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2009 Year-end Update Ready for Download

December 22, 2009

Audience

This update is for all customers running Sage Master Builder Version 14.2.0 CD and Version 14.2.0 CD updates.

Note: If you receive this message but you are not the person in your company who downloads and installs software updates, please forward this message to the appropriate person.

What is in the 2009 Year-end Update?

The 2009 Year-end Update contains all government-mandated updates for 2009. In addition, it contains the currently available payroll-tax updates that become effective January 1, 2010. The update also includes program enhancements and fixes.

For further details, see the [Release Notes](#) section of this document.

What do you need to know before you download the update?

The 2009 Year-end Update only updates Version 14.2.0 CD and 14.2.0 CD updates. It does not update Version 13. If you are on Version 13, you will need to first upgrade to Version 14 before installing this tax update. If you are unsure which Sage Master Builder version you have installed, follow these instructions:

1. Launch Sage Master Builder, and log in to your company.
2. Click **Help > About Sage Master Builder**. The second line displays the CD version number.

We recommend that you do not to install the update until you have computed and processed all remaining payroll checks dated in 2009. Because the update installs federal and state income tax withholding tables that are effective beginning January 1, 2010, you should install the update after all payroll checks for 2009 have been processed. When closing your books, follow the year-end close procedures outlined in the *Year-end Close Checklists* document that is available in these locations:

- Under **Help > Contents and Index** tab > **1-6 Change Period/Close Year > Checklists for Closing the Books**
- Under **Help > Printable Documentation > Year-end Close Checklists**
- In the online Knowledgebase, search with the term "KB13227"
To access the Technical Support Knowledgebase, visit <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>

Download and Installation Instructions

Note: The 2009 Year-end Update is not the complete Sage Master Builder program It only updates payroll tax tables, program enhancements and fixes, and documentation.

To download the update:

1. Close Sage Master Builder before you download the software update.
2. Create a folder into which you will download the 2009 Year-end Update.
For example, you might create a folder under \MB7 named 2009YearEndUpdate.
 - For a multi-user/network configuration, save the file to a shared directory on a computer on your network.
 - For a stand-alone configuration, save the file to a folder on your computer.
3. Click the link below, or enter it into your Internet browser **Address** line. If you see a security alert, click **[Allow]**.
<http://cdn.updates.timberline.com/SoftwareAlerts/SMB143148.exe>
4. Click **Save**, locate the folder that you created in step 2, and download to that folder.
5. During the download, clear the check box, **Close this dialog box when download completes**.
6. Click **Open Folder**, and double-click the SMB143148.exe file.
 - If you are running the Windows® XP®, Windows 7®, or Server 2008® R2 operating system and you get a message advising you that the program publisher cannot be identified or verified, click **[Run]**.
 - If you are running the Windows Vista® operating system and you get a message advising you that an unidentified program wants to access your computer, click **[Allow]**.
7. On the **WinZip Self-Extractor** window, click **Browse**.
8. Locate the folder you created in step 2, and click **Unzip**.
9. After the file has been unzipped successfully, click **OK** and then click **Close**.

To install the update:

Note: It is important to install this software update to all locations on your network. This will make sure that all locations contain the latest payroll tax changes and program updates. To ensure that the software update is installed to all necessary locations, first install the software update directly to the Sage license server, and then install it to the local drives of all other workstations.

1. Close all open programs before installing the update except for firewall and antivirus programs.
2. Browse to the drive and folder where you saved SMB143148.exe file.
The file contains a \CAB Files folder, ReleaseNotesv14.pdf, and MasterBuilderUpdater.exe.
3. Double-click MasterBuilderUpdater.exe to begin the installation.
 - If you are running the Windows XP operating system and you get a message advising you that the program publisher cannot be identified, click **[Run]**.
 - If you are running the Windows Vista operating system and you get a message advising you that an unidentified program wants to access your computer, click **[Allow]**.
 - If you are running the Windows 7 or Server 2008 R2 operating system and you get a message asking if you want to allow the following program to make changes to this computer, click **[Yes]**.
4. On the **Welcome** window, click the button to view the *Release Notes*, or click **[Next]** to continue the installation process.
5. Select a drive on which you would like to install the Sage Master Builder 2009 Year-end Update.

The installation process locates both local and network installations. To install to other locations, re-run `MasterBuilderUpdater.exe`.

6. Click **[Next]**.
The updater installs the software update.
7. Select **Yes, I want to restart my computer now** if you are prompted, and then click **[Finish]**. If the option to restart your computer is not presented, click **[Finish]**.
8. Repeat steps 1-7 to update all other computers running Sage Master Builder and the computer where you data is located.

Note:

- On PCs running the Vista operating system, if you receive a Windows **Program Compatibility Assistant** message after completing the installation advising you that the program may not have installed correctly, click the option, **This program installed correctly**.
- The first time you launch Sage Master Builder after installing the update, you will be prompted to rebuild indexes in each company that you open. You only have to rebuild indexes once from one computer for each company.

