



# Sage 50 Accounting—Canadian Edition

## What's New

Release 2021.2

July 2021

Sage 50—Canadian Edition

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# Sage 50 Accounting—Canadian Edition (Release 2021.2)

This product update covers all product solutions of Sage 50 Accounting (Release 2021.2) and includes the updates from previous releases.

## What's new and product improvements

### New features and product enhancements

|   | Pro | Premium | Quantum |
|---|-----|---------|---------|
| <b>Improvements for Sage 50cloud</b>  |     |         |         |
| <b>Multi-user optimization for Remote Data Access</b><br>With certain exceptions when using Remote Data Access, you can now switch from single-user mode to multi-user mode or vice versa without needing to close Sage 50. This update simplifies your workflow and saves you time.                      |     | Yes     | Yes     |
| <b>AutoEntry + Remote Data Access</b><br>When working in a shared company and using AutoEntry, you no longer need to pause sharing before downloading transactions from AutoEntry.  | Yes | Yes     | Yes     |
| <b>Enhancement to Bank Feeds</b><br>When importing transactions from your bank, you can quickly process transactions in the Match Transactions window.  | Yes | Yes     | Yes     |
| <b>Government compliance</b>  |     |         |         |
| <b>Payroll tax updates for July 1, 2021</b><br>If you have a support plan that includes payroll tax updates, you benefit from timely and comprehensive in-house payroll processing within Sage 50 Accounting to help you save time and reduce the risk of payroll tax penalties at year-end. <sup>1</sup> | Yes | Yes     | Yes     |

<sup>1</sup> You need a service plan that includes payroll.

## Resolved Issues

The following issues have been resolved:

(Pro Accounting and higher) The help topics for Project Income and Allocation reports have been updated to show correct information regarding financial history for Pro Accounting, Premium Accounting, and Quantum Accounting.

(Pro Accounting and higher) In the reports for Vendor List, Vendor Group List, Customer List, and Customer Group List, the YTD column headers have been improved with the addition of either Fiscal Year or Calendar Year.

(Premium Accounting and higher) After a shared company is closed with an auto backup, the data is closed properly and other users are not locked out of their copy.

(Premium Accounting and higher) When processing recurring Sales transactions in the Daily Business Manager in multi-user mode, if a user posts a transaction that updates the due date to the next fiscal year, and another user posts the same transaction without refreshing the DBM, the second posting will now be correctly blocked.

(Premium Accounting and higher) In some rare cases, the item cost would be calculated incorrectly when building an item on the fly in Sales. This has been fixed.

## Payroll tax changes - Effective July 1, 2021

**Important!** If you have a support plan that includes payroll tax updates, your Product Update includes the payroll tax changes for July 1, 2021. For complete details on the CRA income tax changes, contact your local tax services office or visit the [CRA web site](#).

Your payroll update reflects the federal and provincial tax schedules in effect on July 1, 2021, as stated in the latest edition of the documents Payroll Deductions Formulas and Employers' Guide - Payroll Deductions and Remittances from the CRA, Revenu Québec's Guide for Employers: Source Deductions and Contributions, as well as the schedules of Employment Insurance, Canada Pension Plan, and Québec Pension Plan.

### What's new in this tax update

This tax update contains changes to payroll tax tables and Sage 50 Accounting payroll tax calculations. This document addresses only the payroll tax changes that may require you to adjust your payroll records.

### Changes to tax brackets and rates

The following changes have been announced for either tax rates or income thresholds. These changes are effective July 1, 2021, unless otherwise stated.

## New Brunswick

In May, the Government of New Brunswick announced a reduced tax rate for the first tax bracket, effective January 1, 2021. The existing rate of 9.68% has been reduced to 9.4%.

**Note:** For the remainder of the year, a prorated tax rate of 9.12% will apply to existing employees who have been taxed at 9.68% for the first six months.

## New Brunswick tax brackets and rates

| 2021 Brackets               | Rates  |
|-----------------------------|--------|
| First \$43,835              | 9.4%   |
| Over \$43,835 to \$87,671   | 14.82% |
| Over \$87,671 to \$142,534  | 16.52% |
| Over \$142,534 to \$162,383 | 17.84% |
| Over \$162,383              | 20.3%  |

## Workplace Safety and Insurance Board Maximum Assessable Earnings for Ontario

In April 2021, Ontario announced a change from \$102,800 to \$97,308 for WSIB.

| Provinces / Territories | Maximum Assessable Earnings |
|-------------------------|-----------------------------|
| Ontario                 | \$97,308.00                 |



# Sage 50 Accounting—Canadian Edition (Release 2021.1)

This product update covers all product solutions of Sage 50 Accounting (Release 2021.1) and includes the updates from previous releases.

