

S A G E 5 0 0 E R P 2 0 2 1

# **Release Notes**

**Version 8.10.7**

**Product Update 7**

Sage Software, Inc.

## **Acknowledgments**

Information in this document is furnished only under a Customer License Agreement or non-disclosure agreement, and may be used or copied only in accordance with the terms of such agreement. The software described in this document is protected by copyright and may not be copied on any medium except as specifically authorized in the license or non-disclosure agreement.

This document is also protected by copyright, and may not be reproduced or transmitted, in whole or in part, by any means, including photocopying, facsimile transmission, or reduction to any electronic medium or machine-readable form, without the express written consent of Sage Software, Inc.

Copyright 2024 Sage Software, Inc.

All rights reserved.

Sage 500 ERP is a registered trademark of Sage Software, Inc. Other product names used in this document are trademarks or registered trademarks of their respective owners.

## Contents

|                                    |    |
|------------------------------------|----|
| Disclaimer .....                   | 4  |
| Enhancements and Corrections ..... | 4  |
| * Product Update 7 .....           | 7  |
| Product Update 6 .....             | 8  |
| Product Update 5 .....             | 9  |
| Product Update 4 .....             | 10 |
| Product Update 3 .....             | 11 |
| Product Update 2 .....             | 12 |
| Product Update 1 .....             | 13 |
| Installation Instructions .....    | 14 |
| Installing the Server .....        | 14 |
| Installing the Client .....        | 20 |

## Disclaimer

Any prior customizations may be altered or overwritten upon installation of this product update. The user assumes all responsibility for corruption or loss of data.

## Enhancements and Corrections

The following is a list of enhancements and corrections that have been incorporated into this Sage 500 ERP 2021 Product Update.

**\*Indicates a new enhancement or program fix in this Update. All new to Product Update 7 have been consolidated under one section "Product Update 7".**

### Enhancements

---

**Enhancement:** Visual Process Flow changed to not use Flash

Visual Process Flows have been updated to remove the use of Flash. A result of the change may be that your internally defined Process Flows may be misaligned or text may not be visible depending on how they were defined and how they will display in the new HTML5 layouts. You may need to edit them to get them looking the way you want.

Refer to Issue ID 50571 below.

Available: Product Update 1

**\* Enhancement:** This July 2024 PU enhancement allows a user to restrict the entries that appear in the grid for the 1099 Beginning Balances application. By default, all tax years and forms were appearing. Filters were added to allow the grid to be pared down for editing should the need arise. This is expected to help out users who make a lot of beginning balance entries as part of their 1099 processing.

Available: Product Update 7

1099 Beginning Balances

Filters  
 Tax Year  Tax Form    
 Showing (all) (all)

| Vendor  | Year | Form     | Box | Beginning Balance |
|---------|------|----------|-----|-------------------|
| Smith,J | 2008 | Misc     | *7  | 777.00            |
| Smith,J | 2009 | Dividend | 1a  | 2,009.00          |
| Smith,J | 2010 | Interest | 1   | 2,010.00          |
| Tophat  | 2005 | Interest | 1   | 2,005.00          |
| Tophat  | 2023 | NEC      | 1   | 2,023.00          |
|         |      |          |     |                   |

admin SOA 6/30/2008

After applying a filter for Tax Year 2010, the application would then show only those entries for Tax Year 2010.

1099 Beginning Balances

Filters

Tax Year  Tax Form

Showing 2010 (all)

| Vendor  | Year | Form     | Box | Beginning Balance |
|---------|------|----------|-----|-------------------|
| Smith,J | 2010 | Interest | 1   | 2,010.00          |
|         |      |          |     |                   |

