

# Sage 100 2024

## What's New Guide

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# What's New in Version 2024

This document describes the enhancements added in Sage 100 version 2024. Changes to the Sage 100 Desktop are listed first, followed by global changes and then module-specific changes.

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

## Sage 100 Desktop Changes

The following changes were made to the Sage 100 Desktop.

### Resources Button

On the Help tab, the Resources button has been added to provide a one-stop shop to the Sage Community Hub, Knowledgebase, Product Documents page, Sage University, and additional services.

The following buttons have been removed on the Help tab: Product Documents, Knowledgebase, Downloads and Updates, Online Community, Sage University, and Order Checks and Forms.

### Information Center Page Updates

The Sage 100 Information Center page has updated links to the Resource Center, Product Documents page, and more.

## Global Changes

The following changes are carried throughout multiple modules.

### Installation Change

The Sage 100 installation program now detects if a computer is running the 64-bit version or 32-bit version of Windows, and defaults the bit version of the Sage 100 install accordingly.

For example, if you're installing Sage 100 2024 on a computer running the 64-bit version of Windows, the installation program defaults to install the 64-bit version of Sage 100 but can be changed. If you have other 32-bit versions of Sage 100 on your system, we recommend installing the 32-bit version of Sage 100. For information on how to convert to the 64-bit version of Sage 100, see the Upgrade Guide on the [Sage 100 Documents page](#).


### Demo Data Refresh (Phase 1)

Inventory items and descriptions in Sage 100 demo data have been updated to use current industry terms.

### Automatic Display of Full Extended Item Description

In Role Maintenance, the Inventory Management security option, **Allow Automatic Display of Full Extended Item Description When Not in a Grid**, has been renamed **Allow Automatic Display of Full Extended Item Description**.

In addition to suppressing the automatic display of the extended item description in Item Maintenance, you can now also suppress it in data entry tasks when the item description is in the primary grid and an item is entered on a new line in the grid or when tabbing past the item on an existing line.

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

## Improvements to Delete and Change Utilities

The following changes have been made in Accounts Payable Delete and Change Vendors, Accounts Receivable Delete and Change Customers, and Inventory Management Delete and Change Items:

- You can now access and enter information when data entry is in progress or the main entity task is in use. For example, you can access Delete and Change Vendors when invoice entry is in progress or when Vendor Maintenance is in use.
- File checking occurs upon clicking the Proceed button. For example, the delete and change vendor process can be performed only if tasks associated with the Vendor table are not in use and all data entry in progress has been posted.
- Tab order has changed. The Change tab is first, followed by the Delete tab.
- The vendor name, customer name, or item description now displays for starting and ending codes in each utility.
- New security options in Role Maintenance enable you to determine which users can perform the delete or change processes.

Also, the following changes apply to General Ledger Change Accounts:

- You can now access and enter information when data entry is in progress or the main entity task is in use.
- File checking occurs upon clicking the Proceed button. The change process can be performed only if tasks associated with the Accounts table are not in use and all data entry in progress has been posted.




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

## Improved Audit Tracking

Data tracked and printed on the audit trail has been expanded for vendors, customers, employees, and items. This enhancement provides improved security compliance in the Accounts Payable, Accounts Receivable, Payroll, and Inventory Management modules, and includes the following changes:

**Note:** Improved audit tracking for the Payroll module is available only if Sage 100 Payroll 2.24.1 is installed on Sage 100 2024.

- Changes, deletions, and additions are now tracked for all data related to the main entity.
- A Purge button has been added to the audit report for each module, providing access to the new Purge Audit Report utility. You can also access the utility on the Utilities menu.
  - Task security is now used in Role Maintenance to determine access to the Purge Audit Report utility. Previously, security options determined access to the purge audit feature.
  - In the Payroll module, a Purge button has also been added to the Pay Rate Change Report that tracks employee pay rate changes.
- A new Audit Viewer selection has been added to the More button in Vendor Maintenance, Customer Maintenance, Employee Maintenance, and Item Maintenance. This selection is available if the user has permissions to the audit report for the module in Role Maintenance.
- In module options tasks in which you can specify changes to track for audit history, the default setting is now **All** when a new company is set up. Previously, the default was **None**.

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

## Print Audit Reports Anytime

Audit reports in the Accounts Payable, Accounts Receivable, Payroll, and Inventory Management modules can now be printed when the main entity is in use.

