Sage 100 2019

Upgrade Checklist

February 2019

Checklists

These checklists provide instructions for migrating your data from your older Sage 100 installation and then upgrading the data to version 2019.

The upgrade process consists of three steps:

1. Preparing your data for upgrading
2. Upgrading your data to version 2019
3. Converting your data to version 2019

Proceed to the applicable checklist based on the version of Sage 100 that you're upgrading from.

- Upgrading from Version 2018 to Version 2019 on page 2
- Upgrading from Version 2017 to Version 2019 on page 12
- Upgrading from Version 2016 to Version 2019 on page 22
- Upgrading from Version 2015 to Version 2019 on page 32
- Upgrading from Version 2014 to Version 2019 on page 42
- Upgrading from Version 2013 to Version 2019 on page 52
- Upgrading from Version 4.50 to Version 2019 on page 62
- Upgrading from Version 4.45 to Sage 100 Premium Version 2019 on page 71

Upgrading From Version 4.40 or Earlier

If you are upgrading from Sage 100 version 4.40 or earlier, you must first upgrade to version 4.50 and install Product Update 8. The upgrade checklist is included in the Sage 100 4.50 Upgrade Guide, which is available here:
https://cdn.na.sage.com/docs/en/customer/100erp/4_5/open/UpgradeGuide.pdf

Upgrading from Version 2018 to Version 2019

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the Sage 100 Installation and System Administrators Guide.

Pre-Upgrade Checklist

You must prepare your version 2018 data for upgrading. This should be done for each company you plan to upgrade.

Note
You must print and update all journals and registers to prevent possible data loss during data upgrade.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.

  Note that you must install the Payroll module in addition to installing Sage 100. Payroll is not part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

  For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2018 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

6____ Print all customized form definitions.

7____ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

8____ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

9____ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2018 installation. Port 1433 is the default SQL Server port.

10____ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 2, you are ready to migrate your data to your version 2019 system.

- For Sage 100 Standard or Advanced, use the checklist below.
- For Sage 100 Premium, see the checklist on page 4.

Upgrade Checklist for Sage 100 Standard and Advanced

1____ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder's original sate.

2____ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

Note
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6____ If you customized your Desktop, review the customizations.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1____ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

WARNING
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2____ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

3___ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

WARNING
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

4___ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

5___ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6___ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7___ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 2 and the Upgrade Checklist on page 3, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

- **a** Start the Sage 100 installation program.
- **b** Select your edition of Sage 100.
- **c** Click Productivity Applications.
- **d** Click Install Sage Exchange Desktop to start the installation wizard.
- **e** Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.
- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.
- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.
- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4___ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5___ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6___ If you synchronize payroll data between your General Ledger module and Sage Payroll Services, verify that your Sage 100 company or companies are still linked to the service.

a Select General Ledger > Payroll Services > Payroll Services Synchronization Wizard.

b Sign in to Sage Payroll Services.

c Proceed through the wizard.

d Review the status messages shown in the Synchronizing Data with Sage Payroll Services window.

If you see a "Synchronization Complete" message, no further action is required.

If you see a "Synchronization failed" message, contact Sage Payroll Services Support for assistance with resetting the link.

7___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

8___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

9___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

10___ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
    - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
    - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
    - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
    - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.

- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

NOTE
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

11____ Test your customized Crystal reports and forms.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

12____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

13____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

14____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

15____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

16____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

17____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

18____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

19____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

20____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

21____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

22____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

23____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

24____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

25____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

26____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

27____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

28____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 2017 to Version 2019

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the Sage 100 Installation and System Administrators Guide.

Pre-Upgrade Checklist

You must prepare your version 2017 data for upgrading. This should be done for each company you plan to upgrade.

NOTE You must print and update all journals and registers to prevent possible data loss during data upgrade.

NOTE When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2017 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

6____ Print all customized form definitions.

7____ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

8____ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

9____ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2017 installation. Port 1433 is the default SQL Server port.

10____ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 12, you are ready to migrate your data to your version 2019 system.

- For Sage 100 Standard or Advanced, use the checklist below.
- For Sage 100 Premium, see the checklist on page 14.

Upgrade Checklist for Sage 100 Standard and Advanced

1____ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder's original sate.

2____ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

Note
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5___ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6___ If you customized your Desktop, review the customizations.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1___ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

⚠ **WARNING**
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2___ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

WARNING
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

3____ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

4____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

5____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 12 and the Upgrade Checklist on page 13, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.

- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.

- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.

- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4___ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5___ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6___ If you synchronize payroll data between your General Ledger module and Sage Payroll Services, verify that your Sage 100 company or companies are still linked to the service.

a Select General Ledger > Payroll Services > Payroll Services Synchronization Wizard.

b Sign in to Sage Payroll Services.

c Proceed through the wizard.

d Review the status messages shown in the Synchronizing Data with Sage Payroll Services window.

If you see a "Synchronization Complete" message, no further action is required.

If you see a "Synchronization failed" message, contact Sage Payroll Services Support for assistance with resetting the link.

