



Sage 100 2015.5

What's New

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What's New

This document describes the enhancements included in the product updates for Sage 100 2015. Note that the latest product update incorporates everything that was added in the previous updates for version 2015. In other words, you only need to install the latest update to get all of the features described.

Product Update 5

Global Changes

Update Subscription Information

An Update button has been added to the Registration tab in System Configuration. If you've made changes to your subscription agreement, you can click this button to download your new product key. You can still manually enter your product key, and the system automatically checks for updates every 28 days when someone logs into Sage 100.

Credit Card Processing

Sage Payment Center

If you use Sage Payment Solutions for credit card processing, you can now use Sage Payment Center for greater visibility into your payment transactions. Use Sage Payment Center to:

- View payment stats, including recent activity, weekly and monthly totals, and recent deposits
- Settle daily transactions
- View and export reports for transactions, batches, deposits, and merchant statements
- Search for transactions by customer name, last four digits of card number, order number, reference number, and other criteria

For more information, go to the Information Center page and click the Sage Payment Solutions link.

After you've set up the Payment Center, it can be accessed from the following locations:

- The ribbon on the standard Desktop or toolbar on the classic Desktop
- The Accounts Receivable and Sales Order Main menus
- The Invoice and Receive Payment visual process flow

- The Entry and Invoice visual process flow

New Visual Process Flow

You can now access all of the tasks needed to set up credit card processing from one screen—the new Credit Card Setup visual process flow. Select the Visual Process Flows > Credit Card Processing > Credit Card Setup when you're ready to get started. Note that you must have access to the new process flow in Role Maintenance.

Security Settings

The following security events have been added to Role Maintenance under Library Master:

- Allow User to Access Credit Card Processing Application Form gives access to the Sage Payment Solutions application form when it's accessed through the embedded Desktop browser.
- Allow User to Access Payment Center gives access to the Sage Payment Center.

Product Update 4

Product Update 4 (5.20.4) includes the following enhancements in addition to those added in updates 1 through 3 for Sage 100 2015.

Accounts Payable

Updates for Form 1099-INT

On the 1099 Payment History window, the box numbers have been updated to correspond with Form 1099-INT for calendar year 2015..

Payroll

Sage 100 Direct Deposit Service

Sage 100 Direct Deposit, a product offered through Sage Payroll Services, is now available as part of the Payroll module. This service uses the same tasks as the existing direct deposit feature, but the process has been simplified.

- You no longer need to transmit the ACH file to your bank. Sage handles that for you.
- Less information is required in the Direct Deposit Interface Setup task.

To get started with the new service, complete the application form. A link to the form has been added to the Direct Deposit tab in Payroll Options.

Product Update 3

For setup instructions, see Setting Up Sage 100 Direct Deposit Service in the help or refer to the Sage 100 Direct Deposit Getting Started Guide available here:

http://cdn.na.sage.com/docs/en/customer/100erp/2015n/open/Sage100_DirectDeposit_GettingStartedGuide.pdf

Plan Start Month Field for Form 1095-C

A Plan Start Month field has been added in in ACA Employee Maintenance. The two-digit field is used for Part II of Form 1095-C.

Product Update 3

Product Update 3 (5.20.3) includes the following enhancements in addition to those added in updates 1 and 2 for Sage 100 2015.

Payroll

Updates for ACA Employer Maintenance

Several new fields were added to the ACA Employer Maintenance window.

- The ACA Forms to Use field allows you to select whether to use the 1094-C/1095-C forms or the 1094-B/1095-B forms when preparing forms in Federal eFiling and Reporting.
- You can enter a value in the new Policy Origin Code field to print on Form 1095-B in Part I, field 8 when using Federal eFiling and Reporting.
- The following check boxes allow you to select the corresponding check boxes on Form 1094-C in Part II, section 22 when preparing forms in Federal eFiling and Reporting: ?Qualifying Offer Method
 - Qualifying Offer Method Transition Relief
 - Section 9880H Transition Relief
 - 98% Offer Method

Product Update 2

Product Update 2 (5.20.2) includes the following enhancements in addition to those added in Product Update 1 for Sage 100 2015.

General Ledger

Sage Payroll Services Integration

Sage 100 ERP is now integrated with Sage Payroll Services (formerly known as PayChoice). You can upload general ledger account numbers and bank codes to Sage Payroll Services and download payroll transactions into Transaction Journal Entry.

After setting up an account with Sage Payroll Services, use the tasks on the General Ledger Payroll Services menu to set up the integration. For detailed steps, see *Integrate an Online Payroll Service with General Ledger* in the help system. To learn more, visit Sage Payroll Services at: <http://www.sage.com/us/sage-payroll-services>

This feature will not affect anyone using the previously existing online payroll service, BenefitMall. A Payroll Service field has been added to Sage Payroll Services Options, which allows you to select the online payroll service you are using. However, the correct option will be automatically selected when you upgrade from a system that was integrated with BenefitMall.

Product Update 1

The following enhancements were added in Product Update 1 (5.20.1) for Sage 100 ERP 2015.

Accounts Payable

Improved Message for Check Printing

When you attempt to print checks using a bank code that is currently being used by someone else, the message that appears will now let you know which type of check printing is in progress and which bank code is being used.