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

## ALE Lookups

The search value will no longer be cleared when the operand is changed.

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## Accounts Payable

The following changes were made in the Accounts Payable module.

### Vendor Date Established


On the Statistics tab in Vendor Maintenance and Vendor Inquiry, the Date Established field has been added to show the system date the vendor was created on. You can edit this field with the appropriate security setup.

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### 1099 Form fields for Vendor

On the Vendor Maintenance Additional tab, the following changes have been made for 1099 Form fields:

- The W-9 Form on File check box has been added, enabling you to track W-9 Forms for a vendor.
- You can now retain the taxpayer ID/Social Security number for non-1099 vendors. If Business or Individual is selected at the Vendor Type field, select the new option "None" at the Default Form field, and then enter the taxpayer ID number or Social Security number for the non-1099 vendor.

 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.



# Inventory Management


The following changes were made in the Inventory Management module.

## Delete Warehouses and Change Warehouses Utilities

Two new tasks, Delete Warehouses and Change Warehouses, have been added to the Inventory Management Utilities menu. Designed as separate tasks, these utilities feature task security and the following functionality:

- Use Delete Warehouses to delete existing warehouse codes from your company data files. Deleting warehouses is necessary when virtual warehouses for scrap, returns, and multi-bin are no longer needed, or when a physical warehouse location closes.
- Use Change Warehouses to renumber or merge existing warehouse codes in your company data files.

Both utilities feature the flexibility to access and enter information when data entry is in progress or the main entity task is in use. File checking occurs upon clicking the Proceed button.

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

## Switch Views in Lot/Serial Inquiry

The Switch View button has been added in the Lot/Serial Inquiry window. Click this button to switch the view of columns displayed in the Lot/Serial Inquiry list box. The last view selected persists by user.

**Note:** This feature is available if you purchased Sage 100 through a subscription plan.

# Inventory Requirements Planning

The following change was made in the Inventory Requirements Planning module.

## Regenerate IRP Data

**Important!** If you're upgrading from Sage 100 2023.2 or earlier, you must regenerate your IRP data file to apply the latest schema changes and fixes. Improvements have been made to correctly link components back to parent items, particularly when the same subassembly appears on a bill of material multiple times.


## Library Master

The following changes were made in the Library Master module.

### Restricted Mode for Administrator Tasks

A new option to turn on Restricted mode has been added in the Administrative Tools screen, allowing you to limit the users that can log in to Sage 100 when Administrative tasks (such as testing modifications or adding user-defined fields) are performed.

You determine which users can log in with the new Role Maintenance security option, **Allow Access During Restricted Mode**. Turning on Restricted mode will not force users currently logged in (without rights for Restricted mode) out of Sage 100. Instead when launching a new task, a message appears telling them to log out.

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

### Email Notification for Task Scheduler Jobs

In Task Scheduler, the Job Status Notification field has been added. You can send email notifications when jobs succeed or fail.

### Option to Process All Tasks

In Task Scheduler, the Process All Tasks check box has been added. This option provides you with the flexibility to process all tasks defined on the Tasks tab, even if one

or more tasks fail.

## **Field Order Changed in User Maintenance and User Settings**

The fields on the User Maintenance Preferences tab and in User Settings have been reorganized into groups of similar options.

## **Auto-Complete Search Index Automatically Updated**

The Enable Update Search Index check box has been added on the Preferences tab in System Configuration. Select this check box to automatically update the auto-complete search index in the ../MAS90/MAS\_System folder when changes are made to customer, employee, vendor, general ledger account, or item records.

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

## **Paperless Office**

The following changes were made in the Paperless Office module.

### **Report Setting in Report Viewer and Period End Report Viewer**

The Report Setting used to print a report or period-end report now displays in the viewer task, so you can easily identify reports without having to open individual PDFs.

### **Electronic Delivery Message Maintenance**

A new [ReportSetting] token has been added as a merge field in Electronic Delivery Message Maintenance, allowing you to include the Report Setting used to print the report to PDF in the subject line and body of an email.


### **Option to Display PDF After Printing Report**

The Display PDF After Printing check box has been added in the Paperless Office Selection window.

## View Detail in Results of Electronic Delivery


A Detail button has been added in the Results of Electronic Delivery window. Click it to view details about documents sent to customers and vendors, including the date and time the document was submitted and the status.