7___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

8___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

9___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

10___ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
    - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
    - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
    - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
    - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.

- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

11____ Test your customized Crystal reports and forms.

NOTE
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

12____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

13____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

14____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

15____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

16____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

17____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

18____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

19____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

20____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

21____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

22____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

23____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

24____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

25____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

26____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

27____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

28____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 2016 to Version 2019

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the Sage 100 Installation and System Administrators Guide.

Pre-Upgrade Checklist

You must prepare your version 2016 data for upgrading. This should be done for each company you plan to upgrade.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

NOTE
When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2016 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

6___ Print all customized form definitions.

7___ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

8___ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

9___ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2016 installation. Port 1433 is the default SQL Server port.

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 22, you are ready to migrate your data to your version 2019 system.

- For Sage 100 Standard or Advanced, use the checklist below.
- For Sage 100 Premium, see the checklist on page 24.

Upgrade Checklist for Sage 100 Standard and Advanced

1___ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder's original sate.

2___ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

Note
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3___ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4___ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5___ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6___ If you customized your Desktop, review the customizations on the Custom toolbar.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1___ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

WARNING
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2___ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

3___ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.

- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

WARNING
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

4____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

5____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 22 and the Upgrade Checklist on page 23, you are now ready to convert your data to version 2019.

1____ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.
- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.
- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.
- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4___ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5___ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6___ If you synchronize payroll data between your General Ledger module and Sage Payroll Services, verify that your Sage 100 company or companies are still linked to the service.

a Select General Ledger > Payroll Services > Payroll Services Synchronization Wizard.

b Sign in to Sage Payroll Services.

c Proceed through the wizard.

d Review the status messages shown in the Synchronizing Data with Sage Payroll Services window.

If you see a "Synchronization Complete" message, no further action is required.

If you see a "Synchronization failed" message, contact Sage Payroll Services Support for assistance with resetting the link.

7___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

8___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

9___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

10___ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.

- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
  - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
  - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
  - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
  - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.
- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

NOTE
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

11____ Test your customized Crystal reports and forms.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

12___ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

13___ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

14___ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

15___ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

16___ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

17___ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

18___ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

19___ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

20___ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

21____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

22____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

23____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

24____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

25____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

26____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

27____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

28____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a. Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b. Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c. Click Install Sage Exchange Desktop.

d. Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 2015 to Version 2019

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the Sage 100 Installation and System Administrators Guide.

Pre-Upgrade Checklist

You must prepare your version 2015 data for upgrading. This should be done for each company you plan to upgrade.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

NOTE
When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2015 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

6____ Print all customized form definitions.

7____ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

8____ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

9____ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2015 installation. Port 1433 is the default SQL Server port.

10____ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 32, you are now ready to migrate your data to your version 2019 system.

For Sage 100 Standard or Advanced, use the checklist below. For Sage 100 Premium, skip to the next section.

Upgrade Checklist for Sage 100 Standard and Advanced

1____ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder’s original sate.

2____ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

Note
If you’re going to convert data for the Payroll module, you’ll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6____ If you customized your Desktop, review the customizations.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1____ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

WARNING
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2____ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

⚠ **WARNING**
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

3____ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

4____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

5____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 32 and the Upgrade Checklist on page 33, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.
- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.
- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.
- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4____ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5____ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6____ If you synchronize payroll data between your General Ledger module and Sage Payroll Services, verify that your Sage 100 company or companies are still linked to the service.

a Select General Ledger > Payroll Services > Payroll Services Synchronization Wizard.

b Sign in to Sage Payroll Services.

c Proceed through the wizard.

d Review the status messages shown in the Synchronizing Data with Sage Payroll Services window.

If you see a "Synchronization Complete" message, no further action is required.

If you see a "Synchronization failed" message, contact Sage Payroll Services Support for assistance with resetting the link.

7____ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

8____ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

9___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

10___ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
    - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
    - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
    - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
    - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.

- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

NOTE
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

11____ Test your customized Crystal reports and forms.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

12____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

13____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

14____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

15____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

16____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

17____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

18____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

19____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

20____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

21____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

22____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

23____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

24____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

25____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

26____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

27____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

28____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 2014 to Version 2019

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the Sage 100 Installation and System Administrators Guide.

Pre-Upgrade Checklist

You must prepare your version 2014 data for upgrading. This should be done for each company you plan to upgrade.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

NOTE
When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2014 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ If you use the Purchase Order module, you will have the option to start retaining purchase order history and to create history using records in your Purchase Order data entry files.

If you plan to create history, consider running the following utilities to clear out records that you do not want to include:

- Purge Completed Purchase Orders
- Purge Obsolete Purchase Orders

For more information on the utilities, see the help system.

6___ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

7___ Print all customized form definitions.

8___ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

9___ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

10___ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2014 installation. Port 1433 is the default SQL Server port.

11___ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 42, you are ready to migrate your data to your version 2019 system.

For Sage 100 Standard or Advanced, use the checklist below. For Sage 100 Premium, skip to the next section.

