



# **Sage 100 Contractor 2024 (SQL)**

## **Version 26.1 Release Notes**

Canada and U.S. Editions

September 2024

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# Installation Notes

## Incompatible Windows versions

**Caution!** Windows versions older than Windows 10 and Windows Server 2016 are no longer supported. Do not install this update if you are using Windows 7, Windows 8, Windows 8.1, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, or an earlier version of Windows, or you will not be able to open Database Administration or Sage 100 Contractor.

## Compatibility with Sage Estimating

**Important!** Sage 100 Contractor version 26.1 is not compatible with Sage Estimating version 20.1 and earlier versions. If you integrate Sage 100 Contractor with Sage Estimating, do not install Sage 100 Contractor version 26.1 until you install Sage Estimating version 21.1, or later.

## Using an older version of SQL Server?

It is good practice not to delay important upgrades of your software, which help to keep your data secure and your computer performing efficiently.

When you log in to Database Administration after upgrading to version 26.1, if the program detects that your SQL Server instance is using an Express edition that is earlier than SQL Server 2019 Express, it will display a new **Upgrade SQL Server Instance** tab that invites you to upgrade your instance. For now, you can use version 26.1 without upgrading SQL server. However, you may need to upgrade before the next Sage 100 Contractor update.

As Microsoft makes future cumulative updates available, you can easily install them from this tab.

Using an older version of SQL Server?

**Note:** If you do not use an Express edition of Microsoft SQL Server, Database Administration does not display this tab automatically when you log in. However, you can display the tab to see which version of SQL Server your instance is using and which version of SQL Server we recommend that you use. (Select **Server Management > Upgrade SQL Server Instance.**) You can then install the recommended version, as needed.

# Update 2—September 2024 (Build 26.1.184)

This update includes tax updates for the U.S. edition and some fixes, which are described in the following sections.

## U.S. Payroll Tax Tables

Payroll tax tables have changed for the following jurisdictions:

- Arkansas
- Kansas

## Fixes in this update

- In the **5-5-1 Daily Payroll** window:
  - Negative hours entered for daily payroll are now displayed properly in the **Recap By Day** windows.
  - The **Payroll Totals by Job Recap** again includes a line for records not posted to a job (for example, sick and vacation time) if the record does not include **Equipment Repaired**. With this change, grand totals for this report now match the **Payroll Totals by Employee** grand totals.
- When you use the [**Browse**] button to locate a file to attach to a record, or when you save a report to file, the program once again points to the last location from which you attached or saved a file, by default.

## Fixes in this update

- In the **4-7-5 Credit Card Reconciliation** window, we fixed an issue that occurred when reconciling a Bank Feeds transaction that included a credit amount. These transactions included characters in the Charges column and distorted the statement balances. This issue no longer occurs.
- In the **4-7-7 Import Credit Card Transactions** window, you no longer receive an error message when you remove the last transaction line imported through Bank Feeds.

# Update 1—July 2024 (Build 26.1.172)

This update includes tax updates for the U.S. edition and some fixes, which are described in the following sections.

## U.S. Payroll Tax Tables—July 2024

Payroll tax tables have changed for the following jurisdictions:

- Georgia
- Idaho
- Ohio
- Utah

## Canadian Tax Table Changes—July 2024

No payroll tax changes that would take effect in July, 2024 were announced for Canada.

## Fixes in this update

### Fixes in Both Editions

Version 26.1 includes the following software fixes in both the U.S. and Canadian editions:

- In the **3-9 Unitary Billing** window, when the Balance Quantity is net zero, the Balance Amount is also zero.
- In the **6-4-1 Change Orders** window, you no longer receive the fatal error, "Value was either too large or too small for an Int32," when the program tries to enter the Next by Job default for the Change# field.

## Fixes in this update

- When creating timecards in the **5-5-1 Daily Payroll** and **5-6-5 Create Timecards** windows, you can again select more than 50 employees from the Employees pick list.

