

# Sage 100 2023

## What's **New**?

### The Information Center Page:

This is the all-new information page that has been added in order to offer dynamic content and further announcements for the user.

### Recent Tab Added to the Ribbon

The latest version of the ribbon comprises the all-cool 'recent tabs' that displays the tasks that have been accessed recently from the file menu, home tab, web content, tab, and the module tab. The recent tab can also be hidden by simply right-clicking on the ribbon, thus, clearing away the 'show recent' within the ribbon.

### Expanded Tool Tips

The expanded tool tip comprises the 'tasks' that are located. For instance, simply hovering over the company maintenance displays the tooltip located in the library master main menu.

### The Active Tab on the Ribbon Persists

After exiting sage 100, the last tab accessed on the ribbon persists. For instance, if you have used the favorite tab as the last tab, as and when you exited the sage 100 then it will remain the active tab even the next time you log in.

### The Global Changes

Here are a few specific, yet important 'global changes that have been carried out through multiple modules:

## The Installation Simplification

This is perhaps one of the best aspects of the sage 100, 2023 version, where the software has been consolidated into a single product with three installation approaches. Here the options to install sage 100 standard, sage 100 advanced, and sage 100 premium have been removed. Instead, the users will now have the option to select the architecture that can be used, i.E. Stand-alone or lan or client/server. Once you select the client/ server architecture, the user can go on to select the database to use

## ProvideX or Microsoft SQL Server

The other installation changes have also taken place:

- Within the sage 100 integration engine service screen, you will be able to notice the 'skip' option. In case you do not want to integrate sage 100 with sage crm, you can easily click skip to bypass the process of configuration of the integration engine.
- Within the productivity applications screen, an all-new configure sage 100 integration engine has been added.

## Select Serial Numbers by Range

This is the latest option that has been added to the lot/serial number distribution. Now, you can easily select the serial numbers with the help of the range instead of having to scroll through a list to find the starting and ending numbers. The enhancement has been carried out throughout the following modules:

- Bill of Materials
- Inventory Management
- Purchase Order
- Production Management
- Return Merchandise Authorization
- Sales Order

## The Default Years to History

This is the module option task where the users can specify the years required to save the History. This default setting is fixed to nine years. However, the minimum years required to retain the history has not been changed, and the update will not affect the existing settings.

## The Activity Log Updates

The activity log gets updated with a list of inactive vendors and customers removed once the accounts payable remove inactive vendors utility and the accounts receivable remove inactive customers utility are run.

## Image Viewer

The image viewer in item maintenance and miscellaneous item maintenance has been updated in order to allow the users to be able to delete any specific image when they have a certain security setup requirement to take care of. This 'delete feature' is available according to the latest security option within the role maintenance, **'allow user to delete image files with the image viewer'**.

## iShip Replacement

The iship replacement tool has also been replaced. Within the data entry task, when you need to click the 'track' option the tracking id will be used to be able to determine the carrier that the package belongs to. Also, you will be redirected to the required website. Usps, ups, fedex, dhl, and ontrack are the carriers handled automatically. In case the package id does not belong to any of these carriers, then the user will be redirected to the google search with the package id.

## SAP Crystal Report 2020

Now, you have the all-new 'version 2020' instead of the sap crystal report 2020. In this case, the crystal runtime components sp30 are the same as that in the sage 300, sage hrms, and sage fixed assets.

## Accounts Payable

Here is the list of changes that have been done within the accounts payable module:

### 1. Masked 1099 Vendor Taxpayer ID/Social Security Number

The masked 1099 vendor taxpayer id/social security number is now available as 'masked data' within the data entry tasks. These will also print 'masked' on the 'vendors list', balances and vendor listings, and also vendor mailing labels. However, these setups can only be viewed by the right kind of security setup, as this is sensitive information and also the access to the option unmasked taxpayer id/ssn check box. This check box is now available based on the new security option within the role maintenance, allow viewing, printing, and editing of highly sensitive 1099 information.