Upgrade Checklist for Sage 100 Standard and Advanced

1___ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder’s original sate.

2___ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6____ If you customized your Desktop, review the customizations.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1____ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

WARNING
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2____ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

3____ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

WARNING
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

4____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

5____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 42 and the Upgrade Checklist on page 43, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

If the Purchase Order module is set up for a company, a window with options for retaining purchase order history appears. You can set up the feature and create history during data conversion or you can do so at a later time.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.

- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.

- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.

- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4____ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5____ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6____ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

7____ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

8____ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

9____ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
  - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
  - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
  - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
  - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.
- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

Note
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

10____ Test your customized Crystal reports and forms.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

11____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

12____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

13____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

14____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

15____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

16____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

17____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

18____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

19____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

20____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

21____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

22____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

23____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

24____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

25____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

26____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

27____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 2013 to Version 2019

When upgrading to version 2019, you must perform a parallel installation. Use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the *Sage 100 Installation and System Administrators Guide*.

Pre-Upgrade Checklist

You must prepare your version 2013 data for upgrading. This should be done for each company you plan to upgrade.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

NOTE
When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

4____ Create a backup of your version 2013 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

5____ If you use the Purchase Order module, you will have the option to start retaining purchase order history and to create history using records in your Purchase Order data entry files.

If you plan to create history, consider running the following utilities to clear out records that you do not want to include:

- Purge Completed Purchase Orders
- Purge Obsolete Purchase Orders

6___ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

7___ Print all customized form definitions.

8___ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

9___ Run the Pre-Migration Utility on the Library Master Utilities menu. The utility examines your data and displays a list of tasks that you should run before migrating your data. For more information, see the Pre-Migration Utility help.

10___ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 2013 installation. Port 1433 is the default SQL Server port.

11___ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 52, you are now ready to migrate your data to your version 2019 system.

For Sage 100 Standard or Advanced, use the checklist below. Skip to the next section for Sage 100 Premium.

Upgrade Checklist for Sage 100 Standard and Advanced

1___ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder’s original sate.

2___ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6____ If you customized your Desktop, review the customizations.

Upgrade Checklist for Sage 100 Premium

Use this checklist to migrate your Sage 100 Premium data.

1____ For your Sage 100 2019 installation, create a backup of the following:

- The Sage 100 MAS90 folder
- The MAS_System SQL Server database

Creating backups now will save time if you need to revert to the installation's original state.

WARNING
You must have administrator rights for the server with your prior version of Sage 100 and the server with your version 2019 installation.

2____ Verify that the required rights and permissions are set up on the server(s) where SQL Server is installed. If the instance of SQL Server for Sage 100 2019 is installed on a different server than the instance used for your prior version, you must complete these steps on **both** servers.

a Open the Control Panel, select Administrative Tools, and the select Services.

b In the Services window, locate the SQL Server instance used for Sage 100 Premium, right click it, and select Properties.

c In the Properties window, click the Log On tab and select an option.

- If the SQL Server instance that you're using for version 2019 is installed on the same server as the instance used for your prior version of Sage 100 Premium, select Local System Account.
- If the SQL Server instance that you're using for version 2019 is installed on a different server than the one used for your prior version of Sage 100 Premium, select This Account.

  In the account field, enter: \\ServerName\Administrator

  Replace "ServerName" with the name of the server. Sage strongly recommends using the actual Administrator or Domain Administrator account.

  Enter the password for the account.

d Apply your changes and then stop and restart the services.

e If you're working with more than one server, make sure that all servers can access each other through hidden shares.

For example: \\ServerName\C$, \\ServerName\D$

3____ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012 or later, start the Parallel Migration Wizard from the Start window.

WARNING
Clustered drives do not allow hidden shares. If you are using clustered drives, follow the instructions in the Manual Workaround section of article number 76993 in the Sage Knowledgebase.

The Migration Wizard creates .bak files in the ..\DATA folders for the two SQL Server locations. The hidden shares are used to access the source databases to create the .back files. For example:

\\ServerName\c$\Program Files\Microsoft SQL Server\MSSQL12.MSSQLSERVER\MSSQL\Data

After the .bak files are created, the wizard copies them to the hidden share of the destination ..\DATA SQL Server folders.

To complete the process, the wizard then restores the databases into the new SQL Server location and removes the .bak files from both the source and destination locations.

If permissions were not set correctly on both servers, you may receive the following error: "Error Number : 0x80040e14 Description: Access Denied 5 or Access Denied 2 Setup will now terminate"

If this error occurs, see article number 76993 in the Sage Knowledgebase.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

4____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

5____ Review security tasks for new features in version 2019. Review ODBC security if it is used.

6____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

7____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 52 and the Upgrade Checklist on page 53, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

If the Purchase Order module is set up for a company, a window with options for retaining purchase order history appears. You can set up the feature and create history during data conversion or you can do so at a later time.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.
- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.
- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.

- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4___ If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5___ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

7___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

8___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

9___ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
    - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
    - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
    - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
    - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.
- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

  Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

NOTE
Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

10____ Test your customized Crystal reports and forms.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2019.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

11____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

12____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

13____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

14____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

15____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

16____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

17____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

18____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

19____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

20____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

21____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

22____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

23____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

24____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

25____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

26____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

27____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

- **a** Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.
- **b** Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.
- **c** Click Install Sage Exchange Desktop.
- **d** Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 4.50 to Version 2019

NOTE
You must install Product Update 8 for version 4.50 before upgrading to version 2019.

When upgrading to version 2019, you must perform a parallel installation, and use the Pre-Migration and Parallel Migration utilities from the Library Master Utilities menu to upgrade your data. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

If your system is integrated with Sage CRM, you must follow the instructions for upgrading Sage CRM in the *Sage 100 Installation and System Administrators Guide*.

Pre-Upgrade Checklist

You must prepare your version 4.50 data for upgrading. This should be done for each company you plan to upgrade.

1____ If you haven't installed Product Update 8 for version 4.50, install the update.

2____ Process all pending credit card transactions.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

3____ Print and update all journals and registers. Failure to do so may result in loss of data.

4____ If you use the Payroll module:

- Update the Payroll Check Register.
- Complete and purge all direct deposit transactions.
- If you have set up departments, you must have a user account set up with access to all departments in all companies. Department access must be assigned to individual user logon ID, ***not*** by groups. Groups are no longer used to manage department access.

NOTE
When converting data in version 2019, you must be logged in with a user account that has access to all payroll departments; otherwise, you will not be able to complete data conversion.

Note that you must install the Payroll module in addition to installing Sage 100. Payroll is **not** part of the Sage 100 installation program. To avoid the need to run a separate data conversion for Payroll, install the module before proceeding to the Upgrade Checklist.

For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at:
http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

5____ Create a backup of your version 4.50 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

6____ If you use credit card processing, verify that you have a valid credit card encryption key in Company Maintenance for proper conversion of credit card data.

7____ If you use the Purchase Order module, you will have the option to start retaining purchase order history and to create history using records in your Purchase Order data entry files.

If you plan to create history, consider running the following utilities to clear out records that you do not want to include:

- Purge Completed Purchase Orders
- Purge Obsolete Purchase Orders

For more information on the utilities, see the help system.

8____ Rebuild all data files.

- If you are upgrading from Sage 100 Standard or Advanced, use the Rebuild Key Files and Rebuild Sort File utilities.
- If you are upgrading from Sage 100 Premium, use the Rebuild Sort File utility.

You must answer Yes to all recalculation questions.

9____ Print all customized form definitions.

10____ If you are using eBusiness Manager, back up any templates, .htm files, and the IW folder before uninstalling the previous version of the Web Engine.

11____ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 4.50 installation. Port 1433 is the default SQL Server port.

12____ If you use the Payroll module, you must install it separately. For more information, see the Sage 100 Payroll Installation and Upgrade Guide available online at: http://cdn.na.sage.com/docs/en/customer/100erp/Documentation.htm

Upgrade Checklist

After completing the Pre-Upgrade Checklist on page 62, you are now ready to migrate your data to your version 2019 system.

1____ Create a backup of your version 2019 MAS90 folder. Creating a backup now will save time if you need to revert to the folder’s original sate.

2____ Select Library Master Utilities menu > Parallel Migration. Follow the steps in the wizard to migrate your data.

If you are upgrading Sage 100 Premium, start the Parallel Migration Wizard using one of the methods below, and follow the steps in the Wizard.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012, start the Parallel Migration Wizard from the Start window.

The Migration Wizard will back up the Sage 100 SQL databases for your prior version of Sage 100, copy the backup files to the server where Sage 100 2017 SQL Server instance is installed, and then restore them in the new location. Administrative rights are required for both your prior version of Sage 100 and for version 2017. The person running the Migration Wizard must have rights to the following administrative share: \\{sourceserver-name}\c$

If local security settings prevent the wizard from migrating the databases, use SQL Server Management Studio to back up the MAS_System and company databases that you want to migrate. Then copy the .BAK files to the ..\MSSQL\Data folder on the server where the Sage 100 2017 SQL Server instance is installed.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

3___ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

4___ Review security tasks for new features in version 2019. Review ODBC security if it is used.

5___ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

6___ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 62 and the Upgrade Checklist on page 63, you are now ready to convert your data to version 2019.

1___ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

a Start the Sage 100 installation program.

b Select your edition of Sage 100.

c Click Productivity Applications.

d Click Install Sage Exchange Desktop to start the installation wizard.

e Proceed through the wizard to install the program.

2___ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

If your data contains credit card records that will be transferred to a Sage Exchange Vault account, the Credit Card Conversion To Sage Exchange Vault Time Estimate window appears. This window provides an estimate of how long it will take to transfer the credit card data. This estimate is based on benchmark test results, but results will vary based on Internet connection speed, network traffic, and the number of customer credit card records stored in your system.

