Reports and listings have been modified to accommodate updated fields and formats. The longer customer and contact names are accommodated if they print on a separate line or if there is enough space.

Form Updates

The expanded field sizes are reflected in the work tables, but the forms have not been updated to accommodate the expanded fields.

The Country, City, State/Province, and ZIP/Postal Code fields added in Company Maintenance have been added to the work tables, but they have not been added to the forms. The forms still print the information in the four address lines that were on the window prior to this release.

Country Code Selections Grid Option

A Country Code field has been added to the Selections grid for various form printing tasks. For any source documents with no value in the Country Code field, the default country code entered in Company Maintenance will be used for selection purposes.

Import Jobs

Any Visual Integrator import 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**. Earlier versions have not been updated to support international addresses, and you will encounter errors. More changes to support international addresses are planned for Sage 100 Payroll 2.20.2.

💡 We're listening! This idea was a suggestion on the [Sage 100 ideas site](). Visit the ideas site to share your ideas and vote for your favorites.

Map Service Choices

You now have a choice of which map service to use when you click a Map button next to address field. A Select Map Service field has been added to the following locations:

- The Preferences tab in User Maintenance.

- The User Settings window accessed from the File menu.

You can select Bing Maps, Google Maps, or MapQuest.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

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Export to Excel Button Added for List Boxes

An Export to Excel button allows you to export the contents of a list box to Microsoft Excel. The button has been added for numerous list boxes throughout Sage 100.

As part of this enhancement, the related module option in Role Maintenance has been renamed Allow Export to Excel from Lookups/Grids/Lists.

Add PII Work Tables To Custom Reports

You can add multiple work tables that contain personally identifiable information (PII) to custom reports. When running the Menu Wizard accessed through Report Manager, if you're adding a custom report for which work tables that contain PII are available, you'll have the opportunity to add them. Note that users' ability to view PII is dependent on their role security. Currently only the General Ledger and Payroll modules include work tables that contain PII.

Admin Rights Not Required for Workstation Synchronization

You no longer need administrative rights on your workstation to run the Workstation Synchronization program that automatically starts after some Sage 100 updates are installed on the server.

To eliminate the need for administrative rights, some files are now installed in a different location. The Sage folder that was previously installed in this location:

C:\Program Files (x86)\Common Files

Is now installed in this location:

C:\Program Data

New Desktop Utilities

You can access two utilities from the Sage 100 Desktop File menu.

Customization Import

Use this utility to import custom settings if you were using the classic Desktop in an earlier version of Sage 100 and made any of the following customizations:

- Added tasks to a public or private folder on the My Tasks tab

- Added tasks or shortcuts to other programs to the button bar

If you're using the latest version of Sage 100 on the same workstation as your earlier version, the utility adds your public and private tasks and shortcuts to other programs to the Favorites panel on the standard Desktop.

To start this utility, on the Desktop File menu, point to Desktop Utilities, and click Customization Import.

Logging Level

Use this utility if asked to do so by Sage customer support. This utility was previously accessed by browsing to the ..\MAS90\Launcher\ folder and double-clicking launcher.logging.exe.

To start this utility, on the Desktop File menu, point to Desktop Utilities, and click Logging Level.

Links to Sage University Training

A Sage University button () has been added to additional task windows in the Common Information and Library Master modules and to the Visual Process Flows Manager window.

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.

Accounts Payable

The following changes were made in the Accounts Payable module.

Encrypt PII for Inactive Vendors

As a means to comply with consumer privacy laws that require you to either delete or deidentify personally identifiable information (PII) so that it can't be used to identify an individual, there are two

ways to encrypt an inactive vendor's PII:

- An Encrypt button has been added to the Additional tab in Vendor Maintenance.

- An Encrypt Vendor Personally Identifiable Information utility has been added to the Accounts Payable Utilities menu. You can use this utility to encrypt vendor PII if the vendor's record has already been deleted in Vendor Maintenance.

After PII is encrypted, it no longer appears in task windows or reports. Furthermore, the data cannot be viewed in Data File Display and Maintenance or accessed through Visual Integrator or external reporting using an ODBC data source. For more information, see *Encryption for Inactive Vendors' Personally Identifiable Information* in the help.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Reverse Check Run Utility

A Reverse Check Run utility has been added to the Accounts Payable Utilities menu. You can use this utility to reverse an entire check run. Check runs are selected by entering either a register number or a bank code and check number. Checks with a type of Auto (a standard check) and Electronic that are posted to the cash disbursements journal can be reversed.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

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New Options for Retaining Paid Invoices

Two new fields have been added to the Additional tab in Accounts Payable Options:

- Months to Retain Paid Invoices (replaces Days to Retain Paid Invoices)

- Purge Paid Invoices During

You can enter a value ranging from 0 to 9,999 in the months field, and select whether paid invoices are purged during period-end or year-end processing.