## The Masked ACH Bank Account and Routing Numbers

Now, within the data entry tasks, the vendor's electronic payment bank account and routing numbers are masked. This will also print masked within the vendor listing. Also, masked with the ach maintenance is the routing transit numbers. With this, only the users with the correct security setup will only be able to view the sensitive information and access the option that is termed as print unmasked ach information check box within the vendor listings. You can view the check box as it is available according to the new security option within the role maintenance, allow viewing, printing, and editing of highly sensitive ach information.

## Improvements Within the Invoice Payment Sections

Within the payment, windows presents the selected invoices along with the check box that has been added. This way the user will be able to select each invoice for the required payments.

### 1. The Vendor Maintenance

Within the vendor maintenance is present the additional tab for the payment windows. This allows the user to be able to quickly select any individual invoice for payment.

### 2. Development Studio

Here are some of the changes that have been made within the development studio:

#### Grid Definition Maintenance

Within the grid definition maintenance, you have presented the defining grid columns. This way you can now exclude the columns from being exported to excel. This is done by simply entering excel = no within the tag field.

### 1. Inventory Management

Here are the changes that have been done in the inventory management:

#### Option to Hide the Inactive Warehouse

Now, another checkbox has been added within the additional tab within the inventory management options. This allows the user to hide the inactive warehouses. One can find the show/hide inactive warehouses option in the following locations:

- Main Tab On Item Maintenance And Item Inquiry
- Quantity Tab On Item Maintenance And Item Inquiry

- Reorder Maintenance
- Item Quantity Inquiry

## Option to Show/Hide Zero Quantities for Lot/Serial Items

Now, you have the display zero quantities for lot/serial items within the cost detail check box which is present within the additional tab in the inventory management options. The user can select this check box to be able to display lot/serial items that include zero quantities within the cost details tab within the item maintenance and item inquiry.

## Remove Inactive Items Utility

This option has been added to the inventory management utilities menu. Once you run the utility, the activity log gets updated along with the list of the inactive items being removed.

## Inventory Requirements Planning Options

Here is the list of the specific changes that have been made within the Inventory Requirements Planning Module:

- Pull In Work Ticket check box
- Push Out Work Ticket check box
- Round Integer Unit of Measure check box
- Base Effective Date on Release Date of Demand check box
- Calculate Build Time for Make Items Using the field

## Inventory Requirements Planning

These are the fields that have been added, offering more options for the process of irp Generation:

- Effective Date field
- Include the Sales Quotes checkbox
- Explode Make Action field
- Create a Work Ticket with Materials From the field
- Default Lead Time (Days) field
- Default Build Time (Days) field
- Advanced Arrival Allowance (Days) field

In case the inventory requirement planning module does not get integrated with the production management or the purchase order, the user can now click the production or purchase to view the report of the inventory demand.

## Expanded Summary and Detail Information

Within the items to produce and the items to purchase, the user can now avail the option to view the summary details for the items with pending actions. The item details now display the recommended actions, the action date, and also the required date in order to meet the demand for each detailed record.

## Schedule IRP Generation with Task Scheduler

Now it is possible for the users to also schedule the irp generation process with the library master task scheduler. This offers the user the flexibility to run the generation after business hours or also overnight.

## Inventory Requirements Planning Inquiry

In the inquiries menu is also added the inventory requirement planning inquiry. This task can be used to view the purchase or also production information for a certain item that has been based on the last completed irp generation process.

## The Reports Menu

Now, you have an all-cool reports menu that also comprises the following reports: action by vendor report, inventory requirements planning report, projected demands report, and work ticket and sales order demand.

### 1. Action by Vendor Report

This comprises the ability to select using the warehouse code and later print the warehouse code within the report. Within the reports is also available the standard units of measurements.

### 2. The Project Demand Reports

Following are the changes that have been made in the project demand reports:

- A fiscal/calendar year option has been added, enabling you to print the report for a selected year.
- When the consolidate customers check box is selected if item projected demands are included in the consolidation, the qty sold column on the report displays the items total quantity sold. If item projected demands are not included in the consolidation, the qty sold column displays the sum of the consolidated customers quantity sold.