You may be able to decrease the estimate by updating credit card transactions and purging credit card data. If this window appears, click Yes to proceed with data conversion or click No to stop the conversion process.

Additional time is required to convert company data after the credit card records are transferred; that time is not included in the estimate shown on the window.

If the Purchase Order module is set up for a company, a window with options for retaining purchase order history appears. You can set up the feature and create history during data conversion or you can do so at a later time.

3___ If you are converting Payroll Data, the Payroll Data Conversion Wizard automatically opens. Companies that include Payroll data must be converted one by one. You'll be guided through the following tasks:

- Mapping department numbers. If you use payroll departments and any of the departments numbers contain special characters, you must enter new department numbers containing only alphanumeric characters to replace them.
- Selecting tax groups from the payroll tax database to replace your existing tax codes. If you are using local tax codes, each state and local tax code combination will be replaced by one tax group. Depending on which tax codes you're using, the wizard offers suggestions for you to review and update as needed.
- Adding tax groups to tax profiles. Tax profiles are collections of tax groups that you assign to employees to determine how their taxes are calculated. You can access Tax Profile Maintenance from the wizard to create tax profiles.
- Selecting filing statuses from the payroll tax database to replace your existing ones. The filing statuses in the database may differ from the ones that you are using. The wizard offers suggestions when possible for you to review and update as needed.

4___ Verify that credit card processing is enabled for each company in Company Maintenance if credit cards were previously being processed using Sage Payment Solutions. For more information, see Set Up the Credit Card Processing Module in the Help system.

If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

5___ If your system is integrated with Sage CRM, go into CRM Server Options, and update the following information as needed.

- Integration server port ID
- Sage CRM SQL server name
- Sage CRM SQL database name

The server name and database name should reference the mirror installation that you created for integration with Sage 100 2019. For more information on this process, refer to the Installing Sage CRM chapter in the *Sage 100 Installation and System Administrator's Guide*.

After updating the information, load the Sage CRM data.

6___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

For the Job Cost and Payroll modules, you must manually recreate all of your customized panels. User defined fields will be automatically converted.

7___ If you have customers with national accounts and credit cards are assigned to the sold-to customers, review those records to determine whether the credit card information should be manually transferred to the bill-to customer.

8___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

For the Job Cost and Payroll Modules, you must manually recreate all custom lookups.

9___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

10____ If you use the Payroll Module, review the list of enhancements in the *Sage 100 Payroll What's New* guide, available here: http://cdn.na.sage.com/docs/en/customer/100erp/2018n/open/Payroll_Upgrade.pdf

After reviewing the guide, complete the following tasks:

- Select Payroll > Setup > Earnings Code Maintenance. For each earnings code, select a tax rule.
- Select Payroll > Setup > Deduction Code Maintenance. For each pension or cafeteria plan deduction code, select a tax rule.
- Select Payroll > Setup > Company Tax Group Setup. For each tax group that you are using:
    - Enter the tax ID number for state and local tax groups. For the Federal tax group, the tax ID number entered in Company Maintenance appears and can only be viewed.
    - Enter the general ledger account numbers to credit with the tax amounts withheld from employees' pay.
    - On the Main tab, enter any tax rates that are specific to your company and the associated effective dates.
    - On the Taxes tab, in the Tax field, select the tax(es) for the selected tax group. The taxes available are based on the selected tax group. **Note:** There may be more than one tax that needs to be set up.
- Select Payroll > Setup > Tax Profile Maintenance. Review the tax profiles that were created when converting payroll data, and make changes if needed.
- Select Payroll > Main > Employee Maintenance. On the Taxes tab, enter at least one tax profile for each employee. Depending on the tax groups, you may need to enter a filing status, a Workers' Compensation code, or other information.
- Also in Employee Maintenance, on the Additional tab, verify that the correct selection appears in the Ethnicity/Race field.
- If you are using the security feature in Department Maintenance, you must recreate the lists of users who can access each department. Select Payroll > Setup > Department Maintenance, and click the Security tab.
- To ensure that your system can communicate with the tax calculation engine, add the following URL to your browser's trusted sites list: spa.na.sage.com

Complete this step on all workstations that will be used to process payroll, and also on the server where Sage 100 is installed if the Process Tax Calculation on the Server check box is selected in System Configuration.

11____ Test your customized Crystal reports and forms.

> **NOTE**
> Before modifying the graphical forms or reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

If you need to troubleshoot issues with customized reports and forms, run the Crystal Form Comparison Report utility to compare your customized reports and forms to the standard ones in version 2017.

To run the utility, select File menu > Run, and then type **SYWFCU**. The utility tells you which tables, if any, have been added to a report or form. It does not provide information about formatting changes, such as those affecting fonts, logos, and so forth.

If you were previously using non-graphical forms, you will need to set them up using SAP Crystal Reports.