## Fixes for the U.S. Edition

The following issues were fixed specifically for the U.S. Edition of Sage 100 Contractor:

- The **5-2-7-41 Pay Statement** report now uses the correct report form.
- Taxable Medicare wages are again reported correctly on 941 forms, as well as on other forms (944, W-2, W-3, and Federal Tax Deposit) when there is an amount reported in box 5d for wages subject to Additional Medicare Tax. This issue arose in the initial version 26.1 release in May.

# U.S. Payroll Tax Tables—May 2024 (Build 26.1.154)

Payroll tax tables changed for the following jurisdictions:

- Virginia

# Enhancements in Version 26.1

This section describes the new features and enhancements you will find in version 26.1.

## We've been listening to you!

Sage thanks you for your product ideas! In version 26.1, we've incorporated the following top-ranked suggestions from the Sage Ideas site. Later sections in the Release Notes describe changes that require more detailed explanation.

### Database Administration

- You can now archive your accounting and payroll records at the same time, providing:
  - The fiscal year end is December 31.
  - You are archiving accounting and payroll records for the same year.

For more information, see the help for Database Administration.

Thank you for this suggestion, Jessica L.

### Accounts Payable

- The detail section in a new **4-3-7-21 ACH (or EFT) Payment Receipt** report form includes the ACH number, vendor account number, payment date, and deposit date. This information is sorted first by invoice date, and then by invoice number on each payment receipt.

Also, ACH (or EFT) payment receipts can print in alphabetical order, similar to vendor checks.

Thank you for this suggestion, Heidi H., Gretchen H., Gywl W., and Charlene D.

We've been listening to you!

## General Ledger

- In the **Positive Pay File Settings** window, on the **File Format** tab, if you select **Fixed Text File** as the file format, you can select a new **Format Amount without decimal** checkbox, a format required by some banks.

On the **Settings and options** tab, you can use 3-digit numbers for the Issued Indicator and the Void Indicator.

Thank you for these suggestions, Walt M. and Charlene D.

## Miscellaneous enhancements

- You can use a new **7-8 Generate Employee Email List** window to generate a list of selected employee email addresses that you can paste into an address field in your email program.

For more information, see [Generate a list of employee email addresses](#).

Thank you for this suggestion, Donna P.

## Generate a list of employee email addresses

Use the **7-8 Generate Employee Email List** window to generate a list of selected employee email addresses when you need to send the same email to many employees. Sage 100 Contractor selects employee email addresses based on criteria you specify and places the results, separated by semicolons, in your Windows clipboard.

**Note:** You need security access to 5-2-1 Employees to use this feature.

After you generate the list, you can simply paste the addresses into a message in your email program or a document in another program.

We've been listening to you!

**To generate a list of employee email addresses:**

1. From the **Preferred Email** list, select whether to use employees' Direct Deposit email or their General Information email as your preferred email address.
2. (Optional) Select the checkbox to use the other email address if your preferred email field is empty in an employee record.
3. In the **Criteria for selecting employees you want to email** section, for each field in the list that you want to use as selection criteria, do the following:
  - a. Select an option to evaluate the field in employee records.
  - b. In the adjacent text box, specify criteria that the records must meet to be included in the list of emails. Only employee records with values that meet the criteria are included in the selection of email addresses.

For exact matches, select **In List** for the comparison option, and then specify the exact value. For example, to include only employees that are on leave or on probation, set the **Status** option to **In List**, and then specify 2, 3.

- c. If you want to use different fields for selection criteria, select [**Change Criteria**] to open a separate window, where you can select different fields from the Employees table and apply criteria to them.

**Note:** Fields that contain prefilled values are part of the defined query. You cannot change these values unless you modify the query definition.

4. Select [**Continue**].
5. Select the email addresses you want to use at this time, and then select [**OK**].

6. Sage 100 Contractor places the results directly in your Windows clipboard.
7. Paste the resulting list from your clipboard into your email program or another program.

