# Sage 100 2016 – What's New

## Global Enhancements

### New Product Key Required

If you use the Payroll module, you must enter your new product key when installing Sage 100 2016. If you enter a product key obtained when purchasing a previous version of the program, you will not be able to open any Payroll tasks.

### New User Interface

A new user interface is available as a benefit of Sage 100 modernization subscription business case bundles. This user interface has been updated with new features and a more modern appearance. The following is a list of highlights.

For more details, refer to the Sage 100 *Getting Started Guide*, which you can access form the Resources page: On the Sage 100 Desktop, click Web Content, and then click Resources.

### Ribbon Replaces the Toolbar

A ribbon has replaced the Desktop toolbar. You still have access to the same features, but the new interface makes them easier to find.

### Change Font Size for Desktop and Task Windows

You can now increase the size of text that appears in the Desktop and task windows. The task windows will be automatically resized to accommodate the text size. Use the Application Scaling menu on the View tab to adjust the text size.

### Themes for the Desktop and Task Windows

You can now select from one of several themes for the Desktop. Use the View tab to select a theme.

Different themes are also available for task windows. You can select a preconfigured theme or create your own. For more information, see **Theme Tab in Company Maintenance**.

Individuals can select their own themes on the new User Settings window if they have the appropriate security setup.

### Extended Item Descriptions for All Items

You can now enter an extended item description for all items, with the exception of Comment-type items. The following changes have been made as part of this enhancement:

- An Extended Item Description button has been added to the Miscellaneous Item Maintenance window. Click this button to open the Item Text Maintenance window to view and maintain extended item descriptions.

- A Print Extended Descriptions check box has been added to the Miscellaneous Item Listing window.

- An Extended Item Description button has been added to the Lines tab in A/R Invoice Data Entry and A/R Repetitive Invoice Entry.

- On all other data entry screens with an Extended Item Description button, the button will now be available when miscellaneous, special, and charge items are selected.

## User Settings Window

The new User Settings window allows users to set certain preferences, such as the default zoom level for previewing reports and whether a decimal point is automatically inserted when entering quantities.

Users can also use this window to select whether they want to use the standard or classic Desktop and, if they have the appropriate security setup, a theme for task windows. A new security event, Allow to Modify Theme in User Settings, has been added to Role Maintenance. For more information on selecting a Desktop or theme, see **New User Interface**.

The User Settings window is accessed by clicking the Settings button on the User Logon window after entering a valid user logon ID and password, or by selecting Change User Settings from the Sage 100 File menu.

## Expanded Customer Purchase Order Field

The customer purchase order number field has been expanded to 30 characters. The field held a maximum of 15 characters in prior versions.

- The standard forms and reports handle the expanded field differently, depending on the report layout. If the longer number doesn't fit on one line, it wraps to the next.

- Test all customized forms that print the customer purchase order number to ensure that they correctly display numbers that exceed 15 characters.

- Reports created with the Business Insights Reporter Wizard must be modified by editing the report using SAP Crystal Reports Designer, or you can recreate the reports using the wizard.

- Windows and tabs that display the customer purchase order number have been updated to display either all 30 characters or as many as possible. For fields that do not display all 30 characters, you can use the Right Arrow key or the End key to move the cursor within the field and view the full number. The Home key returns the cursor to the beginning of the field.

## New Fields Added to History Tables

For internal control purposes, the following fields have been added to various tables:

- Created By (UserCreatedKey)
- Date Created (DateCreated)
- Time Created (TimeCreated)

The fields were added to the following tables:

- AP_CheckDetailPosting
- AP_CheckHeaderPosting
- AP_CheckHistoryHeader
- AP_InvoiceHeaderPosting
- AP_InvoiceHistoryHeader
- AP_OpenInvoice
- AR_CashReceiptsHistory
- AR_InvoiceHistoryHeader
- AR_OpenInvoice
- AR_TransactionPosting
- PO_ReceiptHistoryHeader
- RA_ReceiptsHistoryHeader

The data in these fields can be viewed using a Visual Integrator export or a custom report. In history inquiry tasks, you can right-click the task window and then click System Info to view the Created By and Date Created information.

## Transfer Document to a Different Batch

A Transfer Document button has been added to data entry windows that include the batch entry feature. If batch entry is enabled, you can click this button to move the current document to a different batch.