## What's new and product improvements

### New features and product enhancements

|  | Pro | Premium | Quantum |
|--|-----|---------|---------|
| <b>Government compliance</b>   |     |         |         |
| <b>Canada Revenue Agency and COVID-19</b><br>CRA has changed reporting requirements due to COVID-19. With Release 2021.1, employment income during COVID-19 pay periods are now automatically calculated and reported on T4s. Sage helps you keep your business compliant. <sup>1</sup>                      | Yes | Yes     | Yes     |
| <b>Payroll tax updates for January 1, 2021</b><br>If you have a support plan that includes payroll tax updates, you benefit from timely and comprehensive in-house payroll processing within Sage 50 Accounting to help you save time and reduce the risk of payroll tax penalties at year-end. <sup>2</sup> | Yes | Yes     | Yes     |

## Resolved Issues

The following issues have been resolved:

(Premium Accounting and higher) Auto Backup was locking the database, which interfered with using Remote Data Access and converting the company file. This has been fixed.

(Pro Accounting and higher) When creating a Trial Balance report with the option Net Changes for Period, bank deposit transactions are no longer missing from the report's For Period columns.

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<sup>1</sup> You need a service plan that includes payroll.

<sup>2</sup> You need a service plan that includes payroll.

(Pro Accounting and higher) After processing an order with an inventory item and then changing the item number for that inventory item, any subsequent adjustment to the order will now properly affect the original item.

(Pro Accounting and higher) In Sage Accounting, if you processed an invoice and then turned off the regional tax for that invoice, you would get a generic error when downloading the transaction to Sage 50. The message has been improved to help clarify the steps needed to correct the problem.

## Payroll tax changes - Effective January 1, 2021

**Important!** If you have a support plan that includes payroll tax updates, your Product Update includes the payroll tax changes for January 1, 2021. For complete details on the CRA income tax changes, contact your local tax services office or visit the [CRA web site](#).

Your payroll update reflects the federal and provincial tax schedules in effect on January 1, 2021, as stated in the latest edition of the documents Payroll Deductions Formulas and Employers' Guide - Payroll Deductions and Remittances from the CRA, Revenu Québec's Guide for Employers: Source Deductions and Contributions, as well as the schedules of Employment Insurance, Canada Pension Plan, and Québec Pension Plan.

### What's new in this tax update

This tax update contains changes to payroll tax tables and Sage 50 Accounting payroll tax calculations. This document addresses only the payroll tax changes that may require you to adjust your payroll records.

#### Changes to tax brackets and rates

The following changes have been announced for either tax rates or income thresholds. These changes are effective January 1, 2021, unless otherwise stated.

##### Federal

Federal tax brackets and rates

| 2021 Brackets               | Rates |
|-----------------------------|-------|
| First \$49,020              | 15%   |
| Over \$49,020 to \$98,040   | 20.5% |
| Over \$98,040 to \$151,978  | 26%   |
| Over \$151,978 to \$216,511 | 29%   |
| Over \$216,511              | 33%   |

Alberta

No changes

## Alberta tax brackets and rates

| 2021 Brackets               | Rates |
|-----------------------------|-------|
| First \$131,220             | 10%   |
| Over \$131,220 to \$157,464 | 12%   |
| Over \$157,464 to \$209,952 | 13%   |
| Over \$209,952 to \$314,928 | 14%   |
| Over \$314,928              | 15%   |

British Columbia

## British Columbia tax brackets and rates

| 2021 Brackets               | Rates  |
|-----------------------------|--------|
| First \$42,184              | 5.06%  |
| Over \$42,184 to \$84,369   | 7.7%   |
| Over \$84,369 to \$96,866   | 10.5%  |
| Over \$96,866 to \$117,623  | 12.29% |
| Over \$117,623 to \$159,483 | 14.7%  |
| Over \$159,483 to \$222,420 | 16.8%  |
| Over \$222,420              | 20.5%  |

Manitoba

## Manitoba tax brackets and rates

| 2021 Brackets             | Rates  |
|---------------------------|--------|
| First \$33,723            | 10.8%  |
| Over \$33,723 to \$72,885 | 12.75% |
| Over \$72,885             | 17.4%  |

New Brunswick

New Brunswick tax brackets and rates

| 2021 Brackets               | Rates  |
|-----------------------------|--------|
| First \$43,835              | 9.68%  |
| Over \$43,835 to \$87,671   | 14.82% |
| Over \$87,671 to \$142,534  | 16.52% |
| Over \$142,534 to \$162,383 | 17.84% |
| Over \$162,383              | 20.3%  |