> **Note:** These fields are available if you purchased Sage 100 through a subscription plan; otherwise, you'll still have the Days to Retain Paid Invoices field.

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1099-NEC Form Added

The IRS is introducing Form 1099-NEC, used to report nonemployee compensation, for tax year 2020. Nonemployee Comp (to be used for Form 1099-NEC) is now available to select in the following locations:

- Vendor Maintenance – Default Form field on Additional tab

- 1099 Payment History window – 1099 Form Type field

- A/P Invoice Data Entry – (1099 Payment) Form field on the Header tab

- Manual Check and Payment Entry – 1099 Form field on the Lines tab

Because From 1099-NEC is now used for nonemployee compensation, changes have been made to Form-1099 MISC. Included in the changes, Box 7 is now used for the Payer Made Direct Sales of $5,000 or More check box. For more details on the form changes, see the IRS website: www.irs.gov/instructions/i1099msc

In Vendor Maintenance, the Misc Box 9 check box has been renamed Payer Made Direct Sales $5000+. This check box is now used for Box 7 on Form 1099-MISC.

If you've already recorded nonemployee compensation for tax year 2020 in Box 7, a utility is available to more the totals to Box 1. Contact Sage Support for more information.

Unlimited Cost Types in Open Invoice By Job Report

You are no longer limited to selecting only 12 cost types when printing the Open Invoice by Jobs Report. In the Cost Types to Print section of the task window, the check boxes for individual cost types have been replaced with a Select Cost Types button. Click this button to open the Cost Type Selection window and select all cost types needed for the report.

Relocation of Paperless Option in Vendor Maintenance

To access the Paperless Office Delivery Options window from Vendor Maintenance, click the arrow in the top-right corner of the window, and then select Paperless Delivery Options.

Accounts Receivable

The following changes were made in the Accounts Receivable module.

eInvoicing for Accounts Receivable Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a link for online payments. Customers can use the payment

link to make online credit card and ACH payments. If you're using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.

There are two ways to enable eInvoicing for customers:

- To enable the feature for an individual customer, select the eInvoice Payments check box on the Additional tab in Customer Maintenance.

- To enable the feature for a range of customers, use the Global Customer Field Change utility.

An eInvoice Payments check box has been added to the Header tab in Invoice Data Entry. The check box is selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.

If the check box is selected, the invoice information is sent to Paya when the Sales Journal is updated, and the email with the invoice information and Pay Now link is then sent to the customer.

An eInvoice Payments button has been added to the Cash Receipts Deposit window. Click this button to import online payments.

A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration.

Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance. For more information, see the *eInvoicing* article in the Sage 100 help.

A utility, eInvoicing Error Log Viewer, has been added to the Accounts Receivable Utilities menu. After you update the Sales Journal, a message lets you know if there were any invoices that should have been sent to Paya Connect but were not. Use the viewer to see which invoices were not sent, view error information, and send the invoices to Paya Connect.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Viewing Addresses in Invoice History Inquiry

In Invoice History Inquiry, the address no longer appears on the Main tab. Click the new Addresses button to view the bill-to and ship-to addresses for the invoice.

New Options for Retaining Paid Invoices

Two new fields have been added to the Additional tab in Accounts Receivable Options:

- Months to Retain Paid Invoices (replaces Days to Retain Paid Invoices)

- Purge Paid Invoices During

You can enter a value ranging from 0 to 9,999 in the months field, and select whether paid invoices are purged during period-end or year-end processing.

> **Note:** These fields are available if you purchased Sage 100 through a subscription plan; otherwise, you'll still have the Days to Retain Paid Invoices field.

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Encrypt PII for Inactive Customers

As a means to comply with consumer privacy laws that require you to either delete or deidentify personally identifiable information (PII) so that it can't be used to identify an individual, there are two ways to encrypt an inactive customer's PII:

- An Encrypt button has been added to the Additional tab in Customer Maintenance.

- An Encrypt Customer Personally Identifiable Information utility has been added to the Accounts Receivable Utilities menu. You can use this utility if the customer's record has been deleted in Customer Maintenance.

