

Sage Master Builder v12.1 Release Notes

September 2006

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Section 1. Product Enhancements provides current release information for previously reported product enhancements in Sage Master Builder software.

Section 2. Resolved Issues provides information about recently resolved issues in Sage Master Builder.

Section 3. Known Issues & Comments provides comments recently discovered issues in Sage Master Builder.

1. Product Enhancements

DRO	ENHANCEMENT	DESCRIPTION
Global Sage Master Builder Program		
	<ul style="list-style-type: none">Customers have been requesting a dashboard-type tool that provides financial reports and financial data for executives.	<p>Sage Master Builder now includes the Executive Dashboard window providing extensive views of financial information as well as specialized reporting functions.</p> <p>From the Executive Dashboard window, you can drill-down into the financial data into reports and individual records.</p> <p>The Executive Dashboard comes with security features so that you can reveal the Executive Dashboard and its information to selected employees.</p>

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2. Resolved Issues

DRO	ENHANCEMENT	DESCRIPTION
Global		
•	Using drill-down functionality may cause MB to change the value of the field being “drilled down” to. This can occur if the record that is opened via drill down has notes that begin with a number.	The Sage Master Builder program code has been changed. The Notes functionality does not affect the drill-down functionality.
Federal and State Income Tax		
•	The Ohio State tax table have changed mid-year, so they must be updated in the Sage Master Builder program.	The Ohio State tax tables have been updated in the Sage Master Builder program.
Sage Master Builder Documentation		
•	There is no F1 Help link for the Contract Summary window when accessed through 3-2 Receivable Invoices/Credits window.	The F1 Help link has been fixed. Now you can press F1 while using the Contract Summary window to get Help about the creating invoices based on contract summaries.
•	In the Email Distribution window, the F1 Help is linked to the wrong topic.	The F1 Help link has been fixed. Now you can press F1 while using the Email Distribution window to get Help about that subject.
•	In the Fax Distribution window, the F1 Help is linked to the wrong topic.	The F1 Help link has been fixed. Now you can press F1 while using the Fax Distribution window to get Help about that subject.
•	There is no F1 Help for the Posting Routes window.	The F1 Help link has been fixed. Now you can press F1 while using the Posting Routes window to get Help about that subject.

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DRO	ENHANCEMENT	DESCRIPTION
Sage Master Builder Documentation		
	<ul style="list-style-type: none">There is no “Help” menu item in the menu bar on the Select Purchase Orders to Issue window. Nevertheless, when you press F1, you see a Help topic, but it’s the wrong topic.	<p>The F1 Help link has been fixed. Now you can press F1 while using the Select Purchase Orders to Issue window to get Help about that subject.</p>
	<ul style="list-style-type: none">When you press F1 on the Purchase Orders Retract Batch window, you see a Help topic, but it’s the wrong topic.	<p>The F1 Help link has been fixed. Now you can press F1 while using the Purchase Orders Retract Batch window to get Help about that subject.</p>
	<ul style="list-style-type: none">There are references to the phrase, “...highlight an item with a visual flag,...” in several Help topics. This functionality doesn’t exist.	<p>The phrase, “...highlight an item with a visual flag,...” has been removed from three topics “About takeoffs and estimating,” Working with estimating and assemblies and parts,” and “Add-on modules.”</p>
	<ul style="list-style-type: none">The topic “Certified Sage Master Builder ProAdvisors” needs to be updated. It contains obsolete information.	<p>The topic “Certified Sage Master Builder ProAdvisors” has been updated. It is in a section called “Solution Providers and ProAdvisors,” and the topic is now named “About Business Partners and Certified Sage Master Builder ProAdvisors.”</p>
	<ul style="list-style-type: none">The Sage Master Builder program displays messages that explain the process for reversing payroll records; however, there is no Help topic about posting reversed payroll records to the general ledger.	<p>A new Help topic has been written called “Reversing payroll records.” It is located in the Payroll section of the Help.</p>
	<ul style="list-style-type: none">Add an explanation in Help about how to display a work order as “Unassigned” on the Dispatch Board.	<p>An important note has been added to the Help topic, “Entering location and scheduling service calls” so that you will know how to display a Work Order on the Dispatch Board as “Unassigned.”</p>
	<ul style="list-style-type: none">Links are broken from Sage Master Builder Help topics about the Enterprise edition WebHelp.	<p>The links have been repaired. Enterprise customers can now access Enterprise edition WebHelp from Sage Master Builder Help.</p>