Release Notes

To view the entire Version 14 *Release Notes* document, from the main Sage Master Builder window, click **Help > Printable Documentation > Release Notes**.

2009 Year-end Update

Version 14.3 (Version 14.2.0 CD Update 3) - 12/2009

Payroll tax version 2010.1 (12/17/2009)

Enhancements

2010 government-mandated state payroll tax tables changed for these jurisdictions:

- California
- Connecticut
- Delaware
- Kentucky
- Maine
- Minnesota
- New Jersey
- New York
- North Dakota
- Oklahoma
- Rhode Island
- Vermont

Note: The Arizona Form A-4 has new percentage election options starting on January 1, 2010. These new options did not require a change to Sage Master Builder. Customers filling out the Arizona Form A-4 need to review the new percentage election options.

Federal Income Tax

Government-mandated payroll taxes have changed for 2010.

General Functionality

Support for Microsoft® Windows® 7 Professional and Server 2008 R2 Standard operating systems

Sage Master Builder now supports customers running the Microsoft Windows 7 Professional (32-bit and 64-bit) and Server 2008 R2 Standard (64-bit) operating systems on their client workstations and servers.

New message appears in the 2009 Year-end Update installation process

During the installation process, a message warns you not to install the update until you have computed and processed all remaining payroll checks dated in 2009. Because the update installs federal and state income tax withholding tables that are effective beginning January 1, 2010, you should install the update after all payroll checks for 2009 have been processed.

1-General Ledger

1-6 Change Period/Close Year

When closing the general ledger in Version 14.3, the program uses a different process for handling prior-year cash-account items and no longer overwrites the prior-year check file. This enhancement allows you to reference open prior-year items in the 1-5 Bank Reconciliation window from your previous close.

Note: This enhancement is not in effect if you close your books before you install the 2009 Year-end Update (Version 14.3).

4-Accounts Payable

4-3 Vendor Payments

Now when paying vendors, the program now saves the vendor remit information in the **Payee** field of the general ledger transaction. This provides a paper trail referring to whom the check was sent.

5-Payroll

941 Quarterly Report

The **941 Schedule B** report for 2010 has been added to the program.

5-4-2 State Quarterly

The **Alaska State Quarterly** report for 2010 has been added to the program.

5-4-3-31 New Jersey W-2s report

The program now provides a new W-2 report to meet the New Jersey requirements for worker contributions for:

- Unemployment Insurance
- Workforce Development Partnership Fund/Supplemental Workforce Fund
- Disability Insurance
- Family Leave Insurance.

Note: You can locate the New Jersey W-2 sample report on the **Samples** tab of the **5-4-3 Report Printing** window.

Fixes

General Functionality

Cost Distribution window displays correct description

When saving a record, the **Cost Distribution** window now defaults to and displays the correct description.

1-General Ledger

1-6 Change Period/Close Year

Invoices paid with zero-dollar checks no longer appear on the **1-6-21 Vendor Audit Detection** report as having missing payment histories.

The program's auditing performance has been improved.

3-Accounts Receivable

3-3 Cash Receipts

Manually typing the **Invoice#** of a service receivable invoice now verifies the discount with the **Discount Date** on the invoice.

5-Payroll

5-2-6 Payroll Posting

Posting the reversal of a third-party sick-pay check with employer expenses no long causes a trial balance audit error.

6-Project Management

6-1-7-21 Over/Under Billings Report

The **6-7-1-21 Over/Under Billings** report now displays the period entered in the selection criteria.

6-3 Job Costs window

When using the F7 key to set field properties for the **Cost** box on the **6-3 Job Costs** window, you can now clear any of the groups so that everyone has access.

11 Service Receivables

11-2 Work Orders/Invoices/Credits - Dispatch Board

The Dispatch Board no longer displays work order as "unassigned" if an employee has been assigned to the work order. This is true even if the **Scheduled** box has a different date than the **Assigned** column.

12-Inventory

12-2 Inventory Allocation

The **12-2-21 Packing Slip** and **12-2-31 Packing Slip-Land** inventory reports have been modified to improve their performance.

An inventory allocation with an adjustment on the final line no longer posts a one-sided general ledger entry.

Documentation

Help/User Guide

The topic "Entering time for equipment" has been updated and now refers to the correct column headings.

Additional Support

Online Support Request

If you would like assistance with a solution and your service plan provides online technical support:

1. Log on to <https://customers.sagenorthamerica.com/irj/portal/anonymous/login>.

2. Click **Self Service > My Requests > Customer Support Ticket**.
This sends your request directly to Customer Support.

Phone Support

If you prefer to speak to Customer Support and your Service Plan provides support assistance, call Customer Support at 800-866-8049. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific Time).

Upgrading Your Service Plan

If your service plan does not provide online technical support and you would like to add or upgrade a service plan:

1. Call 800-858-7098, or log on to <https://customers.sagenorthamerica.com/iri/portal/anonymous/login>.
2. Click **Self Service > My Requests > Customer Service Request**.

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