If you are using Sage 100 Standard or Sage 100 Advanced, use the Crystal Reports Conversion Wizard to convert your Crystal reports and forms. For more information, see SAP Crystal Reports FAQs in the Help system. If you do not run the wizard now, it will automatically run the first time that someone runs a form or report.

If you are using Sage 100 Premium, refer to the Converting Reports for Sage 100 Premium section in the *Sage 100 Installation and System Administrators' Guide* for more information.

12____ For the Job Cost and Payroll modules, the Crystal Reports Conversion Wizard might partially convert your customized forms and reports. Test all of your customized forms and reports, and use Crystal Reports Designer to manually update or recreate them as needed.

13____ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

14____ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

15____ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

16____ For the Job Cost and Payroll modules, recreate all Visual Integrator import and export jobs.

17____ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

18____ Review your Business Insights Dashboard pages. For more information, see Set Up Business Insights Dashboard in the Help system.

19____ To use the eBusiness Manager module, restore the copied templates back to the IW folder after re-installing the Web Engine.

Copy the poweredby.gif image from the MAS90\Images folder to the IIS Inetpup\wwwroot\images folder and restart the IIS Web service.

20____ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

21____ Print all customized form definitions and compare them to the ones previously printed. Default forms may be erased in the upgrade process.

22____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

23____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

24____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

25____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

26____ Test all printers, including Device Configurator printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

27____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

28____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading from Version 4.45 to Sage 100 Premium Version 2019

Before upgrading your data to version 2019, you must perform a parallel installation and run the Parallel Migration utility from the Windows Start menu > All Programs > Sage program group. For more information, consult with your Sage business partner.

If you have custom modules or modifications to any of your modules, consult your Sage business partner or development partner prior to beginning the upgrade process.

Pre-Upgrade Checklist

You must prepare your version 4.45 data for upgrade. This should be done for each company you plan to upgrade. Several steps should be completed by a SQL Server® administrator.

NOTE
You must print and update all journals and registers to prevent possible data loss during data upgrade.

1____ Process all pending credit card transactions.

2____ Print and update all journals and registers. Failure to do so may result in loss of data.

3____ Create a backup of your version 4.45 MAS90 folder, which includes data for all of your companies. Perform this step following your usual backup process. For specific support on how to back up your data, refer to manuals for your backup software or contact the vendor from whom you purchased that product.

4____ Rebuild all data files using the Rebuild Sort File utility. You must answer Yes to all recalculation questions.

5____ Print all customized form definitions.

6____ If you are upgrading Sage 100 Premium, configure your firewall to allow access to port number 1433 on the server with your version 4.45 installation. Port 1433 is the default SQL Server port.

Upgrade Checklist

WARNING
You must have administrator rights for the server with the installation you are migrating from and the server with your version 2019 installation.

After completing the Pre-Upgrade Checklist on this page, you are now ready to migrate your data to your version 2019 system.

1____ Start the Parallel Migration Wizard using one of the methods below, and follow the steps in the wizard to migrate your data.

- If you are using Windows Server 2008, start the Parallel Migration Wizard from the Sage program group on the Start menu.
- If you are using Windows Server 2012, start the Parallel Migration Wizard from the Start window.

The Migration Wizard will back up the Sage 100 SQL databases for your prior version of Sage 100, copy the backup files to the server where Sage 100 2019 SQL Server instance is installed, and then restore them in the new location. Administrative rights are required for both your prior version of Sage 100 and for version 2019. The person running the Migration Wizard must have rights to the following administrative share: \\{sourceserver-name}\c$

If local security settings prevent the wizard from migrating the databases, use SQL Server Management Studio to back up the MAS_System and company databases that you want to migrate. Then copy the .BAK files to the ..\MSSQL\Data folder on the server where the Sage 100 2019 SQL Server instance is installed.

NOTE
If you're going to convert data for the Payroll module, you'll need access to Tax Profile Maintenance. If you use Payroll departments, you must have access to all departments in each company.

2____ After the migration is complete, log into Sage 100 2019 as the Administrator. Use the tasks available from the Administrative Tools window to review user security and set up and assign the appropriate roles to your users.

3____ Review security tasks for new features in version 2019.

4____ If you are using Unified Logon and you upgraded your system files, you must add the following statement on one workstation SOTA.ini: Logon=Yes.

5____ If you customized your Desktop, review the customizations.

Data Conversion Checklist

After completing the steps in the Pre-Upgrade Checklist on page 71 and the Upgrade Checklist on page 71, you are now ready to convert your data to version 2019.

1____ If your company data contains credit card information, install the latest version of Sage Exchange and verify that the workstation you are using has a working Internet connection. This is necessary so that credit card records can be transferred to a Sage Exchange Vault account during conversion. Credit card records must be transferred to a Sage Exchange Vault account before company data can be converted.