After PII is encrypted, it no longer appears in task windows or reports. Furthermore, the data cannot be viewed in Data File Display and Maintenance or accessed through Visual Integrator or external reporting using an ODBC data source. For more information, see *Encryption for Inactive Customers' Personally Identifiable Information* in the help.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Relocation of Paperless Option in Customer Maintenance

To access the Paperless Office Delivery Options window from Customer Maintenance, click the arrow in the top-right corner of the window, and then select Paperless Delivery Options.

Custom Office

The following changes were made in the Custom Office module.

Improved Grid Customization

When you're editing a panel with a grid, right-clicking within the grid now opens the Customize Grid Definition window. The appearance of the grid is virtually identical to its appearance in Sage 100 task windows. As you edit the grid

- Drag and drop columns to rearrange them.

- If the panel has a primary and secondary grid, drag and drop columns to move them from one grid to another.

- Click a column label to open the Column Properties window, which lets you specify various properties, such the column length and description, and whether it's locked.

- Click the Add Column button to add additional columns.

- Access the Bulk Hide window, which lets you set the Hidden option for all columns in the grid.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

We're listening! This idea was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Apply Grid Customizations to a Customization Group

When selecting a customization group from the User list in the Customizer Panel Selection window, you can now customize the grid(s) included in the panel. The customized grids will be available to all users in the customization group.

Save UDF Changes in Pending Status

It's no longer necessary to choose between updating your user-defined field (UDF) changes right away or discarding them. UDF additions and modifications are now saved in a pending table. In the User-Defined Fields window, when you click Cancel, a message will let you know that your changes have been saved. You can return to the User-Defined Fields window at a later time to continue working on your changes and update them when you're ready.

A new task, Pending Changes Summary, has been added to the Custom Office Main menu. You can also access this task by clicking the Summary of Pending Changes button in User-Defined Field and Table Maintenance.

Use this task to view a list of pending changes. Click the Update All button to update all changes. If you have changes for multiple tables, a message appears after each table has been updated. You can click Continue to update the remaining tables or click Stop to leave the remaining changes in pending status to be updated at a later time.

When you have changes in pending status, a Pending folder appears beneath the module list in User-Defined Field and Table Maintenance. Expand the folder to view a list of tables with pending changes. You can select a table and click the Delete Pending Changes button to delete all pending changes for the table.

You can schedule an update of the pending changes using Task Scheduler.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Mask Information in Data Entry Fields

A Mask Display check box has been added to the Options tab in the Multi-Line Definition window. Select this check box to display filled-in circles in place of the actual characters when data is entered into this field.

Note that the data is **not** encrypted and it is masked only when displayed in task windows. For example, the actual characters would appear if this field is added to a lookup view or if you viewed the table in Data File Display and Maintenance.

A Mask Display check box has also been added to the Add/Edit Field window. If you select this check box, the Mask Display check box in the Multi-Line Definition window is selected by default when you add the UDF to a panel.

Inventory Management

The following changes were made in the Inventory Management module.

Expiration Dates for Lot and Serial Items

Expiration dates can be added for items with lot or serial numbers when items are received into inventory or produced through Bill of Materials. Expiration dates can be manually entered, or you can enter settings to automatically calculate them. You can also calculate sell-by, use-by, and return dates to determine how many days before or after an item's expiration date it can be distributed.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

The expiration date feature must be enabled in Inventory Management Options, and the related settings are entered in this task. However, you can override the settings for product lines and individual items in Product Line Maintenance and Item Maintenance.

For more information, see *Set Up Expiration Dates for Lot and Serial Items* in the Sage 100 2020 help.

Utility for Adding and Changing Expiration Dates

The Change Lot and Serial Expiration Dates utility has been added to the Inventory Management Utilities menu. Use this utility to add expiration dates for existing items and to change any expiration dates that have already been entered.

> **Note:** Before using the utility, you must:
>
> - Enable the expiration date feature in Inventory Management Options.
>
> - For applicable items, select the Track Lot/Serial Expiration Date check box in the Lot/Serial Expiration Settings window, accessed using the More button in Item Maintenance.

For more information, see *Change or Add Expiration Dates for Lot and Serial Items* in the Sage 100 help.

Change Lot/Serial Expiration Date from Item Maintenance

To change expiration dates for lots or serial numbers one at a time, click the Change Lot/Serial Expiration Date button, which has been added to the Cost Detail tab in Item Maintenance.

Option to Exclude Expired Items From Reorder Calculations

An Include All Expired Lot/Serial Items in Quantity Available check box has been added to the following windows:

- Auto Reorder Selection (Purchase Order)

- Inventory Reorder Report (Inventory Management)

You can clear this check box to exclude expired items from the calculation of the available quantity.