## Choose to use non-standard expense accounts in Payroll

As of version 26.1, Sage 100 Contractor prevents you from using non-standard expense accounts for payroll calculations by default. However, if your company needs more flexibility in designating expense accounts, you can override the default setting that requires direct expense accounts for payroll.

In the **5-3-1 Payroll Calculations** window, providing you are signed into Sage 100 Contractor as a company administrator, you can select the new **Allow Use of Non-Standard Expense Accounts** option from the **Options** menu.

**Important!** Sage recommends that you don't select this option because using it can result in some undesirable effects, such as misstating job costs or mismatching direct expenses and job costs.

Not selecting this option ensures that you select valid expense accounts for the following accounts:

- Job Expense must be a direct expense account
- Shop Expense must be an equipment or shop expense account
- Overhead Expense cannot be a direct expense, shop, or equipment account
- Admin Expense cannot be a direct expense, shop, or equipment account

## Other improvements

Version 26.1 also includes the following improvements:

- The **About** window in Sage 100 Contractor includes a new System Info link that you can select to display information about your system in Notepad. (CON100-38160)
- Sage Construction Management is now integrated with Sage 100 Contractor.
- In the **1-3 Journal Transactions** window, we added 2 new built-in queries to show you cleared bank or credit card transactions:
  - Bank Reconciliation Cleared Transactions
  - Credit Card Reconciliation Cleared Transactions

If the beginning balance of your current reconciliation doesn't match the ending balance of your previous reconciliation, you can use these queries to compare the cleared transactions on your bank or credit card statement with the cleared transactions in your company data to verify that they match.

- A new help topic describes how to create revenue and expense budgets for General Ledger accounts.
- If you use Sage 100 Contractor with SQL Server Express 2014, when you sign into Database Administration after this update, the program notifies you that SQL Server 2014 is approaching its end-of-life (meaning that Microsoft will no longer provide support or security updates) and recommends that you upgrade your SQL Server instance.

## Enhancements for the U.S. Edition

Sage 100 Contractor Version 26.1 includes the following enhancements specifically for the U.S. Edition:

- We added support for the **Vermont Child Care Contribution Tax (VT CCC)**. For steps on setting up a calculation for the VT CCC, refer to the help topic "Vermont State Tax."

Do you have a product idea you want to share with us?

# Do you have a product idea you want to share with us?

We want to hear it!

To suggest a product enhancement when you're working with Sage 100 Contractor:

1. On the Sage 100 Contractor desktop, click the **Home & Resources** tab > **Submit Product Idea**.
2. Log in to the Sage 100 Contractor Ideas site (or sign up).
3. Describe your idea.
4. (optional) Browse through others' suggestions, and vote for the ones you love!

Or visit <https://www5.v1ideas.com/TheSageGroupplc/Sage100Contractor> any time you're online!

# Fixes in Version 26.1

## Fixes in Both Editions

Version 26.1 includes the following software fixes in both the U.S. and Canadian editions:

### Database Administration

- We fixed an issue that interfered with setting up an AADAP proxy, which is required for the use of mobile apps.

### General Ledger fixes

- When you post contract and service payments together in the **3-3-1 Cash Receipts** window, both types of payments appear properly in the **1-10 Deposit Slips** window screen and on the printed deposit slip print.
- If you import a credit card payment using Bank Feeds, the payment now appears correctly as a positive amount in the Checks section in the **1-5 Bank Reconciliation** window.

### Accounts Payable fixes

- You can now use only manual checks, not online payments, to record zero-dollar payments. This is to avoid a situation where you might need to void a zero-dollar online transaction, later, which you cannot do for online payments.
- The ACH Vendor Payment Receipt report now prints up to 20 characters for the invoice number to avoid truncating long invoice numbers.
- In the **4-7-3 Credit Card Receipts** window, if you turned on the Skip During Entry property for the Vendor field, you no longer receive an error message when looking up a cost code

in the Job Cost window.