To install Sage Exchange:

- **a** Start the Sage 100 installation program.
- **b** Select your edition of Sage 100.
- **c** Click Productivity Applications.
- **d** Click Install Sage Exchange Desktop to start the installation wizard.
- **e** Proceed through the wizard to install the program.

2____ Select Library Master Main menu > Company Maintenance to convert your data to version 2019. This must be done for each of your companies.

If your data contains credit card records that will be transferred to a Sage Exchange Vault account, the Credit Card Conversion To Sage Exchange Vault Time Estimate window appears. This window provides an estimate of how long it will take to transfer the credit card data. This estimate is based on benchmark test results, but results will vary based on Internet connection speed, network traffic, and the number of customer credit card records stored in your system.

You may be able to decrease the estimate by updating credit card transactions and purging credit card data. If this window appears, click Yes to proceed with data conversion or click No to stop the conversion process.

Additional time is required to convert company data after the credit card records are transferred; that time is not included in the estimate shown on the window.

3___ Verify that credit card processing is enabled for each company in Company Maintenance if credit cards were previously being processed using Sage Payment Solutions. For more information, see Set Up the Credit Card Processing Module in the Help system.

If you were not processing transactions through Sage Payment Solutions but plan to start doing so, contact your Sage Payment Solutions account executive to convert the Sage Exchange Vault-only account created during conversion to a processing account.

4___ Update customized panels by selecting Custom Office Utilities menu > Update Customized Panels to Current Level. Review the placement of all user-defined fields.

5___ If you have customized Advanced Lookup Engine (ALE) lookups, after converting to the new version of the software and prior to accessing other modules, select Library Master Utilities menu > Lookup Conversion to convert your lookups.

6___ Verify that all module links are functional by selecting Library Master Utilities menu > Link Maintenance Utility. Links that appear in red are broken and will need to be fixed using the Relink button in Link Maintenance Utility. For more information on relinking files, see Copy/Move/Relink Files in your Help system.

7___ If you had the Extended Solution for customers with national accounts and the Populate Bill Address Block with 'Bill To' Customer Block check box was selected in AR-1068 Setup Options, you must run the Sales Order Bill To Address Fix Utility (select File menu > Run, then type *Utl) to populate the sales order bill-to address information with the bill-to customer's address information.

8___ Test your modified SAP Crystal reports and forms. Use SAP Crystal Reports Designer to modify reports as needed.

You must either be logged on using a Windows account that has read access to the applicable SQL Server database, or you must have a separate SQL Server authenticated logon ID and password. Integrated Security is used by default; if your Windows account does not have rights to the database, a logon dialog box appears, allowing you to enter a different logon ID and password for database access.

Before modifying forms or the standard Crystal reports found on the Custom Reports menu, you must be proficient in the use of SAP Crystal Reports.

9___ If Sage 100 2018 is installed on the same computer as an earlier version of Sage 100, complete this step to avoid errors when printing forms and reports in the earlier version:

Copy the pvxwin32.exe.config file from the ..\MAS90\Home folder in your 2018 installation to the same folder in the earlier installation. You must complete this step on both the server and the workstation.

10___ If your system has custom reports, review the Custom Reports menus to make sure they are available. If they are not, add them using Report Manager.

11___ If you use Sage Intelligence Reporting, create a new repository for use with Sage 100 2019 and import any custom reports into it. For detailed instructions, see Upgrading Sage Intelligence Reporting on page 77.

12___ If dictionary changes were made to any files used for import or export jobs created in the Visual Integrator module, those jobs will need to be manually updated.

To determine if manual updates are required, review the associated file layout information using the File Layouts and Program Information link on the Resources page of the Desktop. Verify that the imported field names are consistent with the new file layouts.

13___ Review the Paperless Office module configuration for e-mailing statements, reports, journals, registers, and other forms. For more information, see Set Up Paperless Office in the Help system.

14___ If you do not use taxation for purchase orders, clear the Sales Tax Reporting check box in Accounts Payable Options.

15___ If you include sales tax on purchase orders and want to enter default tax schedules for vendors, use Accounts Payable Assign Vendor Tax Schedules to set up tax schedules.

16___ Confirm in Accounts Receivable Customer Maintenance that all customers that have exemption numbers still have the exemption number defined.

17___ To unhide the Custom Financials menu and tasks, select File menu > Run and type ***unhidegl** in the Run Program window.

18____ If you purchased the Return Merchandise Authorization module, after setting up the data files for the first time, select Return Merchandise Authorization Setup menu > Create Customer Invoice Search Records to create customer invoice search records in RMA.

19____ To run Microsoft Script links, you must have the Microsoft Windows Script Host processor on your system. For information on installing the Microsoft Windows Script Host processor, refer to the Microsoft Download Center Web site.

20____ If you use Automatic Update or Task Scheduler, review your scheduled automatic updates and reschedule those updates by selecting Library Master Main menu > Automatic Update or Task Scheduler, as applicable.

21____ If you had task folders in your My Tasks area, re-create your Public and Private task folders.