admin SOA 6/30/2008

## \* Product Update 7

| Issue ID | Module | Short Description  | Objects Modified - Client  | Object Modified - Database  |
|----------|--------|--|--|---|
| 50775    | AP     | 1099 Beginning Balances - Enhance to include filtering capabilities  | apzdn001.frm,<br>apzdn002.frm,<br>LocalizationConst.bas,<br>APZDN001.exe | spAPTempVend1099Bal.sql,<br>CreateLocalMsg_100445.sql,<br>CreateLocalMsg_100446.sql |
| 50761    | AP     | Process Credit Card Transfer uses the full voucher amount instead of the remaining balance of the Voucher already partially paid |  | spAPSelectVouchForCCPayment.sql   |
| 50764    | AP     | Printing Checks on RDP Session not using Session Default printer as selection  | apzra001.bas,<br>apzra001.exe,<br>apzrad1.dll                            |   |
| 50772    | SO     | Limit Number of Orders to Pick does not retain when saving a setting in Create Picklist  | selectpickline.frm,<br>SOSelectPickLine.dll                              |   |

## Product Update 6

| Issue ID | Module | Short Description  | Objects Modified - Client   | Object Modified - Database |
|----------|--------|--|---|----------------------------|
| 50475    | CM     | Error when deleting deposit batch: "Unable to determine status of batch usage"   | cmztl001.frm,<br>cmztl001.exe   |                            |
| 50750    | CC     | Manual Transaction does not work in Credit Card/EFT Transaction in Process Cash Receipts   | Constants.vb,<br>SE.vb,<br>Accounting.Application.CC.SE.dll   |                            |
| 50751    | CC     | "FAILED with the following error: URL or Network error." when doing a Test Connection in Maintain Processors Account.  | Constants.vb,<br>SE.vb,<br>Accounting.Application.CC.SE.dll   |                            |
| 50752    | CC     | System.Net.WebException. The request was aborted. Could not create SSL/TLS secure channel, at Accounting.Application.CC.SE.Get Settlements(String startDate, String endDate) at Accounting.Application.CC.Settlement.GetSettlements) when processi | App.config,<br>Accounting.Application.CC.Settlement.exe,<br>Accounting.Application.CC.Settlement.exe.config |                            |



## Product Update 5

---

| Issue ID | Module | Short Description  | Objects Modified - Client                              | Object Modified - Database  |
|----------|--------|--|--|---|
| 50697    | AP     | Usability - user can potentially lose the option to check the EFT file                       |  | Update kmsgAPGenFileSuccess<br>140498 message for overlapping<br>message box OK buttons.sql |
| 50717    | BA     | BI 2023 Analyzer View Headers are too dark to read   | Analyzer.vb,<br>Accounting.Application.BA.Analyzer.exe |   |
| 50678    | PO     | Open Sales Order already tagged to a PO is available for tagging again in Tag Purchase Order |  | sppoPopPOTagWrk.sql   |
| 50711    | SO     | Dropship SO does not appear in the 'Select Ship Line for Returns Lookup window               | SelectLines.frm,<br>SOLineSelectEng.dll                |   |

## Product Update 4

---

| Issue ID | Module | Short Description  | Objects Modified - Client    | Object Modified - Database   |
|----------|--------|--|------------------------------|--|
| 50689    | AP     | 1099 TY 2022 PU Update - v2021   | ap1099SvcAtx.frm             | spapProcess1099_TaxSvc.sql<br>spapSubmit1099_TaxSvc.sql<br>ap1099Update2022.sql (script) |
| 50660    | AR     | Realized Gain/Loss line should not show on Invoice Reprint form for non-US customers   | arztc001.rpt<br>arztc002.rpt |  |
| 50659    | AR     | AR Credit Memo doubles the amount after application and reprinting report  | arztc001.rpt                 |  |
| 50653    | DI     | v2021 Cannot Import Overapplied Receipts using Data Import Manager, getting Error:<br>"Application amount exceeds the outstanding balance of the apply to document." |                              | spARValPendCustPmtAppl.SQL   |