- In the **4-3-1 Invoice Selection** window, you receive the prescribed warning even if an expired certificate has no job and the Stop Pay value is No or blank in the vendor record.
- When you credit a direct expense account in the **4-7-7 Import Credit Card Transactions** window, Sage 100 Contractor reduces the associated job cost properly.

## Payroll fixes

- We fixed an issue where you could inadvertently archive payroll for the current year or a future year immediately after archiving the previous payroll year. You can no longer archive the current payroll year before December 1 of that year.
- Sage 100 Contractor prevents you from using non-standard expense accounts for payroll calculations by default. However, if your company needs more flexibility in designating expense accounts, you can override the default setting that requires direct expense accounts for payroll calculations.

For more information, see [Choose to use non-standard expense accounts in Payroll.](#)

- The **Sort Alpha** option works properly if you select it when printing the **5-1-8-61 Paygroup Hours** report.

## Project Management fixes

- In the **6-4-1 Change Orders** window, the Overhead amount is calculated correctly when the individual lines on the Prime Change Details tab have different rates.
- When you recall a record in the **6-6-1 Purchase Orders** window, if you enter and leave the Job text box, the address fields in the record no longer changes to the address for the job.

- In the **6-11-1 Requests for Proposal** window, changes you save to the tax district are retained when you recall the RFP record.

## Miscellaneous fixes

- Sage 100 Contractor warns you if you try to post a recurring transaction that includes an inactive account. You will not be able to post the transaction.
- The program no longer stops if you save as a template (in any window) and then click in a blank area in the **Existing Templates** box when there are existing templates.
- When running a custom report, you no longer receive the message "Error in processing report. Error details: Invalid object name 'mscflid'."
- When you print the **13-7-23 Security Settings** report with no criteria, the report now displays only information where field security is assigned.
- We've made some changes to the integration with Outlook in this release. If you've had trouble using Outlook with Sage 100 Contractor in the past, consider trying it again.

You may be able to use Microsoft Outlook to email from Sage 100 Contractor, depending on how Outlook is installed and configured on your computer. A variety of other computer conditions and settings can also affect whether you can use Outlook with Sage 100 Contractor.

We've researched some of the issues that may have prevented you from using Outlook to email your customer, vendors, and employees, and we have the following recommendations:

- Do not turn on the **Try the new Outlook** option in Outlook. Emailing from Sage 100 Contractor does not work with the new Outlook because Microsoft has

disabled 3rd-party email integrations with their new version.

- Make sure Outlook is running before you try to email from Sage 100 Contractor.
- You will not receive a Microsoft error message saying “Something went wrong” when you email from Sage 100 Contractor yourself.
- You can email scheduled reports and alerts using Outlook only if the person who scheduled the report or alert in the Windows Task Scheduler is logged into Windows and has Outlook open when the task runs.

For more information, see the following Knowledgebase articles:

- [Using Outlook for emailing in Sage 100 Contractor version 26.1 and later](#)
- [Email integration with Sage 100 Contractor does not work with New Outlook](#)

## Inventory fixes

- When you save a PO receipt in **12-4 Purchase Order Receipts**, if the purchase order did not include required information (for example, a required subaccount), you receive a more meaningful error message, telling you the information is missing from the purchase order.

## Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

### Accounts Payable fixes

- When you edit and then save a paid Accounts Payable invoice, Sage 100 Contractor correctly updates the invoice footer fields to prevent having a Paid status invoice with an outstanding Balance.

- The 2-11-21, -22, -31, and -32 reports now show GST/HST and QST credits for transactions that have a source of 26 - Credit Card Receipts and no vendor on the receipt.
- When entering records in the **4-7-3 Credit Card Receipts** window, you no longer receive an error when you use the **F5** key in the Account field.