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Sage Master Builder Documentation		
•	There is no Help for adding employee training types and for adding employee license types.	New Help topics have been written for adding employee training types and for adding employee license types. The topics for Tracking employee training and Tracking employee licenses have been edited. Now this section of the Help is more complete.
•	The topic about Editing fax cover pages needs a note to tell customers that they need to have a modem installed and the faxing service set up in Windows to be able to edit fax cover pages.	The topic about Editing fax cover pages now has a note telling customers that they need to have a modem installed and the faxing service set up in Windows to be able to edit fax cover pages.
•	The Help topic Processing Payroll describes features that were in Sage Master Builder version 6.	The topic has been updated and now all the references are to functionality in version 7 and later. The topic is no longer confusing.
•	The topic “More about adding parts/updating prices” needs more information stating that source files for cost codes and cost types must be numeric.	The topic “More about adding parts/updating prices” now contains a bullet point stating that source files for cost codes and cost type must be numeric.
2-3 Income Statement Report		
•	The 2-3-61 General Ledger Cost Comparison report excludes source 17, payroll summary for general ledger costs, but not for job costs. The report should not exclude payroll summary.	The Sage Master Builder report has been fixed. The 2-3-61 General Ledger Cost Comparison report includes source 17, payroll summary.

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DRO	ENHANCEMENT	DESCRIPTION
3-2 Receivable Invoices/Credits		
●	If you are accessing the Contract Summary from the 3-2 – Receivable Invoices when the job doesn't have a contract, a division by zero error can occur if you press the Enter key when the cursor is in the Amount to Bill text box.	The Sage Master Builder program code has been fixed. A division by zero error cannot occur if you press the Enter key when the cursor is in the Amount to Bill text box.
3-4 Statements		
●	Sage Master Builder should not allow posting finance charges to period zero.	Sage Master Builder program now prevents posting finance charges to period zero of the current company.
3-9 Unitary Billing		
●	Unitary Billing is dropping the third and fourth decimal places in the "Previous Quantity" value when processing the "Next" Application. This affects the calculation of the Total Quantity and the Balance Quantity.	The Sage Master Builder program code has been fixed. The "Previous Quantity" value no longer drops the third and fourth decimal places when processing the "Next" Application.

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DRO	ENHANCEMENT	DESCRIPTION
3-10-2 Compute T&M Invoices		
●	On the 3-10-2 Compute T&M Billing window, Sage Master Builder displays the Cost Code look-up list instead of the Phase list when: (1) the second Job# criteria is left blank or (2) there are multiple jobs selected in the job Pick List selection.	The program code dealing with the phase selection criteria on 3-10-2 Compute T&M Billing window has been fixed. It displays the correct list of phases when queried.
4-2 Payable Invoices/Credits (Includes 6-1-12 and 6-1-13)		
●	Credits referencing an invoice with secondary payees may not update the invoice properly, possibly leaving an invalid amount set to pay.	The Sage Master Builder program code has been fixed. Invoices with secondary payees are updated correctly when a credit is applied against them
●	Project Management reports that include committed costs are inaccurately including Subcontracts that have a Refused Status. This refers to 6-1-12 Committed Cost Report and 6-1-13 Home Builder Reports.	<p>The Sage Master Builder program code has been fixed.</p> <ol style="list-style-type: none">1. For Subcontract management, the program doesn't allow a selection of a Subcontract # that has a Refused Status in 4-2 Payable Invoices/Credits window.2. To correct the report flaws, the program doesn't include "Subcontract with Refused Status" in the committed cost calculations.3. Important: To make the report solution backwards compatible on Subcontracts that have already been invoiced, you must change existing Subcontracts with a "Refused" Status to "Current" or "Closed" Status. <p>This fix maintains the integrity of Subcontract management. Sage Master Builder accurately reports on committed costs that are associated with Subcontracts.</p>