Newfoundland & Labrador

Newfoundland & Labrador tax brackets and rates

| 2021 Brackets               | Rates |
|-----------------------------|-------|
| First \$38,081              | 8.7%  |
| Over \$38,081 to \$76,161   | 14.5% |
| Over \$76,161 to \$135,973  | 15.8% |
| Over \$135,973 to \$190,363 | 17.3% |
| Over \$190,363              | 18.3% |

Northwest Territories

Northwest Territories tax brackets and rates

| 2021 Brackets              | Rates  |
|----------------------------|--------|
| First \$44,396             | 5.9%   |
| Over \$44,396 to \$88,796  | 8.6%   |
| Over \$88,796 to \$144,362 | 12.2%  |
| Over \$144,362             | 14.05% |

Nova Scotia

No change

## Nova Scotia tax brackets and rates

| 2021 Brackets              | Rates  |
|----------------------------|--------|
| First \$29,590             | 8.79%  |
| Over \$29,590 to \$59,180  | 14.95% |
| Over \$59,180 to \$93,000  | 16.67% |
| Over \$93,000 to \$150,000 | 17.5%  |
| Over \$150,000             | 21%    |

## Nunavut

## Nunavut tax brackets and rates

| 2021 Brackets              | Rates |
|----------------------------|-------|
| First \$46,740             | 4.0%  |
| Over \$46,740 to \$93,480  | 7.0%  |
| Over \$93,480 to \$151,978 | 9.0%  |
| Over \$151,978             | 11.5% |

## Ontario

## Ontario tax brackets and rates

| 2021 Brackets               | Rates  |
|-----------------------------|--------|
| First \$45,142              | 5.05%  |
| Over \$45,142 to \$90,287   | 9.15%  |
| Over \$90,287 to \$150,000  | 11.16% |
| Over \$150,000 to \$220,000 | 12.16% |
| Over \$220,000              | 13.16% |

## Prince Edward Island

No change

## Prince Edward Island tax brackets and rates

| 2021 Brackets             | Rates |
|---------------------------|-------|
| First \$31,984            | 9.8%  |
| Over \$31,984 to \$63,969 | 13.8% |
| Over \$63,969             | 16.7% |

## Quebec

## Quebec tax brackets and rates

| 2021 Brackets              | Rates  |
|----------------------------|--------|
| First \$45,105             | 15%    |
| Over \$45,105 to \$90,200  | 20%    |
| Over \$90,200 to \$109,755 | 24%    |
| Over \$109,755             | 25.75% |

## Saskatchewan

## Saskatchewan tax brackets and rates

| 2021 Brackets              | Rates |
|----------------------------|-------|
| First \$45,677             | 10.5% |
| Over \$45,677 to \$130,506 | 12.5% |
| Over \$130,506             | 14.5% |

## Yukon

## Yukon tax brackets and rates

| 2021 Brackets               | Rates |
|-----------------------------|-------|
| First \$49,020              | 6.4%  |
| Over \$49,020 to \$98,040   | 9.0%  |
| Over \$98,040 to \$151,978  | 10.9% |
| Over \$151,978 to \$500,000 | 12.8% |
| Over \$500,000              | 15.0% |

## Changes to taxes and rates

Effective January 1, 2021, the federal, provincial, and territorial personal tax credits that employees can claim are changing. These changes are reflected in the new federal, provincial, and territorial TD1 forms, and the Quebec TP-1015.3-V form.

### Federal and provincial basic personal amounts

| Provinces / Territories   | Basic Personal Amounts |
|---------------------------|------------------------|
| Federal                   | \$13,808               |
| Alberta                   | \$19,369               |
| British Columbia          | \$11,070               |
| Manitoba                  | \$9,936                |
| New Brunswick             | \$10,564               |
| Newfoundland and Labrador | \$9,536                |
| Northwest Territories     | \$15,243               |
| Nova Scotia               | \$11,481               |
| Nunavut                   | \$16,467               |
| Ontario                   | \$10,880               |
| PEI                       | \$10,500               |
| Quebec                    | \$15,728               |
| Saskatchewan              | \$16,225               |
| Yukon                     | \$13,808               |

## Indexing factors for 2021

The federal government, provinces, and territories have announced their indexing factors for 2021.