## Dashboard fixes

- We redesigned the **Cash Flow by Job** report (displayed when you drill down to a job from Job Cash Flow to Date). The following new columns and associated subreports now exclude GST and HST:
  - \* Invoiced Job to Date
  - \* Cash Collected
  - \* A/P Cash Due (today)
  - \* Cash Paid Out (Costs-A/P)

The Net Cash in(out) column includes the *net* GST and HST collected and paid.

# Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Earlier versions of Sage 100 Contractor (SQL) provided a wide variety of new features, including many enhancements that our customers have requested.

The following table is a list of the most significant features introduced in earlier versions, details of which you can read about in the Release Notes for the respective version.

Enhancement (For details, see the <a href="#">v25.3 Release Notes</a> )	U.S. Only	Canada Only	API
• New items on the Resources menu			
• Custom reports to help satisfy special state reporting requirements	x		
• New process for tax-exempt Alabama overtime	x		
• Reduced minimum tax calculation for certain Nebraska employees	x		
• A new type of Employer Provided Dental Coverage field in employee records		x	
• New payroll tax types to accommodate Second CPP or Second QPPSecond CPP and QPP		x	

  

Enhancement (For details, see the <a href="#">v25.2 Release Notes</a> )	U.S. Only	Canada Only	API
• In the 3-5 Jobs window, we added a new Certified Payroll tab	x		

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Enhancement (For details, see the <a href="#">v25.2 Release Notes</a> )	U.S. Only	Canada Only	API
that contains additional certified reporting fields.			
<ul style="list-style-type: none"> <li>In Accounts Payable, you can specify whether a line in a purchase order is subject to sales tax.</li> </ul>	x		
<ul style="list-style-type: none"> <li>We added two new 1099 type (5 - Medical and 6 - Dividends) that will be passed to the Aatrix 1099 DIV form. The previous type 5 - No 1099 was adjusted to 7 - No 1099.</li> </ul>	x		
<ul style="list-style-type: none"> <li>We added a totals row to the 4-1-1-61 Vendor 1099 Report.</li> </ul>	x		
<ul style="list-style-type: none"> <li>We added a totals row to the 4-1-1-61 Vendor T5018 Report.</li> </ul>		x	
<ul style="list-style-type: none"> <li>In Payroll, you can add, edit, and delete pay types using a new 5-3-10 Custom Pay Types window.</li> </ul>			
<ul style="list-style-type: none"> <li>Several other improvements</li> </ul>			

  

Enhancement (For details, see the <a href="#">v25.1 Release Notes</a> )	U.S. Only	Canada Only	API
<ul style="list-style-type: none"> <li>Ability to create a Positive Pay file for protection against fraud</li> </ul>			
<ul style="list-style-type: none"> <li>New Purchase Order# and Subcontract# fields to apply payments to a subcontract or a purchase order</li> </ul>			
<ul style="list-style-type: none"> <li>New 4-7-7 Import Credit Card Transactions window</li> </ul>			
<ul style="list-style-type: none"> <li>Ability to reconcile downloaded credit card transactions</li> </ul>			
<ul style="list-style-type: none"> <li>Ability to edit posted credit card transactions</li> </ul>			

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Enhancement (For details, see the <a href="#">v24.3 Release Notes</a> )	U.S. Only	Canada Only	API
<ul style="list-style-type: none"> <li>• New quarterly and year-to-date reports</li> </ul>	x		
<ul style="list-style-type: none"> <li>• Updated tax tables</li> </ul>			