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DRO	ENHANCEMENT	DESCRIPTION
4-2 Payable Invoices/Credits (Includes 6-1-12 and 6-1-13)		
●	<p>If the Verify Date/Period check box is selected in the 1-8 Ledger Setup window, Sage Master Builder does not verify the transaction date against the current Period in the following windows: 1-3 Journal Transactions, 3-2 Receivable Invoices, 4-2 Payable Invoices, and 12-2 Inventory Allocation.</p> <p>This occurs when you use the Save command from Job or Equipment Costs windows with the Cost window displayed by using the Costs menu command.</p>	<p>The Sage Master Builder program code has been changed. The program now consistently displays warnings for transaction dates that are not in the current Period if the Verify Date/Period check box is selected in the 1-8 Ledger Setup window.</p>
4-6 Recurring Payables		
●	<p>An audit error can occur when posting a 4-6 Recurring Payables record that uses prices with four decimal places.</p>	<p>Sage Master Builder now performs proper rounding in the calculation of the invoice totals in screen 4-6 Recurring Payables. This prevents audit errors.</p>
5-1-6 Certified Payroll Reports (5-1-6-56)		
●	<p>The Alaska 5-1-6-56~No Work Certified Payroll Report Compliance page needs to be edited and updated.</p>	<p>The Alaska 5-1-6-56~No Work Certified Payroll Report Compliance page has been edited and updated.</p>
5-1-7 Union Payroll Reports (5-1-7-21, 5-1-7-26)		
●	<p>When the Union Payroll reports 5-1-7-21 and 5-1-7-26 are run with two employees that have the same first and last name, each payroll record is printed as a separate line instead of grouping one line for each employee.</p>	<p>The Sage Master Builder program code has been fixed so that employees are grouped one per line.</p>

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DRO	ENHANCEMENT	DESCRIPTION
5-2-2 Payroll Records		
	<ul style="list-style-type: none">When entering or editing payroll records in 5-2-2 Payroll Reports, an employee who is not assigned to a paygroup may have a paygroup assigned to his/her record from a different employee who is assigned to paygroup.	The Sage Master Builder program code has been fixed. An employee who is not in a paygroup is not automatically assigned to the paygroup of a different employee. Payroll entry is now accurate and does not require manual correction.
	<ul style="list-style-type: none">The topic about Certified Sage Master Builder ProAdvisors contains obsolete information. It needs to be updated.	The topic about Certified Sage Master Builder ProAdvisors has been updated. It now mentions Business Partners and Certified Sage Master Builder ProAdvisors.
5-2-3 Compute Payroll		
	<ul style="list-style-type: none">Employer paid local taxes are not posting to the direct expense account when using combined localities with a job. Instead of posting to the direct expense account on the payroll calculations, the taxes are posting to the Overhead or Admin expense account on the payroll calculations.	The Sage Master Builder program code has been fixed. The employer paid local taxes are now posting to the direct expense account when using combined localities with a job.
5-3-1 Payroll Calculations		
	<ul style="list-style-type: none">The check box “Emp# as Subaccount” is unavailable when creating a new calculation on 5-3-1 Payroll Calculations if the selected Tax Type is Local Income Tax.	The Sage Master Builder program code has been fixed. You can choose to select the “Emp# as Subaccount” check box, as desired. Now liability accounts that are used for Local Income Tax calculations can be divided by employee.