## Library Master

Here is the list of changes that have been made in the library master:

### 1. Option to Suppress Expired Messages

Within the user, maintenance is available in the suppress expire messages check box that allows the user to suppress displaying the expired license messages by the user.

### 2. Retain Last Path in Data File Display and Maintenance

Once you go to the data file display and maintenance and click on the 'folder' button, you will be able to see the folder location of the last file viewed within the select file window.

## Paperless Office

Here is the list of the changes made in the paperless office:

## Updated Printer Driver

With the latest amyuni pdf converter, the virtual printer driver has been used to create pdf documents. It has been updated to the 6.5.1.7 version

## Production Management

Here is the list of changes that have been made in the production management module:

### 1. The Enhanced Scheduling

The production management module now comprises the enhanced scheduling feature as well. This is for the user to be able to get better flexibility and functionality.

### 2. The Production Management Options Schedule tab

The following new options have been added to the management options schedule tab:

- Now you have the Maximum Number of Months added to the Schedule field as well.
- The user can also define the Default work center closure that can be used for all work centers.

## Activity Code Maintenance

The latest in the activity code comprises some of the following enhanced scheduling fields. These include:

- ✓ Calculation Methods
- ✓ Ignore Queue Time

## Work Ticket Template Maintenance

These are the enhanced scheduling fields that have been added to the work ticket template maintenance, these are:

- ✓ Calculation Method
- ✓ Hours Per Activity / Activities per Hour / Number of Hours
- ✓ Overlap Percent
- ✓ Ignore Queue Time

## The Work Center Maintenance

These are the changes that have been made within the work center maintenance:

- ✓ The enhanced scheduling fields: this comprises the queue time/hours, efficiency percent, number of workers or machines, and minimum scheduling time period-minutes.
- ✓ The users can set up the number of hours that a work center is available for operation every day of the week for the available hours field.
- ✓ One can also set up the closures for specific centers.
- ✓ When you need to create a new copy form, you can do so by clicking on 'copy' from the existing work center.
- ✓ One can easily click on apply to copy available hours and closures from the existing work center over to one or more work centers.
- ✓ The user can utilize the memo option to view, create and maintain the memo.

## Work Ticket Entry

Within the work ticket entry, here are the changes that have been created for better Scheduling:

- ✓ Within the schedule tab, the schedule option is now added to be able to access the new schedule work window.
- ✓ The schedule work window itself can be used to select both forward and backward scheduling methods to determine when a certain step of the work ticket has been started and the duration that every step takes to complete.



- ✓ The application of forward scheduling in order to enter the start date of the work ticket, along with the scheduling process will be able to calculate the due date for the work ticket.
- ✓ The application of backward scheduling in order to enter the due date for a work ticket, and the scheduling process will be able to calculate when the work ticket will be released to the work center, to be able for the work ticket on time.
- ✓ Within the schedule tab, a manually schedule checkbox has been added to offer the user the option to manually enter the production start date and production due date on the schedule tab and the steps tab.
- ✓ Within the steps tab, there are specific fields that have been added within the secondary grid, these are: ignore q time, overlap percent, prod queue date, sched method, scheduling hrs, scaling method, scaling factor, and extended time.

## Work Ticket History Inquiry

The user can now also view detailed step information within the work ticket history inquiry schedule tab by simply selecting a step within the list box and clicking on the additional information button.

## Work Center Capacity Inquiry

Work center capacity inquiry is the new addition to the inquiries menu. One can use this task to review commitments against work centers within three formats: daily, weekly, and detail.

## Scheduled Capacity Report

A scheduled capacity report has also been added to the reports menu. One can use this report to print commitments against work centers within three formats: daily, weekly, and detailed.

## Material Issue Workflow Improvements in Work Ticket Transaction Entry

Within work ticket transaction entry when the user is creating a materials transaction, they can now import available material lines with the remaining quantity in order to issue in bulk to the lines tab. This enhancement helps speed up data entry. The user has the option to select all the available material lines, or they can also use the new material selection window to be able to select specific material lines to issue. The material selection button has also been added within the work ticket transaction entry lines tab to open the material selection window.

