



# **Sage 100 2022**

## **What's New Guide**

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# What's New in Sage 100

This document describes the enhancements added in Sage 100 version 2022 and subsequent updates. Changes to the Sage 100 Desktop are listed first, followed by global changes, module-specific changes, any updates to Microsoft 365 integration, retired features, and then a list of features that are now available for the non-subscription version of Sage 100.

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

# What's New in Version 2022.3

The following enhancements were added in update 3 for Sage 100 2022.

## Accounts Payable

The following changes were made in the Accounts Payable module.

## Form 1099 Tax Reporting Version

Form 1099 Tax Reporting has been updated to version 2.98.

## DBA Name for 1099 Forms

There has been a functionality change of where the 1099 DBA Name field prints on the 1099 Form.

If there is a name entered in the DBA Name field on the Additional tab in Vendor Maintenance, it will now print on Line 1 of the Recipient Name box of the 1099 Form and the Vendor Name will print on Line 2 of the Recipient Name box of the 1099 Form.

## Updates for 1099 Form Tax Reporting

The following options have been added to support Form 1099 printing for tax year 2022:

- For the 1099-DIV Form:
  - Box 11 is now FATCA filing requirement check box.
  - Subsequently, old box numbers 11 through 15 have been renumbered to new box numbers 12 through 16, respectively. The new boxes are as follows:
    - Box 12 - Exempt-interest dividends
    - Box 13 - Specified private activity bond interest dividends
    - Box 14 - State

- Box 15 - State Identification No.
- Box 16 - State Tax Withheld
- For the 1099-MISC Form:
  - Box 13 is now FATCA filing requirement check box
  - Subsequently, old box numbers 13 through 17 have been renumbered to new box numbers 14 through 18, respectively. The new boxes are as follows:
    - Box 14 - Excess golden parachute payments
    - Box 15 - Nonqualified deferred compensation
    - Box 16 - State tax withheld
    - Box 17 - State/Payer's state no.
    - Box 18 - State Income

## **Production Management**

### **Work Ticket Entry Copy From**

In the Work Ticket Entry Copy From window, the Production Start Date field has been added to simplify the process of copying a work ticket.

During the copy process, the system will calculate the number of days between the start date entered here and the source work ticket start date. The difference between the dates will be used to automatically adjust all of the scheduling dates in the source work ticket steps as they are copied.

# What's New in Version 2022.2

The following enhancement was added in update 2 for Sage 100 2022.

## Accounts Receivable

### Option to Print Zero Balance Customers with No Invoices

The Customers with No Invoices check box has been added to Statement Printing. You can select this check box to print statements for zero balance customers that do not have any invoice detail printing on the statement.

# What's New in Version 2022.1

The following enhancements were added in update 1 for Sage 100 2022.

## Inventory Requirements Planning

The Inventory Requirements Planning (IRP) module is now compatible with the version of Production Management that was released in Sage 100 2022. The updated version of Inventory Requirements Planning is automatically installed with update 1 if you have the Production Management module installed. Inventory Requirements Planning is automatically registered if Production Management is registered, so you do not need a new license key.

## Data Conversion and Material Requirements Planning

If you already have the Material Requirements Planning (MRP) module installed, Inventory Requirements Planning is still installed, but you cannot have both modules activated for the same company at the same time. Activating IRP for a company deactivates MRP for that company.

When you open Inventory Requirements Planning Options, you will be asked if you want to convert your MRP data to IRP data. If you convert your MRP data, your MRP data files are deleted after the conversion process is complete. You can choose not to convert your MRP data and proceed with the IRP setup, and this will remove your MRP data.

## Maintain Projected Demands

Maintain Projected Demands has been added to the Main menu. You can use Maintain Projected Demands to manually enter demand information before generating the IRP data file that's used to show demand and create work tickets and purchase orders.

## Library Master

The following enhancements were added in the Library Master module.



## Data File Display and Maintenance Updates

The following changes have been made in Data File Display and Maintenance:

- Two new options have been added to the Operator list in the Filter window:
  - Contains CRLF: Use this operator to find records that contain carriage return/line feed characters.
  - Non Printable: Use this operator to find records that contain non-printable characters.
- In the Select Fields window, you can select up to 25 fields to display in columns in the Key Scan window.