Forms, Reports, and Registers

A new report, Lot Serial Expiration Status Report has been added to the Inventory Management Reports menu. Use this report to view a list of items' expiration dates. You can also use the report to view a list of items that are missing an expiration date or a list of items that are expired as of a specified date.

The expiration date is printed on the reports and registers listed later in this section if the Track Lot/Serial Expiration Dates check box is selected in Item Maintenance.

If applicable, the expiration date prints on the following registers:

- Bill of Materials registers:

  - Production Register

  - Disassembly Register

- Inventory Management registers:

  - Transaction Register

  - Physical Count Variance Register

- Count Card Variance Register
- Purchase Order registers:
  - Receipt of Goods Register
  - Return of Goods Register
  - Material Requisition Register

If applicable, the expiration date is printed on the following reports:

- Bill of Materials reports
  - Production History Report
- Inventory Management
  - Inventory Detail Transaction Report
  - Lot/Serial Transaction History Report
- Purchase Order
  - Receipt History Report (if the Print Lot/Serial Information check box is selected)
- Return Merchandise Authorization reports (if the Print Lot/Serial Information check box is selected)
  - Return Reason Report
  - RMA Receipts History Report
- Sales Order reports (if the Print Lot/Serial Distributions check box is selected)
  - Shipping History Report
  - Open Sales Order Report
  - Open Sales Order by Item Report
  - Open Sales Order by Promise Date Report
  - Open Sales Order by Job Report
  - Lot and Serial Number History Report

The expiration date has been added to the worktables for the following forms to make it easier to add the field to the forms if needed.

- A/R invoice (historical)

- B/M production label

- I/M receipts label

- P/O return order

- R/A customer RMA

- R/A RMA receiver

- S/O sales order

- S/O picking sheet

- S/O invoice

- S/O packing list

🔅 We're listening! This idea was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Job Cost

The following changes were made in the Job Cost module.

Option for Expensing Work-In-Process Costs

A new field, Recognize WIP when Billing % Complete Jobs, has been added to the Main tab in Job Cost Options. This field is available when the (Post to General Ledger) Work in Process check box is selected.

There are two options available in this field:

- Select Actual Costs to expense WIP costs using actual costs posted to the job that have not been previously billed as of the job billing date.

- Select % of Estimate to expense the WIP costs as cost of goods sold by multiplying the revised estimated cost by the job's completion percentage less the previously recognized estimated costs.

After converting company data from an earlier version of Sage 100, the default selection is Actual Costs. For new companies, the default selection is % of Estimate.

If you change the selection in this field, and there are open jobs that have been billed using the original method, the next time you process an invoice in which WIP is accrued, that accrual will include a reversal for costs recognized when you were using the previously selected WIP accrual method. Consider processing a zero-dollar invoice after making the change to process the reversal.

Actual % Complete Field

A new field, Actual % Complete, has been added to the locations listed below so that you can enter the job's completion percentage when processing invoices for the job.

- S/O Invoice Data Entry Header tab

- Shipping Data Entry Shipping tab

This field is available if:

- The Job Cost module is integrated with Sales Order.

- In Job Cost Options, % of Estimate is selected in the Recognize WIP when Billing % Complete Jobs field.

- In Job Maintenance, for the selected job, Percentage of Completed is selected in the Acct Method field, and Fixed is selected in the Billing Method field.

A view-only Job No. field has also been added to the Shipping tab in Shipping Data Entry.

eInvoicing for Job Cost Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a link for online payments. Customers can use the payment link to make online credit card and ACH payments. If you're using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.

An eInvoice Payments check box has been added to the Header tab in Job Billing Data Entry. The check box is available and selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.

If the check box is selected, the invoice information is sent to Paya when the Job Billing Register is updated, and the invoice is then emailed to the customer. For more information, see the *eInvoicing* article in the Sage 100 help.

A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration. Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance. For more information, see the *eInvoicing* article in the Sage 100 help.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Library Master

The following changes were made in the Library Master module.

Conversion Options

Two new options in the Convert Module Data Files window allow you to do more when converting company data.

Convert SAP Crystal Reports

If you select the Convert SAP Crystal Reports check box, the custom reports and forms for active modules are converted to the current level when you run conversion.

After the company data conversion is complete, anyone logged into Sage 100 can continue working while the reports and forms are being converted.

The amount of time needed to convert company data is not affected by the SAP Crystal Reports conversion.

Update Custom Office Panels to Current Level

If you select the Update Custom Office Panels to Current Level check box, the Custom Office panel update is run for any customized panels for the companies being converted. This update runs without any prompts.