### Federal and provincial indexing factors

| Provinces / Territories | Indexing Factor |
|-------------------------|-----------------|
| Federal                 | 1.0%            |
| British Columbia        | 1.1%            |

| Provinces / Territories   | Indexing Factor |
|---------------------------|-----------------|
| Manitoba                  | 1.0%            |
| New Brunswick             | 1.0%            |
| Newfoundland and Labrador | 0.4%            |
| Northwest Territories     | 1.0%            |
| Nunavut                   | 1.0%            |
| Ontario                   | 0.9%            |
| Quebec                    | 1.26%           |
| Saskatchewan              | 1.0%            |
| Yukon                     | 1.0%            |

### Workers' Compensation Board Maximum Assessable Earnings for 2021

The maximum assessable earnings are as follows:

| Provinces / Territories   | Maximum Assessable Earnings |
|---------------------------|-----------------------------|
| Alberta                   | \$98,700.00                 |
| British Columbia          | \$100,000.00                |
| Manitoba                  | \$127,000.00                |
| New Brunswick             | \$67,100.00                 |
| Newfoundland and Labrador | \$67,985.00                 |
| Northwest Territories     | \$97,300.00                 |
| Nova Scotia               | \$64,500.00                 |
| Nunavut                   | \$97,300.00                 |
| Ontario                   | \$102,800.00                |
| PEI                       | \$55,300.00                 |
| Quebec                    | \$83,500.00                 |
| Saskatchewan              | \$91,100.00                 |



| Provinces / Territories | Maximum Assessable Earnings |
|-------------------------|-----------------------------|
| Yukon                   | \$91,930.00                 |

### Changes to the Canadian Pension Plan

For 2021, the maximum pensionable earnings for the Canada Pension Plan (CPP) has increased to \$61,600. The contribution rate for employees is 5.45%. An employee can contribute up to a maximum of \$3,166.45. The employer can contribute an amount equal to the total of the employee's contribution.

### Changes to the Quebec Pension Plan

In 2021, the maximum pensionable earnings has increased to \$61,600. The Quebec Pension Plan (QPP) contribution rate for employees is 5.9%. The maximum employee contribution to QPP for 2021 will be \$3,427.90. The employer's contribution is an amount equal to the total of the employee's contributions.

### Changes to Employment Insurance

For 2021, outside Quebec, premium rates will be 1.58%. The annual maximum insurable earnings will be \$56,300 for a maximum annual premium amount of \$889.54.

In Quebec, premium rates for employment insurance will be 1.18%, with the annual maximum insurable earnings at \$56,300. The maximum annual premium amount will be \$664.34.

### Changes to the Quebec Parental Insurance Plan

For 2021, the maximum Quebec Parental Insurance Plan (QPIP) insurable earnings amount will be \$83,500. The QPIP employee premium rate is 0.494%. The QPIP employer premium rate is 0.692%.

## Before you start processing payroll

- Review the new federal TD1 form and the TD1 form for your province or territory (or the TP 1015.3- V form for Québec) to become familiar with any changes.
- Provide your employees with the 2021 federal/provincial/territorial TD1 forms if they need to make changes to their personal claims.
- Adjust your employee records in Sage 50 Accounting to reflect the new tax credit amounts.

## Preparing for payroll after tax changes

This section describes what you need to adjust in Sage 50 Accounting after tax changes become effective.

### Step 1: Adjust employees' federal personal tax credit claims

To adjust the federal personal tax credit claims, follow these steps:

1. If an employee's personal claim amount has changed, this employee must complete the new federal TD1 form.
2. Close all Employee Records windows in Sage 50 Accounting.
3. From the Home window, choose the Maintenance menu, then Update Employee Claims.
4. Select Federal to indicate you are updating the federal tax credits.
5. From the list, select all or only those employees you want to modify.
6. To update the basic personal amounts, click Update Basic Personal Amount.
7. To update the indexed amounts from the federal TD1 form, do one of the following:
  - Select Factor and enter the factor by which the claim amount will increase.
  - Select Amount and enter the amount by which the claim amount will increase. If you need guidance in calculating this amount, see [Indexation Guidelines](#).
8. To update the non-indexed amounts from the federal TD1 form, enter the amount changes in the Non-Indexed Amounts column for each employee.

## Step 2: Adjust employees' provincial (or territorial) personal tax credit claims

To adjust the provincial/territorial claims, follow these steps:

1. If an employee's personal claim amount has changed, the employee must complete the new provincial or territorial TD1 form (or TP 1015.3 V form, for Québec).
2. Close all Employee Records windows in Sage 50 Accounting.
3. From the Home window, choose the Maintenance menu, then Update Employee Claims.
4. Select Provincial to indicate you are updating the provincial or territorial tax credits and then the province or territory that you want to make changes for.
5. From the list, select all or only those employees you want to modify.
6. To update the basic personal amounts, click Update Basic Personal Amount.
7. To update the indexed amounts from the provincial or territorial TD1 form, do one of the following:
  - Select Factor and enter the indexing factor by which the claim amount will increase.
  - Select Amount and enter the amount by which the claim amount will increase. If you need guidance in calculating this amount, see [Indexation Guidelines](#).
8. To update the non-indexed amounts from the federal TD1 form, enter the amount changes in the Non-Indexed Amounts column for each employee.