## OAuth Authentication Method for SMTP Mail Server

In Company Maintenance on the E-mail tab, you can now select the OAuth authentication method for your SMTP mail server even if you purchased Sage 100 through a perpetual license. Previously the OAuth authentication method was available only if you purchased Sage 100 through a subscription plan.

# What's New in Version 2022

The following enhancements were added in Sage 100 2022.

## Sage 100 Desktop Changes

The following changes were made to the Sage 100 Desktop.

### Add Public Favorites

You can add tasks and other items to the new Public Favorites group. These items are listed on the Favorites panel when you click Public Favorites, and they are available to all Sage 100 users. For Sage 100 tasks, access is based on the users' security setup. For instructions, see [Add Items to the Favorites Content Group](#) in the Sage 100 help.


## Global Changes

The following changes are carried throughout multiple modules.

### Exclude Inactive Items From Lookups


A **Display Inactive Items** check box has been added to the ALE Lookups section on the **Preferences** tab in Company Maintenance. Clear this check box to exclude items from Lookups if the **Inactive** check box in Item Maintenance is selected for the item.

For more information, see the [field help for the Display Inactive Items check box](#).

 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the [Sage 100 ideas site](#).

### Option to Save Date Selections for Reports

When creating or modifying a report setting, you can specify whether you want to save the dates entered in the Selections grid. To save the dates, select the **Save Date Selections** check box that has been added to the Save As Report Setting window. Clear the check box to omit the dates from the report setting. The check box is selected by default.

 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the [Sage 100 ideas site](#).

## Default Years to Retain History

In module options tasks in which you can specify how many years to save history, the default setting is now five years. The minimum required number of years to retain history has not changed, and this update will not affect your existing settings.

## Accounts Receivable

The following changes were made in the Accounts Receivable module.

### Pay Cycle Option

A new check box, **Allow employees with other pay cycles for bonus and commissions**, has been added to the **Pay Cycle** window that opens when you're updating the **Commission Edit Register**.

Select this check box when you're processing a pay run that falls outside of employees' regular pay cycle assigned in **Employee Maintenance**. For example, select the check box if employees are typically paid weekly, but you're paying a monthly bonus.

**Note:** This check box is available only if you're using Sage 100 Payroll version 2.22 or later.

### Search for Quotes

A **Quotes** check box has been added to the Search for Open Orders window accessed from the **S/Os** tab in Customer Maintenance. Select this check box to find quotes for the current customer.

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

## Business Insights

The following views have been added to the Business Insights Explorer menu and the Production Management Explore menu. The views that are indented underneath each primary view are the secondary views available in the Explore navigation pane when you access the primary view.

- History Work Tickets View
  - History Work Ticket Steps
  - Work Ticket Line Items
  - Purchase Order Line Items PM
- Open Work Tickets View
  - Open Work Ticket Steps
  - Work Ticket Line Items
  - Purchase Order Line Items PM
- Work Ticket Labor View
  - Open Work Tickets
  - Open Work Ticket Steps

## Inventory Management


The following changes were made in the Inventory Management module.

### More Options When Uploading Images

When you're uploading images in Item Maintenance, you can now use the following image types:

- JPEG
- PNG
- TIFF

You can still use the types that were previously available as well (JPG, GIF, and BMP).


 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.

## Order Type Options on Search for Sales Orders Window

When searching for orders using the Search for Sales Orders window, you can select check boxes corresponding to the order types to include in your search results. All sales order types are now available, including quotes, master orders, and repeating orders.

Also a **Quoted** field has been added to the bottom of the tab. The field displays the item's quantity used in Sales Order quotes.

The Search for Sales Orders Window can be accessed from Item Maintenance and Item Inquiry.

 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the [Sage 100 ideas site](#).

## Changes Related to Production Management

The following changes, which are related to the Production Management module, were made in Inventory Management.

**Note:** If custom labels have been entered in the Terminology fields in Production Management Options, the custom text appears in place of the default terminology.