## Lot/Serial History

An all-new lot/serial history button has been added in the following locations:

- ✓ L materials tab on work ticket history inquiry
- ✓ L inquiry tab on work ticket history inquiry for the materials and completions views
- ✓ L inquiry tab on work ticket entry for the materials and completions views

## Selections for Purging Work Ticket History

Within the purge work ticket history, selections have been added to allow the user to purge by work ticket number, release date, and close date.

## Work Ticket Template Maintenance

The user can now also add a scrap percentage for each item on the materials tab in work ticket template maintenance.

## Labor Entry

Within the labor entry if you're capturing punch in/out time for a certain employee and the payroll module has been integrated with production management, the user can now select a department worked in at the dept no. Field that is different from the employees assigned department in payroll employee maintenance. Once the user updates the payroll check register, the department worked in and its general ledger accounts will be used instead of the employees assigned department in payroll employee maintenance.

Once you update the payroll check register, the department worked in and its general ledger accounts will be utilized instead of the employees assigned department.

## Add Activity Codes and Work Centers on the Fly

The user can add on-the-fly activity codes and work centers in work ticket class maintenance, work ticket template maintenance, and work ticket entry with the appropriate security setup within the library master role maintenance.

## Option to Relieve WIP Based on Percent Complete

An all-new relieve wip based on percent complete check box has now been added to the work ticket entry header tab and the work ticket class maintenance main tab. The user can select this check box to utilize the prorated cost for wip when entering a partial completion in work ticket transaction entry.

## Explode Bill Subassemblies

With in the work ticket entry, the explode subassemblies check box has now been replaced by the explode bill subassemblies field. When the bill of materials module gets integrated with production management and enhanced scheduling are used, selecting yes at the explode the bill subassemblies field will create work ticket steps for each subassembly on a multilevel bill. This functionality was available within the work order module and has now been added to production management.

## Explode Template Subassemblies

With in work ticket entry, the explode template subassemblies field has also been added, to provide the ability to explode subassemblies defined on a work ticket template when enhanced scheduling is utilized.

## Recalculate Material Budgets

Within the materials tab in work ticket entry, the recalculate material budgets button has now been added, thus allowing the user to recalculate budgets for the step assigned to the selected material line. All the material detail lines assigned to the same step will now be recalculated.

The user will simply have to click the arrow next to the button, and then select recalculate material budgets all steps to recalculate budgets for all material lines and steps in the grid.

## Work Ticket Entry Copy Feature

Within the work ticket entry copy from the window, the production start date field has also been added to simplify the process of copying a manually scheduled work ticket. During the copy process, the system will now be able to calculate the number of days between the start date entered here and the source work ticket start date. The difference between the dates will now be used to automatically adjust all of the scheduling dates in the source work ticket steps as they are copied.

## Create a Work Ticket with Materials from Option

A brand-new option has also been added within production management options, enabling you to create a work ticket using the materials from the bill, work ticket template, both the bill and template, or you can select to be prompted with a message in work ticket entry asking which materials to use.

## Features No Longer Subscription Only

These are the features that were initially available only if you purchased sage 100 through a subscription plan. However, they are now available for all users, irrespective of whether sage 100 has been purchased as a subscription or perpetual license.

### Journal and Register Viewer:

Access to the paperless office journal and register viewers are now available from various locations.

### Task Scheduler:

The user can email reports printed from a task scheduler job.

## Data File Display and Maintenance Enhancements:

The user can now select a subset of fields from the table to be displayed. Once selected, one can define filters and apply them to one or more of the fields to limit the rows displayed in the key scan screen. The status text on the key scan screen will indicate when a filter is active.

## Map Service:

Another option has also been added to the preferences tab in user maintenance allows the user to select which map service to use when clicking the map button in sage 100 tasks. Use google maps, bing maps, or mapquest.