## Indexation Guidelines

In Sage 50 Accounting there are two fields on the Taxes tab of the Employees Record window which hold the employee's claim amounts that are subject to indexing:

- Federal Other Indexed Amounts
- Provincial Other Indexed Amounts

## Calculate the federal claim amount that is subject to indexing

From the Total Claim Amount of the federal TD1 form, subtract the items that are not subject to indexing. Currently, the personal tax credit amounts on the federal TD1 form that are not subject to indexing are:

- Pension Income Amount
- Tuition and Education Amount (full time)
- Tuition and Education Amount (part-time)
- Pension Income, Tuition, and Education Amounts Transferred from Spouse or Dependant

For provincial claims, some provincial and territorial governments have set their own indexation requirements. For example, in Alberta and Ontario, all personal tax credit amounts are subject to indexing.

Because indexation requirements vary from jurisdiction to jurisdiction, and are subject to change, you should review the indexation requirements set by the federal, provincial or territorial governments before entering the employee's Federal (or Provincial) claim subject to indexing field.

# Sage 50 Accounting—Canadian Edition (Release 2021.0)

This product update covers all product solutions of Sage 50 Accounting (Release 2021.0) and includes the updates from previous releases.

## What's new and product improvements

### New features and product enhancements

|   | Pro | Premium | Quantum |
|---|-----|---------|---------|
| <b>Improvements for Sage 50</b>   |     |         |         |
| <b>Never miss an update</b><br><br>Your News Feed can be seen by clicking on the “bell” icon in the top navigation on your home window. Here you’ll have quick access to important communications, such as product updates, support alerts, and more. | Yes | Yes     | Yes     |

## General Information about Product Updates and Product Upgrades

**Important!** Sage 50 Accounting product updates are only available to current subscribers of a Sage Business Care plan. Payroll updates and features are only available to current subscribers of a Sage Business Care plan with payroll tax table updates. If you do not know whether your subscription is current, or you need to sign up or renew your subscription, contact Customer Sales at 1-888-261-9610.

### How is Sage 50 Accounting updated?

- Automatically, using Sage 50 Accounting (recommended)
- Manually, using Sage 50 Accounting.
- By downloading the update from the Sage 50 website.
- If you have paid to receive a CD, by running the product update CD.

**Important!** Always back up your data before installing your product update, and before any major changes, such as before advancing the session date to a new calendar or fiscal year.

## How to automatically update Sage 50 Accounting

Sage 50 Accounting automatically checks for product updates whenever you are connected to the Internet. When an update is available, the update downloads in the background. When you close Sage 50 Accounting, you will be notified that an update is available to be installed. Click Yes to install it. You do not need to enter any information during the update process.

For more information, search for “Automatic Updates” in the Help.

## How to manually update Sage 50 Accounting

By default, “Automatic Updates” are turned on. We recommend that you keep this setting turned on. If you choose to turn off this option, you can always manually download the updates when you are connected to the Internet.

## Download product updates from the Sage 50 website

For your convenience, updates are also available on the [Sage 50 website](#). Please follow the installation instructions.

**Important!** Updating Sage 50 Accounting in a multi-user environment (Sage 50 Premium Accounting and higher)

- Install this product update on all computers running Sage 50 Accounting, including computers on which you have performed server-only type installations of Sage 50 Accounting.

## How to upgrade to Sage 50 Accounting

An upgrade of Sage 50 Accounting can involve one or more of the following changes:

- **Getting the latest version** - If you would like to get the latest updates offered for your current Sage 50 Accounting product, you can upgrade from an earlier version of Sage 50 Accounting.
- **Moving to a higher Sage 50 Accounting product** - If your business requires a richer set of accounting features, you can upgrade to the latest version of a higher Sage 50 Accounting product (for example, moving from Sage 50 Premium Accounting to Sage 50 Quantum Accounting). This option also upgrades your version of Sage 50 Accounting if you are not already using the latest version of the program.
- **Adding more user licences** - If you want to increase the number of concurrent users in Sage 50 Accounting, you can upgrade your program to allow more users. If required, this option also upgrades your version and moves you to a higher Sage 50 Accounting product at the same time.

For any of these scenarios or for more information about upgrading your Sage 50 Accounting solution, contact Customer Sales at 1-888-261-9610.