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Enhancement (For details, see the <a href="#">v24.2 Release Notes</a> )	U.S. Only	Canada Only	API
• Streamlined pre-built General Contractor Accounts and Subcontractor Accounts			
• The 3-5 Jobs (Accounts Receivable) grid displays changes for each cost type along with original budget amounts			
• Ability to remove computed but not posted time and material invoices			
• Ability to filter on cost codes in some lookup windows in Accounts Payable			
• Ability to easily display credit card charges and payments in some Accounts Payable windows			
• Ability to keep multiple years of payroll records with your current company			
• Separated payroll close and payroll archive processes			
• A new Default Overtime Over 40 Hours Per Week option in 5-2-2 Payroll Records			
• A new 11-1-10-41 Combined AR/SR Tax Report	x		
• Ability to select records by Transaction for the 2-6-0-21, 2-6-0-31 and 2-6-0-41 Check Register reports			
Enhancement (For details, see the <a href="#">v24.1 Release Notes</a> )	U.S. Only	Canada Only	API
• Account distributions on direct deposit pay stubs			

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Enhancement (For details, see the <a href="#">v24.1 Release Notes</a> )	U.S. Only	Canada Only	API
• GL Transaction Source Security			
• Payroll Admin security			
• Ability to import client contacts into a job			
• Ability to set rules for editing purchase orders			
• Ability to use Twilio as your email method			
• Ability to view user activity			
• Easily identify invoiced work orders on the Dispatch Board			
• Attribute wages and withholding tax for reciprocal state income tax	x		
• Standardized Occupation Code (SOC) in employee records	x		
• Many more improvements that customers asked for			

Enhancement (For details, see the <a href="#">v23.3 Release Notes</a> )	U.S. Only	Canada Only	API
• New Aatrix 1099-NEC Forms	x		

Enhancement (For details, see the <a href="#">v23.2 Release Notes</a> )	U.S. Only	Canada Only	API
Many customer-requested enhancements for both editions, including (and this is only a partial list):			
• A new window for printing deposit slips			
• Ability to add custom email messages for direct deposits			

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Enhancement (For details, see the <a href="#">v23.2 Release Notes</a> )	U.S. Only	Canada Only	API
• Ability to change jobs on computed payroll records			
• Better sorting on grids			

Enhancement (For details, see the <a href="#">v23.1 Release Notes</a> )	U.S. Only	Canada Only	API
Simple Time Entry			
Sage Time mobile app			
Easily Allocate Inventory-Related Use Taxes	x		

# Known issues and comments

The following sections describe known issues and problems in Sage 100 Contractor Version 26.1.

## Compliance and Payroll Checks

**Important!** The sample check forms that come with Sage 100 Contractor may not be fully compliant with all federal, state, and local laws, and other requirements that can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify check forms as needed to ensure compliance. For information about customizing check forms, see 13-5 Form/Report Page Design in the Sage 100 Contractor help, or contact your Sage business partner for assistance.

## Internet access required for Sage 100 Contractor

Sage 100 Contractor features, such as printing or efilings tax forms, submitting enhancement requests, accessing Help, or downloading periodic product or tax updates all require Internet access.

To take advantage of these features, ensure that any workstation or server that Sage 100 Contractor is installed on has access to the Internet.

During installation of Sage 100 Contractor, the computer serving as the Sage license server must be able to connect to the Internet to obtain licenses. Once installation is complete, you can check out license uses for each computer where Sage 100 Contractor is installed, then disconnect the Sage license server from the Internet.

## Configuring anti-virus software and third-party firewalls

During installation of the Sage 100 Contractor Hosting Framework, the Windows Firewall is configured automatically to enable the Sage 100 Contractor Hosting Framework to act as a TCP server. If you use some other firewall, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following procedure to configure the Windows Firewall manually to allow the Sage 100 Contractor Hosting Framework to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

### To configure the Windows Firewall:

1. Click **Start > All apps > Control Panel > System and Security**.
2. Open **Windows Firewall**, and then select **Allow a program or feature through Windows Firewall**.
3. Select Sage 100 Contractor **Hosting Framework** on the list, if it is not selected.