# Accounts Payable Enhancements

## Electronic Payment Vendor Option for Aged Invoice Report

An Include Electronic Payment Vendors field has been added to the Accounts Payable Aged Invoice Report window. You can use this field to specify whether vendors with the Electronic Payment check box selected in Vendor Maintenance are included on the report. The available options in the field are No, Only, and Yes.

## Larger Font Size Option for Aged Invoice Report

A Print Condensed check box has been added to the Accounts Payable Aged Invoice Report window. When the check box is cleared, the report will be printed in landscape view with an 8 point font size. When this check box is selected, the report will be printed in portrait view with a 6 point font size as it was previously.

## New Vendor Maintenance Fields for 1099 Reporting

Two check boxes used for 1099 reporting have been added to the Additional tab in Vendor Maintenance:

- Electronic Consent Signed: Select this check box if the vendor has provided consent to receive an electronic 1099 form instead of a paper copy.

- FATCA: Select this check box if you are required to report payments to this vendor according to the Foreign Account Tax Compliance Act.

# Accounts Receivable Enhancements

## Reference Memos in Repetitive Invoice Entry

A Memo button has been added next to the Reference field in Repetitive Invoice Entry. When using the Copy From button to copy information to a new repetitive invoice, you will have the option to copy any existing memos.

## Larger Font Size Option for Aged Invoice Report

A Print Condensed check box has been added to the Accounts Receivable Aged Invoice Report window. When the check box is cleared, the report will be printed in landscape view with an 8 point font size. When this check box is selected, the report will be printed in portrait view with a 6 point font size as it was previously.

# General Ledger

## Sage Payroll Services Integration

Sage 100 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 http://na.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.

# Library Master

## Expanded SMTP (Email) Server Password Field

The SMTP (email) server Password field in Company Maintenance has been expanded to 128 characters. The field held a maximum of 14 characters in prior versions.

Due to the space limitations, the data entry field displays 59 characters. As you type a password that exceeds 59 characters, you'll automatically scroll through the field as needed.

## Theme Tab in Company Maintenance

A Theme tab has been added to Company Maintenance. Use this tab to choose a theme for the selected company. If you select the Classic theme, you can specify a company-specific background color for the window background, frame, or both.

The Enable Company Specific Background Color field and Select Color button have been relocated from the Preferences tab to this tab. The Select Color button is now identified by an image of a color palette instead of a textual label.

The new theme options are part of the updated user interface, which is available as a benefit of Sage 100 modernization subscription business case bundles.

For more information on user interface-related changes in version 2016.

## New Task Scheduler Options

You can now schedule the following tasks in Task Scheduler:

- Print reports
- Run Visual Integrator import and export jobs

As part of this change, a Type field has been added to the Schedule tab. The grid on the Task tab will vary based on what type is selected in this field.

# Payroll

## Sage 100 Direct Deposit Service

Sage 100 Direct Deposit, a new product offered through Sage Payroll Services, is now available as part of the Payroll module. This new 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.

For setup instructions, see Setting Up Sage 100 Direct Deposit Service in the help or refer to the Sage 100 Direct Deposit User Guide available here: **https://cdn.na.sage.com/docs/en/customer/100erp/2016/open/Sage100_DirectDeposit_GettingStartedGuide.pdf**

As part of this change, the Direct Deposit Interface options available in Payroll Options have changed.

- Sage 100 Direct Deposit Service has been added.

- The Sage option, which was used for the preexisting direct deposit feature, has been renamed Manually Send ACH File.

## 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 4980H Transition Relief
- 98% Offer Method

# Sales Order

## Default Expiration Date for Quotes

A Default Days Until Quote Expires field has been added to the Entry tab in Sales Order Options. The value entered in this field will be added to the Sales Order accounting date to calculate the expiration date for quotes in Sales Order Entry.

## Additional Options When Promoting Quotes

In addition to promoting quotes to standard orders in Sales Order Entry, you can now promote them to back orders, master orders, and repeating orders.

## Use Default Order Date When Promoting Quotes

The following check box has been added to the Entry tab in Sales Order Options: Use Default Order Date When Promoting to Order

If you select this check box, the original quote date is replaced with the order date from the Default Values for Sales Order Entry window when you promote a quote to an order. If the check box is cleared, the original quote date is used for the order date, as it was in past versions.

## Expanded Check Number Field

The Check Number field in Sales Order Entry and Invoice Data Entry has been expanded to 10 characters. Only 6 characters could be entered in the field in prior versions.