22____ Test all printers, that you normally use for printing forms and reports. Each workstation must have a default printer defined.

23____ To use the auto-complete feature with enhanced search, run the Build Search Index utility to index your existing customer, vendor, and item records.

To run the utility, select Library Master > Utilities > Build Search Index.

24____ Install Sage Exchange Desktop on each workstation for each Windows user who needs to access credit card and ACH payment information in Sage 100.

To install Sage Exchange Desktop for Sage 100 Standard:

a Use Windows Explorer to browse to the MAS90\Wksetup folder.

If you are installing Sage Exchange Desktop on a workstation that connects to a Sage 100 Standard installation on a server, browser to the MAS90\Wksetup folder on the server.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

To install Sage Exchange Desktop for Sage 100 Advanced and Premium:

a Use Windows Explorer to browse to the server where Sage 100 is installed, and locate the MAS90\Wksetup folder.

b Double-click Autorun.exe to open the Workstation Setup program; it takes a few seconds to launch.

c Click Install Sage Exchange Desktop.

d Proceed through the steps in the Sage Exchange Desktop installation wizard to install the program.

Upgrading Sage Intelligence Reporting

If you use Sage Intelligence Reporting, follow the steps in this chapter to create a new repository for Sage 100 2019. If you have custom reports, follow the instructions to export custom reports from your prior version of the program and import them into the new repository.

For detailed instructions on each step, see:

- Export Custom Reports on this page
- Create a New Repository on page 78
- Set Up Sage Intelligence Reporting in Sage 100 2019 on page 78
- Import Custom Reports on page 79

Report Compatibility

Reports can be imported only from an earlier version of the program or another instance of the same version. For example, you can import a report created in version 2013 into version 2019. You ***cannot*** import a report created in version 2019 into version 2013.

Reports created in Sage 100 Standard and Sage 100 Advanced are not compatible with Sage 100 Premium. Likewise, reports created in Sage 100 Premium are not compatible with Sage 100 Standard and Sage 100 Advanced.

Export Custom Reports

In your prior version of Sage 100, export all of the custom reports that you want to use in version 2019.

To export custom reports

1. In your prior version of Sage 100, select Sage Intelligence Reporting Main menu > Report Manager.
2. Right-click a report and then click Export Report. (Alternately, select a report and then, on the Tools menu, click Export Report.)
3. Select the location where you want to save the file and then click Save. A file with an AL_ extension is created.
4. Repeat these steps for all custom reports that you want to use in version 2019.

Create a New Repository

NOTE
These steps may vary depending on what version of Windows you are using. Check with your network administrator if you need assistance.

Create a shared folder to use as the Sage Intelligence Reporting repository for Sage 100 2019. We recommend using a separate repository for each installation of Sage Intelligence Reporting.

To create a repository

1. Use Windows File Explorer to create a folder in the desired location.
2. Right-click the folder, point to "Share with," and click "Advanced sharing."
3. On the Sharing tab, select the "Share this folder" check box.
4. Enter a share name.
5. Click Permissions.
6. For all applicable users, select the Full Control or Read and Write check boxes.
7. Click OK.
8. If you use reporting trees or distribution settings, copy the following folders from the old repository to the new one:
    - Report Trees
    - Distribution

Set Up Sage Intelligence Reporting in Sage 100 2019

After creating the shared folder, enter its location in Sage 100 2019. If you haven't already registered your 2019 version of Sage Intelligence Reporting, you will be asked to do so.

To set up Sage Intelligence Reporting

1. In Sage 100 2019, select Sage Intelligence Reporting Main menu > Report Manager.
2. Click File and then click Change.
3. Click Yes in the message window.
4. In the Network Repository Path field, type the UNC path to the shared folder that you created. For example: \\ServerName\ReportRpository
5. Click OK.
6. If you receive a message asking you to register Sage Intelligence Reporting, click OK to open the License Manager window.

7 In the Account Number field, enter your Sage customer number.

8 In the Serial Number field, enter you unlocking key. This field is case-sensitive.

9 Click Apply and then click Perform Registration.

Import Custom Reports

After creating the new repository and registering Sage Intelligence Reporting, import any custom report files.

To import custom reports

1 If you want to create folders to organize your reports, on the Home tab, click Add Folder.

2 Right-click either the Home folder or any custom folder created in step 1, and click Import Report. (Alternately, you can click the Tools tab, and then click Import Report.)

3 Select one of the custom reports that you exported from your prior version.

4 In the Import Report window, in the Target Connection field, select a connection.

- For consolidated reports, select Sage MAS Consolidation.
- For any other type of report, select Sage MAS (Auto Connect).

NOTE
You must own the Sage 100 Intelligence Connector module to generate consolidated reports.

5 In the Report Destination field, select the folder for the report.

6 Click Import.

7 On the Home tab in the Actions group, click Refresh.

8 Repeat these steps for any other custom reports that you exported from your prior version of Sage Intelligence Reporting.