**Note:** By default, the exception is set to allow access by any computer on the network. You can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

### Files to exclude when manually configuring your firewall for Windows 10 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL
- C:\Program Files\Sage\Sage 100 Contractor SQL
- C:\ProgramData\Aatrix Software
- C:\Program Files\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL
- Network location of Sage 100 Contractor SQLdata. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

### **Files to exclude when manually configuring your firewall for Windows 10 Professional 64-bit**

- C:\ProgramData\Sage\Sage 100 Contractor SQL
- C:\Program Files (x86)\Sage\Sage 100 Contractor SQL
- C:\Program Files (x86)\Aatrix Software
- C:\ProgramData\Aatrix Software
- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL
- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

## **Software and hardware required to support Microsoft SQL Server**

Version 26.1 requires an instance of Microsoft SQL Server. You can download and use Microsoft SQL Express at no charge, or you can use the full version of Microsoft SQL Server. You can even start using Microsoft SQL Express, and upgrade to the full version of Microsoft SQL Server later, if necessary.

When you first open the new Database Administration tool, the program tries to configure an instance of Microsoft SQL Server with optimal settings for Sage 100 Contractor for you. If you do not already have an instance of Microsoft SQL Server, you can let the Database Administration tool download, install, and configure Microsoft SQL Express for you.

Refer to Knowledgebase article 240513182200173 for detailed information about supported operating systems and software, and for minimum hardware requirements.

## **Installation of Microsoft SQL Server on a domain controller is not recommended**

Microsoft recommends against installing SQL Server on a domain controller, and does not support SQL Server on a read-only domain controller should you encounter any problems with this configuration.

Because you must install Database Administration on the same machine as SQL Server, you should not install Database Administration on a domain controller. To guard against inadvertent installation on a domain controller and the potential for irrecoverable data losses, you will receive a warning if you attempt to install Database Administration on a machine used as a domain controller .

For more information, see the Microsoft Knowledgebase article <https://support.microsoft.com/en-us/kb/2032911>.

## About .NET Framework

### .NET 4.8 Framework is required

If Microsoft .NET 4.8 Framework is not already installed, it will be installed automatically when you install Sage 100 Contractor. Installation of .NET 4.8 Framework alone may take up to 20 minutes per computer.

Make sure that both your client and server computers meet the minimum requirements for installing both Sage 100 Contractor software and .NET 4.8 Framework.

**Note:** If Sage 100 Contractor requires an installation of .NET 4.8 Framework, the Sage 100 Contractor installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, you must do so to continue the Sage 100 Contractor installation.

### .NET 3.5 is also required

In some situations, you may need to turn on .NET 3.5 manually by selecting the .NET 3.5 checkbox in the Windows Features dialog box. For more information, see Knowledgebase article ID 68381, available at

<https://support.na.sage.com/selfservice/viewdocument.do?externalId=68381>.

### Turning on Microsoft .NET 3.5

Microsoft .NET 3.5 must be available and enabled prior to installing Sage 100 Contractor.

If you attempt to install Sage 100 Contractor without .NET 3.5 installed, you receive the following message during the licensing install:

“Sage.CRE.HostingFramework.Service v3.2 has stopped working.”

When you click [OK], the installation continues, but the services have not been installed so Sage 100 Contractor cannot open. The Sage.CRE.HostingFramework Service does not install unless .NET 3.5 is installed. If you receive the above message during installation, install .NET Framework 3.5., and then reinstall Sage 100 Contractor.

The following instructions are for Windows Server 2008 R2.

#### To verify that .NET 3.5 is installed:

1. Click the **Start** button in the lower left corner of the display.
2. Highlight **Administrative Tools** and select **Server Manager**.
3. In the **Server Manager** interface, click **Features** to display all the installed Features in the right-hand pane. Verify that .NET Framework 3.5.1 is listed.

#### To enable .NET 3.5:

1. In the **Server Manager** interface, select **Add Features** to display a list of possible features.
2. In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.
3. Once you expand **.NET Framework 3.5.1 Features**, you will see two checkboxes. Check the box next to .NET Framework 3.5.1 and click **Next**.
4. In the **Confirm Installation Selections** interface, review the selections and then click **[Install]**.
5. Allow the installation process to complete and then click **[Close]**.