## Product Update 3

---

| Issue ID | Module | Short Description  | Objects Modified - Client  | Object Modified - Database                         |
|----------|--------|--|--|--|
| 50635    | PA     | Project Costs are not updated in Project Accounting when Vendor Return for the project is posted in Purchase Order |  | sppoPostRcpt.sql                                   |
| 50632    | AP     | 1099 TY 2021 Update  | ap1099FormsSvc.bas<br>ap1099SvcAtx.frm<br>ap1099FormsSvc.exe<br>ap1099FormsSvcLnch.dll | spapProcess1099_TaxSvc.sql<br>ap1099Update2021.sql |
| 50628    | SO     | Unable to pick Sales Order without Ship Via  | SelectPickLine.frm<br>SOSelectPickLine.dll   |  |

## Product Update 2

---

| Issue ID | Module | Short Description  | Objects Modified - Client                               | Object Modified - Database    |
|----------|--------|--|---|-------------------------------|
| 50586    | AP     | DataPorter doesn't work for 1099 tab at Maintain Vendors   | apzma001.frm,<br>apzma001.exe                           | VendorUpdateforDataPorter.sql |
| 50588    | AP     | Ability to edit Remit to Address for unpaid posted vouchers  | APZDA001.frm,<br>apzdad1.dll,<br>apzda001.exe           |                               |
| 50594    | AR     | AR Reverse Application task missing Finance Charge paid thru Cash Receipts   | Arzdp001.frm,<br>Arzdpd1.dll                            |                               |
| 50592    | CI     | "Invalid value" when entering an Account Number in Maintain Item Class   | Imzmi001.frm,<br>Imzmi001.exe                           |                               |
| 50536    | IM     | Running the On Hand Lot-Serial Report with Serial selected in the Sort group results in an error                               | IMZRJ001.rpt  |                               |
| 50603    | IM     | Add the opportunity to set a warning if Purchase Product Line (PPL) is not entered in Replenishment tab for Maintain Inventory | Imzmt001.frm,<br>LocalizationConst.BAS,<br>Imzmt001.exe | 50603_Local_Message.sql       |
| 50599    | MF     | Add Gross Profit amount and Markup percent on the Estimate Entry Totals tab  | mfzdu001.frm,<br>mfzdu001.exe                           |                               |
| 50610    | PO     | "Custom Field Required" error occurs when generating Purchase Order from a Sales Order   |   | ciUserFld.sql                 |

## Product Update 1

---

| Issue ID | Module | Short Description   | Objects Modified - Client  | Object Modified - Database   |
|----------|--------|---|--|------------------------------|
| 50542    | AR     | Other Memos do not auto display when first Memo set up is not set to Auto Display | arzda001.frm, ARZDADL1.dll<br>arzdd002.frm, arzddd1.dll<br>arzma001.frm, arzma001.exe<br>sozde001.frm, sozde001.exe<br>sozdf001.frm, sozdf001.exe<br>sozdj101.frm, sozdj101.exe<br>Sozdk003.frm, Sozdk003.exe<br>sozdr001.frm, sozdr001.exe,<br>sozdrdl1.dll |                              |
| 50574    | AR     | Sales Tax Exempt number missing from Sales Tax Report for recurring invoices      |  | spARCreateInvFromRecur.sql   |
| 50570    | FrmWrk | Visual Process Flow Change to not use Flash                                       | VisualProcessAdapter.cs,<br>Accounting.Framework.Visua<br>lProcessAdapter.dll  | VisualProcessFlowCleanup.sql |
| 50579    | PO     | Error using lookup in Enter Requisitions  | pozde001.frm,<br>pozde001.exe  |                              |
| 50554    | SDK    | Error 13 Type Mismatch in PO Receipt of Goods                                     | pozdf002.frm,<br>pozdfd1.dll,<br>pozdfd2.dll   |                              |
| 50550    | SM     | BI Explorer View Filter Column Heading too dark and hard to read                  | SelectionControl.Designer.cs,<br>Accounting.Framework.Selec<br>tionControl.dll   |                              |
| 50532    | SO     | Error 'Item xxx is Inactive for the return warehouse ( )'                         | SelectLines.frm,<br>SOLineSelectEng.dll  |                              |