Check Total on Invoice Payment Selection Listing

The following information now appears at the end of the Invoice Payment Selection Listing:

- The total number of checks that will be printed. This total includes ACH entries if you have ACH payments enabled and you are printing remittance advices.
- The total number of checks that will not be printed. This total includes ACH entries if you have ACH payments enabled and you are not printing remittance advices.
- The total number of ACH entries (if you have ACH payments enabled and you are printing remittance advices).

Accounts Receivable

Purge Commission by Pay Date

A Pay Date field has been added to the select grid in the Salesperson Commission Purge window. The field is available only if the Commissions Paid on Paid Invoices Only check box in Accounts Receivable Options is selected.

Automatically Apply Changes to Repetitive Invoices

You can now specify whether changes to a customer's default shipping code, salesperson, tax schedule, or terms code made in Customer Maintenance are automatically applied to the customer's existing repetitive invoices. To enable this feature, select Yes or Prompt from the new Apply Changes to Repetitive Invoices field on the Additional tab in Accounts Receivable Options.

Customer Relationship Management

Workstation Setup Not Required to Manage Relationships

If you are using Sage 100 Advanced or Premium, you no longer need to run Workstation Setup to access Maintain Relationships within Sage CRM. To enable this feature, go to the ERP Preferences tab in Sage CRM, and select Web Forms Embedded in Sage CRM in the Access Sage 100 Tasks Using field. As part of this enhancement, that field name was changed from Default Form for Quotes/Orders.

Note that you will not have access to the Sage 100 Inquiry tasks if you use the embedded web forms to access Sage 100 tasks.

Promote Quote to Order from Quote Summary Screen

A Promote to Order button has been added to the Quote Summary Page in Sage CRM. When you click this button, the quote is promoted to an order in Sage CRM and Sage 100. Please note that the page will not automatically refresh after you promote a quote.

Quick Order Entry Print Options

When printing an order or quote from the Quick Order Entry screen in Sage CRM, you can now print to any printer on your network. The Email and PDF options are also still available.

General Ledger

Out-of-Balance Message Added to Report

If an out-of-balance source journal is included in the General Ledger Detail by Source Report, a not-in-balance message prints next to the journal number and near the report totals.

Payroll

ACA Menu

An ACA menu with three new tasks related to the Affordable Care Act has been added to the Payroll module.

- Use ACA Employee Maintenance to enter information that will appear on Form 1095-C.
- Use ACA Employer Maintenance to enter information that will appear on Form 1094-C.
- Use the ACA Applicable Large Employer Report to generate a count of your full time and full time equivalent (FTE) employees.

The totals can then be updated to the ACA Employer file, and they will appear in the ALE Member Information - Monthly window accessed from ACA Employer Maintenance.

For more information, refer to the help for these tasks.

Seasonal Employee Check Box

A Seasonal Employee check box has been added to the Wages tab in Employee Maintenance. When printing the ACA Applicable Large Employer Report, you have the option to include seasonal employees.

1095-C Electronic Consent Signed Check Box

A 1095-C Electronic Consent Signed check box has been added to the Tax Status window accessed through Employee Maintenance. If this check box is selected, 1095-C forms processed through Federal eFiling and Reporting will be sent as an electronic copy.

Purchase Order

Copy from History When Creating Return

A Copy From button has been added to the Return of Goods window. You can now enter a new return number and then click Copy From to copy information from one of the following:

- Purchase order history (if the Retain Purchase Order History check box is selected in Purchase Order Options)
- Purchase order receipts, with the exception of invoice receipts (if Yes or Until Period End is selected in the Retain Receipt History field in Purchase Order Options)

- Accounts Payable invoices (if the Post Accounts Payable Invoices check box is selected in Purchase Order Options and the Track Detailed Invoice/Payment History check box is selected in Accounts Payable Options)

Sales Order

Print Picking Sheet for Order when Customer Is on Credit Hold

A check box has been added to the following windows that allows you to select whether to print picking sheets for orders when the customer is on credit hold.

- Picking Sheet Printing
- Picking Sheet Printing (Quick Print)

New Way to Access Alternate Item Selection Window

An Alternate button has been added to the message that appears when you enter a discontinued item number in Sales Order Entry and S/O Invoice Data Entry. The button appears if the discontinued item has alternate items set up in Item Maintenance. You can click the Alternate button to open the Alternate Item Selection window.

Quote Promotion Date Added to Task Windows

A Promoted to Order On field has been added to the Header tab in the following tasks:

- Sales Order Entry
- Sales Order and Quote History Inquiry

If an order was promoted from a quote, this field displays the date on which it was promoted.

Visual Process Flows

New Visual Process Flows

The following visual process flows (VPFs) have been added. You must enable access to the new VPFs in Role Maintenance.

- Customer Billing menu
 - Job Billing
- Inventory menu
 - Physical Count Preparation

Product Update 1

- Manufacturing menu (new)
 - Production
 - Disassembly
 - Create Work Order
 - Complete Work Order
 - Close Work Order

- Period End menu (new)
 - Accounts Receivable
 - Accounts Payable
 - Inventory Management
 - Sales Order
 - Purchase Order
 - General Ledger Preparation
 - General Ledger

- Chart of Accounts menu (new)
 - Create Accounts