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DRO	ENHANCEMENT	DESCRIPTION
5-4-4 Payroll Audit		
●	FICA may continue to calculate if the maximum wage per year on the payroll calculation is less than the maximum wage on the calculation in the employee file even after an employee's year-to-date income has exceeded the FICA wage limit	The 5-4-4 Payroll Audit has been enhanced to report when an employee's FICA rate or maximum or employee's Medicare rate doesn't match the corresponding payroll calculation. This verification ensures that the correct maximum for employee FICA is recorded on both the payroll calculation and the employees' file
6-1-13 Report 21 and 26		
●	When you run the 6-1-13-21 or 6-1-13-26 Committed Budget/Cost Variance reports, the Committed Costs column improperly reduces for applied costs. This is causing inaccurate reporting.	The Sage Master Builder reports 6-1-13-21 and 6-1-13-26 have been fixed. For clarity, the "Committed Costs" column has been renamed "Total Committed." To correct the report flaw, this column is now calculated from the original unadjusted committed costs. That means it will not be reduced by: (1) the job costs associated with the AP invoices referencing a Subcontract or (2) by Purchase Order received amount.
6-3 Job Costs (also 3-2 Receivable Invoices/Credits and 4-2 Payable Invoices/Credits)		
●	Posting 11-2 Service Invoices to Period 0 and also to an archive company saves job cost records in the archive company to Period 0 instead of Period 12.	The Sage Master Builder program code has been fixed so that posting 11-2 Service Invoice records to an archive company saves job costs to Period 12 instead of Period 0.

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DRO	ENHANCEMENT	DESCRIPTION
6-3 Job Costs (also 3-2 Receivable Invoices/Credits and 4-2 Payable Invoices/Credits)		
●	When the user updates the Invoice # on a 3-2 Receivable Invoice or 4-2 Payable Invoice, and when the invoice record was initially entered with a Paid Status, Sage Master Builder has been updating (1) all job cost records directly entered in 6-3 Job Costs and (2) all equipment cost records directly entered in 8-3 Equipment Costs incorrectly.	The Sage Master Builder program code has been fixed. Job cost records entered directly in 6-3 Job Costs and equipment cost records entered directly in 8-3 Equipment Costs are not affected by updating the Invoice# on an existing 3-2 Receivable Invoice or 4-2 Payable Invoice.
6-4-1 Change Orders		
●	Sage Master Builder may allow saving of changes on a change order record that has the "Lock Edit" check box selected. This causes unintended alteration in some records.	The "Lock Edit" selection works properly for all change order records. Change orders are now always protected from unintended alteration.
6-4-6 Prime Contract Audit		
●	Report 6-4-6-21 (Prime Contract Audit) excludes change orders that have no Approved amount. A change order with no Approved amount does not affect the contract, but it may represent a prime change order that should be assigned to an Approved status with an Approved amount. By excluding these change orders from the report, change work that should possibly be billed for may be overlooked.	The Sage Master Builder program code has been changed. Report 6-4-6-21 (Prime Contract Audit) includes change orders that have either a Requested amount or an Approved amount on the Prime Change Details tab of menu 6-4-1 Change Orders. This ensures that all pertinent change orders are included on the Prime Contract Audit.

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DRO	ENHANCEMENT	DESCRIPTION
6-6-1 Purchase Orders (also Auto-costing on 4-2 Payable Invoices/Credits and 12-2 Inventory Allocation)		
●	An overflow error causing Sage Master Builder to close unexpectedly occurs under certain conditions when running a process on grid with a large numbers of rows. The error can occur when there are a few hundred rows in the grid when: (1) creating a new PO from a Master PO; (2) Auto-costing on 4-2 AP Invoices; and (3) Auto-costing on 12-2 Inventory Allocation.	The Sage Master Builder program code has been fixed. It now prevents the overflow error and unexpected program close when: (1) creating a new PO from a Master PO; (2) Auto-costing on 4-2 AP Invoices; and (3) Auto-costing on 12-2 Inventory Allocation.
6-8-1 Cost to Complete		
●	Sage Master Builder clears the User Defined and Notes columns in the 6-8-1 Cost to Complete, 6-8-2 Hours to Complete, and 6-8-3 Units to Complete windows when customers are using the Options > Update command.	Sage Master Builder now maintains entries in the Notes and User Defined columns in the 6-8-1 Cost to Complete, 6-8-2 Hours to Complete, and 6-8-3 Units to Complete windows after customers update using the Options > Update command.
6-10 Unitary Proposals		
●	In the 6-10 Unitary Proposals window, when: (1) displaying an existing record that has multiple Phases and a Phase other than the defaulted Phase is selected by the user, and (2) the user clicks in the grid, then the Item Code, Description and Unit columns on the first row of the grid are over-written with default values of the Bid Item column on the first row.	The program code has been changed. When the user selects a Phase, the program no longer auto-fills the Bid Item defaults when they click the grid. The existing grid values are maintained.