### Changes in Item Maintenance

The following changes are applicable if the Production Management module is activated.

- The options in the **Procurement** field on the **Main** tab are Make to Stock, Buy to Stock, Buy to Order, and Subcontract.
- An **On WT** column is included in the **Quantities** box on the **Main** tab and on the **Quantity** tab. The column shows the total quantity being produced for the parent item on work tickets with a status of **Released**.
- A **Req for WT** column is included in the **Quantities** box on the **Main** tab and on the **Quantity** tab. The column shows the total quantity being consumed for the raw material on work tickets that have a **Released** status.

If the **Include Open Work Ticket Materials as Inventory Demand** check box in Production Management Options is selected, then open work tickets are also reflected in this column.

- On the **Additional** tab, the **Template No.** field appears instead of the **Routing No.** field.
- On the **Quantity** tab, the following columns have been added:
  - On WT
  - Req for WT
- On the **Transactions** tab, the following columns have been added:
  - Work Ticket No.
  - Step No.
  - Work Ticket Description
- On the **Orders** tab, the following have been added:
  - Work Ticket display option
  - Work Ticket No. column
  - Work Ticket Description column
  - Step No. column

## Other Changes

- The text on the Configure Quantity Available Calculation window and the summary window references work tickets instead of work orders if the Production Management module is installed.
- You can choose whether to include work ticket quantities in the quantity available calculation when you're running the Inventory Management Setup Wizard if the Production Management module is installed.
- The text on the Item Status window references work tickets instead of work orders if the Production Management module is installed.
- In **Product Line Maintenance**, if the Production Management module is activated, the options in the **Procurement** field are Make to Stock, Buy to Stock, Buy to Order, Subcontract.

# Production Management

The following changes were made in the Production Management module.

## Installing Production Management

The Production Management module is now part of the Sage 100 installation program. The module is no longer available as a separate installation.

## Setup Wizard

A new setup wizard has been added to guide you through setting up the module.

## Production Management Options

The following changes were made in Production Management Options.

- A **Years to Retain Work Ticket History** field has been added to the **Main** tab.
- A **General Ledger** check box has been added to the Integrate with section on the **Main** tab.
- A record is written to the Activity Log after Payroll data is synchronized with Production Management.
- The **Dynamic Materials** check box, which enables the feature, is now on the **Entry** tab.
- A **User Defined** tab has been added. This tab replaces the Miscellaneous Codes Maintenance task, which is no longer available. Use this tab to create generic code classes that are used to categorize the codes created in User Defined Info Codes Maintenance.

## Work Ticket Template Maintenance

The following changes were made in Work Ticket Template Maintenance.

- When using the Copy From feature, you have the option to copy memos.
- On the **Materials** tab, the following buttons have been added: **Alias Item** and **Item Quantity Inquiry**
- An **Add Attachment** button has been added to the **Attachments** tab.

## Employee Maintenance

The following fields were added to the Employee Maintenance window:

- Telephone Ext
- Telephone Type
- E-mail Address
- Pay Method
- Autopay Hours

## User Defined Info Codes Maintenance

User Defined Info Codes Maintenance has replaced Miscellaneous Codes Maintenance. Use this task to create codes that can then be applied to work ticket templates. You must first create code classes on the **User Defined** tab in Production Management Options.

## Attachment Category Maintenance

Attachment Category Maintenance has been added to the Setup menu. Use this task to maintain attachment category codes and descriptions.

## Work Ticket Entry

The following changes were made in Work Ticket Entry.

- You can now create and maintain memos for work tickets and steps.
- The **More** button has been removed and an **Attachments** button has been added.
- A **Labor Issue Method** field with a drop-down list has been added.
- A Materials Issue Method field with a drop-down list has been added.
- When creating a work ticket, bill numbers and template numbers are now entered on the **Header** tab. The option to copy from bills and templates has been removed from the Copy From window.
- When using the Copy From window, you now choose to copy from either an open work ticket or work ticket history.

## Labor Entry

Labor entries are now entered in a primary and secondary grid in which multiple records for the same day can be viewed and modified.