Purchase Order

The following changes were made in the Purchase Order module.

Apply Multiple Purchase Orders to An Invoice or Receipt

In Receipt of Invoice Entry and Receipt of Goods Entry, an Apply Purchase Orders button has been added next to the Purchase Order Number field on the Header tab. After selecting the first order for the invoice or receipt, click this button to add additional orders.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

The first purchase order applied is considered the primary order. To add additional orders, the information in the following fields must match:

- Terms code

- Sales tax schedule for purchase order

- Sales tax schedule for purchase address

- Shipping code (entered in Ship Via field)

Reports, Forms, and Registers

The documents listed below have been modified to display "Multiple" in the purchase order number field if more than one order has been applied to the applicable document.

- Receipt of Goods Register

- Receipt of Invoice Register

- Daily Purchases Journal

- Receipt History Report

- A/P Invoice History Report

Inquiry Windows

In Receipt History Inquiry and A/P Invoice History Inquiry, "Multiple" appears in the purchase order number field if multiple purchase orders were applied to the receipt or invoice. You can click the Multiple Purchase Orders zoom button to view a list of orders applied to the document.

In both inquiry windows, if multiple purchase orders with prepayments were applied to the receipt or invoice, the total prepayment amount from all orders appears in the prepayment field. You can click the Prepayments button to view a list of applied purchase orders, along with the prepayment amount and check number.

Landed Cost Calculation

If entry of landed cost is enabled in Purchase Order Options and Automatic Update is selected for the FRGHT cost type in Landed Cost Maintenance, the landed cost for all purchase orders applied to a receipt of goods is totaled and allocated to each line item.

If entry of landed cost is not enabled, the freight amount for all orders applied to the receipt is totaled and allocated to each line item based on the selection in the Allocate Freight on a Line Item Basis field in Purchase Order Options.

We're listening! This idea was a suggestion on the Sage 100 ideas site. Visit the ideas site to share your ideas and vote for your favorites.

Sales Order

The following changes were made in the Sales Order module.

eInvoicing for Sales Order Invoices

Through the eInvoicing feature that works with Paya Connect Desktop, you can send your customers emails that include an invoice summary and a Pay Now link. Customers can click the Pay Now link to make online credit card and ACH payments. If you're using Paperless Office for invoicing, the invoice PDF is attached to the email. After customers make online payments, you can import them into Cash Receipts Entry.

An eInvoice Payments check box has been added to the Header tab in Invoice Data Entry. The check box is available and selected by default if the eInvoice Payments check box in Customer Maintenance is selected, but you can clear it as needed.

If the check box is selected, the invoice information is sent to Paya when the Sales Journal is updated, and the invoice is then emailed to the customer. For more information, see the *eInvoicing* article in the Sage 100 help.

A merchant account with Paya (formerly Sage Payment Solutions) is required to use eInvoicing. Paya will provide you with a user ID and API key, which you must enter in System Configuration.

Next, enable the feature in Company Maintenance, and then you can enable it for customers in Customer Maintenance or by using the Global Customer Field Change utility. For more information, see the *eInvoicing* article in the Sage 100 help.

> **Note:** This feature is available if you purchased Sage 100 through a subscription plan.

Visual Integrator

The following changes relate to the Visual Integrator module.

Change for Import Jobs that Include Addresses

Any import jobs that include address information **must be modified to include the CountryCode column**, and it must be imported before the ZipCode column. This requirement is related to changes made to support international addresses. For more information, see "International Address Support" (page 14).

Office 365 Integration

A new screen has been added to the Sage 100 Office Configuration wizard. On the Microsoft Power Apps and Power Automate screen, if you select the check box, the information needed to create a custom connector appears on the last page of the wizard.

The same information is automatically copied to the Windows clipboard so that you can paste it into a document to reference when setting up your custom connector. This is required if you plan to use Power Automate or Power Apps that work with your Sage 100 data.

Retired Features

The following features are no longer available in version 2020.

Classic Desktop

The classic version of the Sage 100 Desktop is no longer available. To learn more about the standard version of the Desktop, refer to the following resources:

- To watch a video providing an overview of the standard Desktop, click the Help tab at the top of the Desktop, and then click Tour the Desktop.

- To read detailed instructions on using and customizing the Desktop, see the *Getting Started Guide*, which is available on the [Sage 100 documents page](#).

If you were using the classic Desktop and had created public or private tasks or customized the button bar, you can run a utility to add those tasks and/or programs to the Favorites panel in the standard Desktop. For more information, see "Customization Import" (page 17).

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