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DRO	ENHANCEMENT	DESCRIPTION
6-11-2 Requests for Information		
●	Customers have been reporting an issue in 6-11-2 Requests for Information. The changes to the record aren't saved if the only field changed is RFI Type.	The program code has been changed. If only the RFI Type field is changed, the changes in the record are saved.
6-11-7 Punch List		
●	Sage Master Builder closes when: (1) the option to Hide Completed Items is turned on; (2) when scrolling through punch list records, a record with more than 20 items is displayed; and (3) all items in this record have a Completed date.	The program code in Sage Master Builder has been changed to prevent the program from closing when the option to Hide Completed Items is turned on and you scroll to a record with more than 20 items that are all complete.
7-1 Create New Company		
●	Move the Copy Company functionality from the Administration program to 7-Utilities	The Copy Company functionality has been moved under menu 7-Utilities, 7-1 Create New Company.
8-4 Equipment Allocation		
●	Sage Master Builder closes with no message when importing from Daily Field Reports when the number of imported rows exceeds the number of rows in the grid in 8-4 Equipment Allocation.	The program code in Sage Master Builder has been changed. Grid rows are added as necessary during the import from Daily Field Reports into 8-4 Equipment Allocation.
9-5 Takeoffs		
●	In some situations in the 9-5 Takeoffs window, Sage Master Builder is not updating the part costs in the grid correctly if it is over \$999.	The Sage Master Builder program code has been changed. Now the program updates the part costs in the grid correctly.

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DRO	ENHANCEMENT	DESCRIPTION
9-5 Takeoffs		
●	In some situations in the 9-5 Takeoffs window, Sage Master Builder closes after you delete lines of a Bid Item, save, and then switch to Bid Item 0.	The Sage Master Builder program code has been changed. It now prevents Sage Master Builder from closing unexpectedly after you delete lines of a Bid Item, save, and then switch to Bid Item 0.
●	A few customers have noticed that updating prices from vendors manually deletes the number before the decimal point.	The Sage Master Builder program code has been changed. It no longer deletes the number before the decimal point when updating vendor prices manually.
●	When exporting Purchase Orders by Change Order, several customers have noticed that the exporting process clears the date of previously exported Change Orders and re-selects the Export by Change Order menu command.	The Sage Master Builder program code has been fixed. When exporting Purchase Orders by Change Order, the exporting process does not clear the date of previously exported Change Orders or re-select the Export by Change Order menu command.
●	When the Takeoff grid is blank, updating the grid via Overhead/Profit by Cost Type causes Sage Master Builder to close unexpectedly.	The Sage Master Builder program code has been fixed. Now when a blank grid is updated via Overhead/Profit by Cost Type, Sage Master Builder no longer closes unexpectedly.
12-4 Purchase Order Receipts		
●	Some customers have noticed that Sage Master Builder allows receipt of Purchase Orders from the 12-4 Purchase Order Receipts window when the Purchase Order has a Status of Closed, Void, or Master.	The Sage Master Builder program code has been changed. It now prevents receipt of Purchase Orders in the 12-4 Purchase Order Receipts window when the Purchase Order Status is Closed, Void, or Master. This maintains the expected integrity of the PO system and maintains the consistency between 12-4 Purchase Order Receipts and 4-2 AP Invoices when receiving on Purchase Orders.

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DRO	ENHANCEMENT	DESCRIPTION
13-3 Report Writer – Calculate Fields Window		
7701	The tool tip for >= on the operators pad in the calculated fields window is incorrect. Currently it displays “Greater Less than or equal to.” This needs to be changed to “Is greater than or equal to.”	The tool tip for >= on the operators pad in the calculated fields window has been changed to “Is greater than or equal to.”