

Sage 100 2017

What's New

June 2017

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What's New

This document describes the enhancements included in Sage 100 2017 and subsequent product updates for version 2017.

The latest product update incorporates everything that was added in the previous version 2017 product updates. In other words, you only need to install the latest update to get the features described for all product updates.

Sage 100 2017.2

The following enhancements were added in Sage 100 2017.2.

Accounts Receivable

Payment Setup Wizard

A payment setup wizard has been added to help you set up credit card and ACH payment processing through Sage Exchange. After setting up your Sage Exchange account, the wizard will guide you through enabling credit card and ACH payment processing in Company Maintenance and creating payment types.

To start the wizard, on the Accounts Receivable Setup menu, select Payment Setup for Sage Exchange.

Payroll

Sage 100 Direct Deposit Service Processing

The following changes were made to the Process Employee Pre-Note and Direct Deposit Transactions window:

- The Select Sent button has been renamed Select Batches Previously Transmitted, and it is now at the bottom of the column of buttons.
- The Select Not Sent button has been renamed Select Batches Never Transmitted, and it has been moved to the top of the column of buttons.
- You will receive a warning message if you select a batch that has already been sent or has an effective date that has past.

Sage 100 2017.1

Sage 100 2017.1 includes program fixes. For a detailed list, please see the [release notes](#).

Sage 100 2017

The following enhancements were added in Sage 100 2017. Global changes are listed first, followed by module-specific changes.

Global Enhancements

NOTE

To activate the enhanced auto-complete feature, run the Build Search Index utility after upgrading to version 2017. Run the utility as new customer, vendor, and item records are created to see the records in auto-complete search results.

Enhanced Auto-Complete

When using the auto-complete feature, your search criteria is compared with all words within the searched fields. Previously the feature considered only the beginning of the text in the searched fields.

For example, if you have a customer named Allen's Appliance Repair and a customer named Appliance Services, typing Appl in the Customer No. field results in a list that includes both customers.

In addition, the number of fields included in the search has been expanded. For example, to search for a vendor by phone number, start typing the phone number, digits only, in the Vendor No. field.

After adding new records, you'll need to run the Build Search Index utility on the Library Master Utilities menu to index those records so that they appear in the auto-complete search.

For more information on this feature, see *Auto-Complete Search* in the help.

Build Search Index Utility

To activate the enhanced auto-complete feature, run the Build Search Index utility on the Library Master Utilities menu. If you do not run the utility, auto-complete will work as it did before this update.

Run the utility after creating new customer, vendor, and item records so that the records are indexed and appear in the auto-complete results. Running the utility updates the index for all of your companies.

You can use Task Scheduler to automatically run the indexing utility on a regular basis.

Full Text Search Option in Lookup Windows

A Full Text option has been added to the Search list in Lookup windows. When you select Full Text, your search criteria is compared with the data in all columns available in the Lookup window.

Note that your search criteria must match the beginning of a word. For example, if you have a customer named Hydromart and a customer named Martin Supply, when you type Mart, Martin Supply will appear in the search results, but Hydromart will not.

Search for Empty Fields in Lookup Windows

You can now search for fields that do not contain any value in Lookup windows. After selecting a field from the Search list, select Is Empty from the operand list, and then click Find.

Maintain Commodity Codes for Miscellaneous and Inventory Items

You can now maintain a list of commodity codes and associate them with miscellaneous and inventory items. Commodity codes are included with the data sent when processing Level 3 credit card transactions in the Sales Order module.

- Commodity Code Maintenance has been added to the Common Information Setup menu. Use this task to maintain a list of commodity codes and their descriptions. The codes and descriptions are available in the lookup views for Commodity Code fields. You can click the Apply button to assign a commodity code to a range of items.
- The Commodity Code Import Wizard, available on the Common Information Utilities menu, guides you through importing commodity codes from tab-delimited text files.
- A Commodity Code field has been added to the Main tab in Miscellaneous Item Maintenance and the Additional tab in Item Maintenance. You can enter an existing code or create a new one on the fly.
- A Commodity Code field has been added to the Main tab in Product Line Maintenance. A Commodity Code check box has been added to the Apply Product Line Information window so that you can apply the code entered in Product Line Maintenance to the selected inventory items within the product line.
- When an item is selected in Sales Order Entry and S/O Invoice Data Entry, the code entered in the item's maintenance task is the default value in the Commodity Code field, but it can be changed.
- A new Commodity Desc field displays the commodity code description in Sales Order Entry and S/O Invoice Data Entry.



NOTE

The Commodity Code field appears in Sales Order Entry and S/O Invoice Data Entry only if a credit card set up for Level 3 processing is selected as the payment method.

Prior and Next Buttons for Calendar Window

Prior and Next buttons have been added to the Calendar window. You can use the buttons to quickly change from month to month.

Resizable Memo Maintenance Window

You can now resize the Memo Maintenance window by dragging the lower-right corner of the window.

Ability to Suppress "Remove Forms" Message

A module option in Role Maintenance allows you to suppress the message that reminds you to replace forms with paper after printing.

To no longer see this message, clear the Show Prompt to Remove Forms From Printer check box in the Common Information section.

Larger Font for Selected Reports

The font size used for selected reports has been increased to improve readability. These reports previously used a 6 point font. The new font is horizontally equivalent to the previous font, but it is 30 to 40 percent taller.

Cancel Button Available When Printing Reports

You can now cancel report printing by clicking the Cancel button on the message window that appears while the report is processing. Note that clicking the Cancel button will cause the report's task window to close, even if you have selected the Keep Open After Print check box.