Labor entries are no longer updated to the Payroll module by updating the Periodic Labor Register. Instead, you now import labor entries into Payroll using the **Labor** button on the **Pay Cycle** window. For more information, see ["Payroll Integration Changes" \(page 14\)](#).

## Materials Where-Used Inquiry

In Materials Where-Used Inquiry, you have the option to view material usage in either work tickets or templates. Also you can sort by multiple columns.

## Payroll Integration Changes

The following changes related to integration with the Payroll module have been made in Production Management.

- The Periodic Labor Register has been renamed Periodic Labor Report. This report is no longer used to push labor entries to the Payroll module for use in Payroll Data Entry.
- Labor entries are now imported into Payroll by clicking the **Labor** button on the **Pay Cycle** window. Labor Entry records can be imported into Payroll only if **Yes** is selected in the **(Integrate with) Payroll** field in **Production Management Options**.

## Data Conversion for Work Order

If you're upgrading from an earlier version of Sage 100, Work Order data is included in your source company, and the Production Management module is installed in your target company, your Work Order data is converted to Production Management data.

**Note:** If you had purchase orders linked to work orders in your source data, the purchase orders will not be linked to the converted work tickets after you run conversion. You must manually relink the purchase orders.

## Data Conversion for Earlier Version of Production Management

The Production Management module code has changed from JT to PM. When you convert Production Management data from an earlier version of Sage 100, the converted company data files are changed to use the PM prefix.

**Important!** If you're upgrading from the standalone version of Production Management that was previously available, you must be on version 2021.x of the standalone version before upgrading to the Production Management module that is part of Sage 100 2022.

**Note:** Report settings saved in the standalone version of Production Management are not migrated to the version of the module available with Sage 100 2022.

## Sage Intelligence Reporting

Sage Intelligence Reporting now works with the 64-bit version of Sage 100 and Windows.

## Sales Order


The following changes were made in the Sales Order module.

### View Order Type, Ship Date, and Expire Date in History

The following fields have been added to the Sales Order and Quote History Inquiry window:

- Order Type
- Ship Date (for standard orders and back orders)
- Expire Date (for quotes)

These fields have also been added to the SO\_SalesOrderQuoteHistoryWrk table, so they can be added to forms.

 **We're listening!** This idea was a suggestion from 90 Minds, Inc., and it received multiple votes on the [Sage 100 ideas site](#).

## Visual Process Flows

The following changes were made to the Visual Process Flows Designer.

- You can select multiple elements at the same time by pressing the Shift key while selecting them with your mouse. You can move and resize the elements together and create permanent groups. For more information, see [Visual Process Flow Designer](#) in the Sage 100 help.
- Buttons with up/down and left/right arrows have been added to the Actions window. Use the buttons to move the Actions window to another area of the Designer window.
- Guidelines now appear when you start to move an element to help you align it with other elements in the Designer window.
- An **Underline** button has been added to the text formatting toolbar.
- You no longer have to press the Enter key to add text to an element.

## Work Order

The Production Management module has replaced Work Order. The Work Order module is no longer part of the Sage 100 installation program.

When running conversion, if your source company has Work Order data and the Production Management module is installed for version 2022, the Work Order data is converted to Production Management data.

**Note:** If your data includes work orders that are linked to purchase orders, you will have to manually relink the purchase orders to work tickets after you convert the data.

## Microsoft 365

References to Office 365, including task names, have been changed to Microsoft 365.

## Features No Longer Subscription Only

The following features were initially available only if you purchased Sage 100 through a subscription plan. They are now available to all users, regardless of whether Sage 100 was purchased as a subscription or perpetual license.

- **Spell Check:** A red line appears underneath misspelled words. You can right-click the word to view a list of suggestions, ignore the misspelling, or add it to your custom

dictionary.

- **Full Text Search in Lookups:** In Lookup views, in the **Search** list, you can select **Full Text**. Your search criteria is then matched against all text in the records instead of a single field.
- **Theme Maintenance:** This task, located on the Library Master Main menu, allows you to customize the appearance of Sage 100 windows.
- **Document Date Warnings:** This feature allows you to display a warning message when a user enters a date that is outside of settings defined in Company Maintenance.

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