**Note:** This feature is available if you purchased Sage 100 through a subscription plan.

 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.


## Improvements in Error During Electronic Delivery

You can now resize the Error During Electronic Delivery window to view all information. Also, the Copy Error Status to Clipboard button has been added to provide a one-click copy of Error Status text to your computer clipboard.

 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.

## Option to Ignore All Errors in Setup

The Ignore All Errors check box has been added in the Form Maintenance window, allowing you to set the default for this option in Error During Electronic Delivery. Select this check box to suppress the Error During Electronic Delivery window from automatically displaying so that form printing tasks no longer have to be monitored for errors.

 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.

## Improvement in Viewer Tasks

In viewer tasks, the log record you've selected in the list box now persists after clicking a button on the side bar.

## Relink PDF Documents Utility

The Relink PDF Documents utility has been added to the Utilities menu available from the Run Program window. In the Sage 100 Desktop, select File > Run. In the Run Program window, enter \*utl at the Program field to open the Utilities menu.

Use this utility to update the PDF location reference in the Paperless Office log records for PDFs that were moved to a new server or folder using a method other than the Move button in viewer tasks. This provides a faster way to relink the Paperless Office log records than the Link Maintenance utility.

## Production Management

The following changes were made in the Production Management module.

### Activity Code List

An Activity Code List button has been added next to the Activity Code field in Activity Code Maintenance. Click this button to view a list of all activity codes.

### 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 2024.

### Include Materials From Option

The Include Materials From field has been added in Cost Roll-Up Register, enabling you to determine if materials from the bill, work ticket template, or both bill and template are included when calculating the cost of the bill.


## Purchase Order

The following changes were made in the Purchase Order module.

### Quick Close of Partially Received Purchase Orders

The Clear Back Order upon Accept check box has been added on the Lines tab in Receipt of Goods Entry, enabling you to easily close a partially received purchase order. Also, the Apply Purchase Orders button has been added next to the new check box, providing you with the flexibility to close any partially received purchase orders that have been applied to the primary order.

This feature is available based on the new security option in Role Maintenance, **Allow User to Clear Back-Ordered Quantity in Receipt of Goods Entry**.

 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.

### Received Status for Purchase Orders

A new order status of Received has been added. When purchase orders have been received but not invoiced, the order will now have a status of Received instead of Back Order to correctly reflect the state of the order.

You can print orders and reports based on the Received status for the following:

- Purchase Order Printing
- Open Purchase Order Report
- Open Orders by Item Report
- Open Orders by Job Report
- Purchase Order Recap
- Open Orders by Work Ticket
- Purchases Clearing in Open PO Format
- Open Purchase Order Work Ticket Report (Production Management report)

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## Return Merchandise Authorization

The following change was made in the Return Merchandise Authorization module.

### View Applied Sales Orders

If multiple sales orders have been applied to an invoice, you can now view the sales order number and related customer purchase order number in the following:


- In RMA Item Selection, the Sales Order No. and Customer PO columns have been added to the list box.
- In the Invoice List lookup (accessed by clicking the Lookup button in the Invoice No. field on the RMA Entry or RMA Receipts Entry Lines tab), "Multiple" appears in the Sales Order No. and Customer PO columns when more than one order has been applied to the invoice. Previously, only the primary sales order and customer PO were displayed.
- In the Invoice Lines List lookup (accessed by clicking the Lookup button in the Item Code field on the RMA Entry or RMA Receipts Entry Lines tab), the Sales Order No. and Customer PO columns have been added.

## Sales Order

The following changes were made in the Sales Order module.

### Option to Print Forms for Generated Back Orders

The Print Forms for Generated Back Orders field has been added on the Forms tab in Sales Order Options, enabling you to automatically reset the Print Order check box and Print Pick Sheets check box in Sales Order Entry for back orders created during the Sales Journal Update.

 **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 Display Ordered Quantity in Red

On the User Maintenance Preferences tab, an option has been added to display the ordered quantity in red text on the Lines tab in Sales Order Entry and S/O Invoice Entry when the quantity exceeds a specific value. In the S/O Ordered Qty in Red When field,

## Sales Order

you can select to display the ordered quantity in red text when it exceeds available quantity, when it exceeds quantity on hand, or when the available quantity is lower than the reorder point.



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