New Options on Help Ribbon

Several buttons have been added to the Help ribbon on the standard Desktop. The new options include the ability to:

- Access the Sage 100 knowledgebase
- Start a chat session with Sage 100 tech support
- Create a support ticket

You must log in to use some of these features.

Accounts Receivable

Ability to Accept ACH Payments

You can now enter ACH payments in the following tasks:

- A/R Invoice Data Entry
- Cash Receipts Entry
- Repetitive Invoice Entry

To enable this feature, you must have a Sage Payment Solutions account that is set up for ACH payments. You can then enable the feature on the Payments tab in Company Maintenance and set up ACH payment types in Payment Type Maintenance. For more information, see *Set Up Credit Card and ACH Payment Processing* in the help.

To accommodate this feature, some tasks, fields, and tabs have been renamed to reference "payments" instead of "credit cards." Details are in the following sections.

ACH Payment Processing

ACH payments are submitted to Sage Payment Solutions as part of the Cash Receipts Journal and A/R Sales Journal update process. They cannot be processed individually. For more information, see *Process ACH Payment Transactions* in the help.

Data Entry Tasks

The following changes were made in the data entry tasks.

- The Credit Card tab has been renamed; it is now the Payment tab. Fields related to ACH payments have been added, and the Payment ID field has replaced the Card ID field.
- On the Payment tab, the Fix button is available based on the Allow to Override ACH Payment Transaction security event in Role Maintenance.
- ACH payment related fields have been added to the Cash Receipts Deposit window and the Cash Receipts Entry Header tab.

Maintenance Tasks

The following changes were made in maintenance tasks:

- In Payment Type Maintenance, you can now select ACH Payment as the payment method.
- On the Customer Maintenance Additional tab, the Payment ID field has replaced the Card ID field. ACH payment-related fields have been added.
- On the Customer Maintenance Invoices and Transactions tabs, ACH payments now appear in the secondary grid.
- The Customer Credit Card Maintenance window has been renamed Customer Credit Card and ACH Payment Maintenance. ACH payment-related fields have been added to the window.
- In Invoice History Inquiry, an ACH account field displays the last four digits of the ACH payment bank account for invoices with ACH payments. A Payment Information button has replaced the Credit Card Information button. The button opens the new Payment Information window to view additional details about the payment.
- See Company Maintenance Changes for ACH Payments on page 6 in the Library Master section for information about that task.

Reports and Listings

- The option to print customers' ACH payment information has been added to the Customer Listing task window. The last four digits of the bank account appear on the listing.
- On the Deposit Transaction Report, the last four digits of the bank account appear for ACH payments in the renamed Credit Card/ACH/Reference/Check Number column.
- The Credit Card Settlement Report has been renamed Credit Card and ACH Settlement Report. ACH payments are included on the report.

Changing Transaction Information

A new security event, Allow to Override ACH Payment Transactions, has been added. This security event enables the Fix button on the Payments tab in A/R Invoice Data Entry and Cash Receipts Entry, which lets users update ACH payment transaction information.

Bank Reconciliation

Option to Keep Bank Reconciliation Report Window Open

The following check boxes have been added to the Bank Reconciliation Report task window:

- Keep Window Open After Print

- Keep Window Open After Preview

Note that the task window will automatically close when updating the report, even if the check boxes are selected.

Improved Export to Excel for Reports

When exporting Bank Reconciliation reports to Microsoft Excel, the resulting Excel file is easier to view and manipulate.

- The minimum font size is 8 points.
- Empty columns and rows are minimized.

Customer Relationship Management

Sage CRM 7.3 SP3 is now included with Sage 100. For information on what's new in this version, see *Sage CRM 7.3 SP3 Release Notes*. This document is available in the Documentation folder within the Sage CRM installation program. To access this guide, click the Documentation link on the Autorun screen that appears when you start the Sage CRM installation program.

General Ledger

Improved Export to Excel for Financial Reports

When exporting financial reports to Microsoft Excel, the resulting Excel file is easier to view and manipulate.

- The minimum font size is 8 points.
- Empty columns and rows are minimized.

Library Master

Search Added to Role Maintenance

After selecting a role in Role Maintenance, you can click the Search button and enter search criteria. A list of matching tasks, security events, and module options appears, and you can select one to go to its location on the applicable tab.

Company Maintenance Changes for ACH Payments

The following changes were made to support the ACH payment processing feature.

- The Credit Card tab has been replaced with the Payment tab.
- The Enable Credit Card Processing check box has been replaced with the Enable Payments field. You can select whether to accept credit cards, ACH payments, both payment types, or neither option.

Sales Order

Ability to Accept ACH Payments

You can now enter ACH payments in the following tasks:

- Sales Order Entry
- S/O Invoice Data Entry

To enable this feature, you must have a Sage Payment Solutions account that is set up for ACH payments. You can then enable the feature on the Payments tab in Company Maintenance and set up ACH payment types in Payment Type Maintenance. For more information, see *Set Up Credit Card and ACH Payment Processing* in the help.

To accommodate this feature, the following changes were made in the data entry tasks.

- The Credit Card tab has been renamed; it is now the Payment tab. Fields related to ACH payments have been added, and the Payment ID field has replaced the Card ID field.
- On the Payment tab in Invoice Data Entry, the Fix button is available based on the Allow to Override ACH Payment Transaction security event in Role Maintenance.

ACH Payment Processing

ACH payments are submitted to Sage Payment Solutions as part of the Sales Journal update process. They cannot be processed individually. For more information, see *Process ACH Payment Transactions* in the help.

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