**Note:** Enabling .NET Framework 3.5.1 may require a reboot.

## About network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. By default, Sage 100

Contractor uses the TCP starting port 48760. Certain configurations can potentially disable the communication:

- You must enable file sharing on your computers. To enable file sharing, follow the instructions in the Windows Help.
- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.
- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

## PCI DSS Compliance

PCI DSS stands for Payment Card Industry Data Security Standard. It was developed by the major credit card companies as a guideline to help organizations that process card payments to prevent credit card fraud, cracking, and other security weaknesses and threats.

A company processing, storing, or transmitting payment card data must be PCI-compliant or risk losing its ability to process credit card payments and being audited and/or fined. (For more information about PCI standards, see [https://www.pcisecuritystandards.org/.](https://www.pcisecuritystandards.org/))

Sage 100 Contractor payment processing works exclusively with Paya to enable merchants to seamlessly process check and credit card transactions directly in Sage 100 Contractor. The payment processing program uses Paya Exchange, a secure payment-processing application, to connect to Paya and process check and credit card transactions.

Integrating your financial and operations system with Paya lets you process check and credit card transactions without storing your customers' sensitive card information in your database. Paya Exchange transmits check and credit card details through a secure connection to Paya, where they are stored in a PCI-compliant vault, protecting your from exposure to non-compliance penalties and credit card fraud.

**Caution!** To avoid non-compliance with PCI standards, do not store credit card information in Sage 100 Contractor. Such storage creates unnecessary risk for your business and your customers.

## Tax Forms and eFiling by Aatrix configuration requirements

Tax Forms and eFiling by Aatrix requires an Internet connection for two reasons:

- For updating forms and executable files.
- For electronic filing (eFiling) of the forms.

If you experience an Internet connection problem, it may be due to problems communicating through an Internet firewall. Firewalls need to have access allowed through specific ports:

- The Tax Forms and eFiling Updater uses standard SSL/HTTP port 80 to access the site <http://updates.aatrix.com>.
- The eFiling component uses secure HTTPS on port 443 to access the site <https://efile.aatrix.com>.

By allowing access to aatrix.com, you allow both updates and eFiling. Occasionally, restrictions are tighter and only allow access to these ports by specific programs. Tax Forms and eFiling uses the following programs to access the Internet.

For updating using http on port 80 to <http://updates.aatrix.com>:

- aatrixforms.exe
- updater.exe
- updater2.exe

For eFiling using secure http on port 443 to <https://efile.aatrix.com>:

- builder.exe
- viewer.exe

## Use Adobe Reader Version 8.1.3 or later for faxing

Customers have reported problems faxing from Sage 100 Contractor with versions of Adobe Reader earlier than 8.1.3. Adobe Reader Version 8.1.3 and later support faxing from Windows and from Sage 100 Contractor.

**Important!** To fax from Sage 100 Contractor, the Windows Fax Service component must be installed with your Windows operating system. For more information about installing the Windows Fax Service component, see the Sage 100 Contractor Help topic, "Installing the Windows Fax Service component."

## Configuring Windows regional and short date format

To specify regional formats for Windows:

1. In **Control Panel**, click **Clock, Language, and Region**.
2. Click **Region and Language**.
3. On the **Formats** tab, select the format for your country.
4. Under **Date and time formats**, from the Short date format drop-down list, select the format used for your country.
5. Click **[OK]**.
6. Close the **Clock, Language, and Region** window.

## Windows "Sleep Mode" prevents computers from obtaining a license use

If the computer you are using as a license server goes into sleep mode, other computers on the network cannot obtain a license.

To avoid this possibility, set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never":

1. Go to **Control Panel > System and Security > Power Options**.
2. Select **Change when computer sleeps**.
3. From the **Put computer to sleep** list, select **Never**.