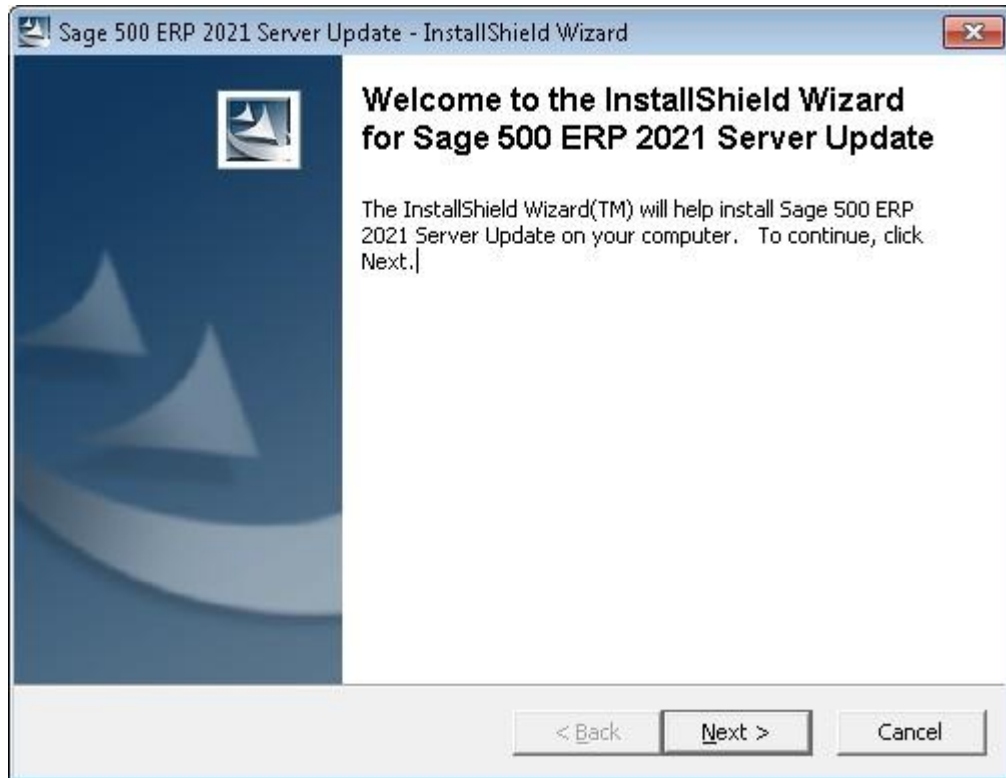
# Installation Instructions

---

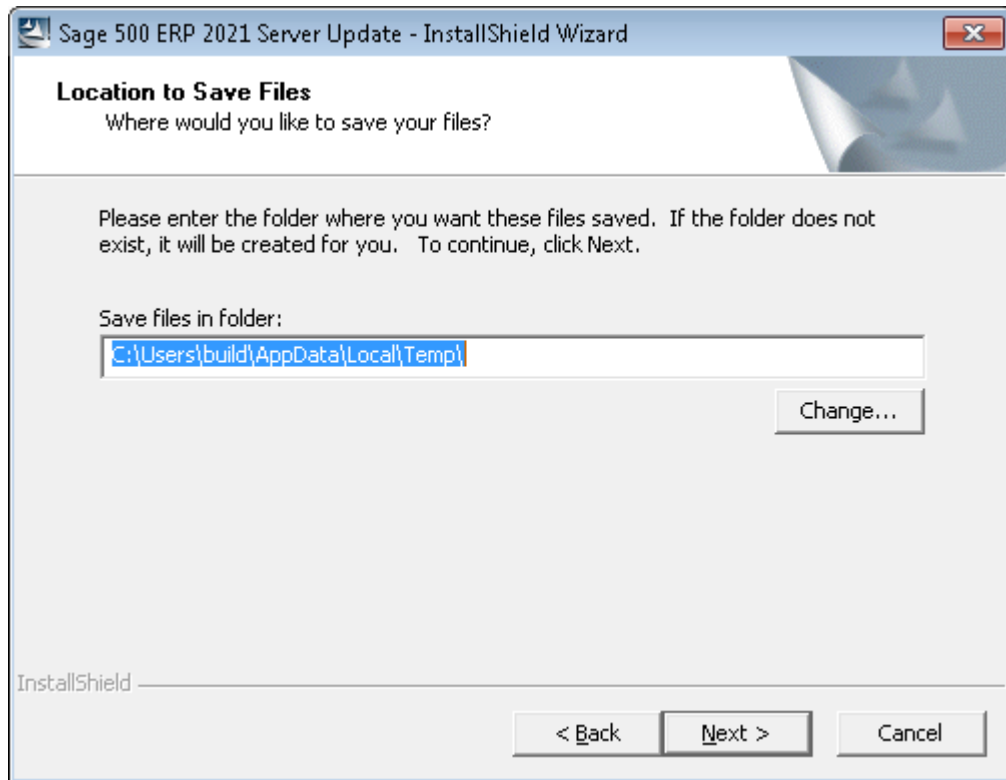
## Installing the Server

**Note: All users must log out of the Sage 500 ERP applications prior to installing the server update.**

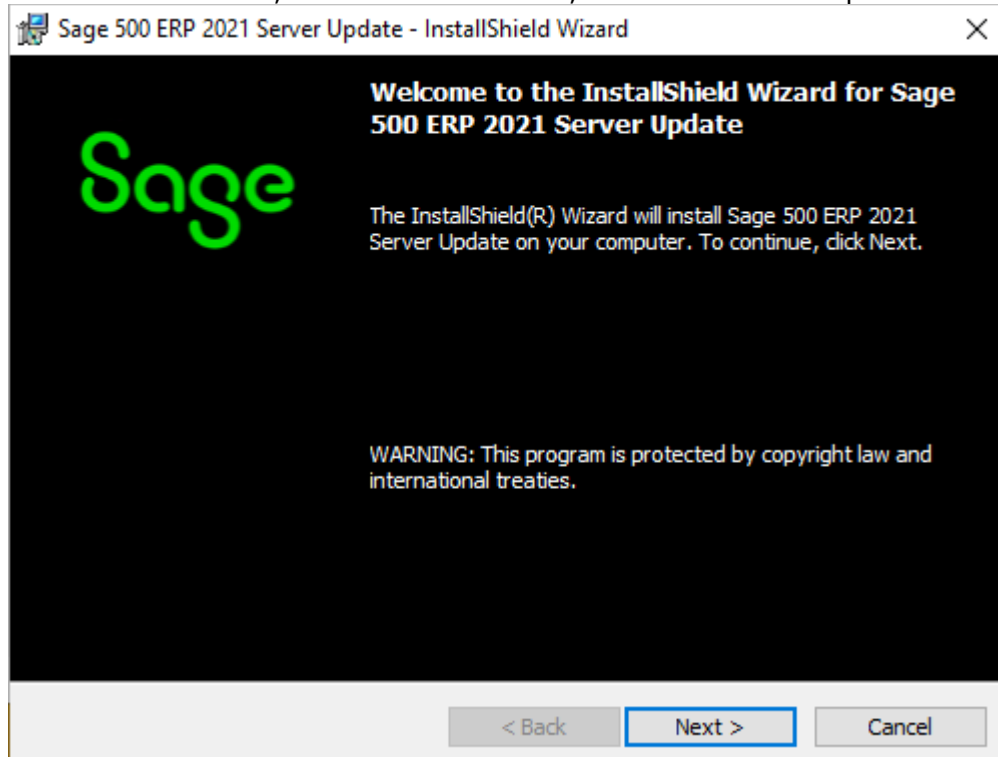
1. To begin the Sage 500 ERP 2021 Server installation, double-click **2021PU7S.exe** and click **Next** to proceed.



2. Indicate the location to which the installation files should be saved. Select the default location, or select **Change** to browse to a different location.



3. At the welcome screen, select **Next** to continue, or **Cancel** to exit setup.



4. Read the License Agreement, select the Accept option and click **Next** to continue.

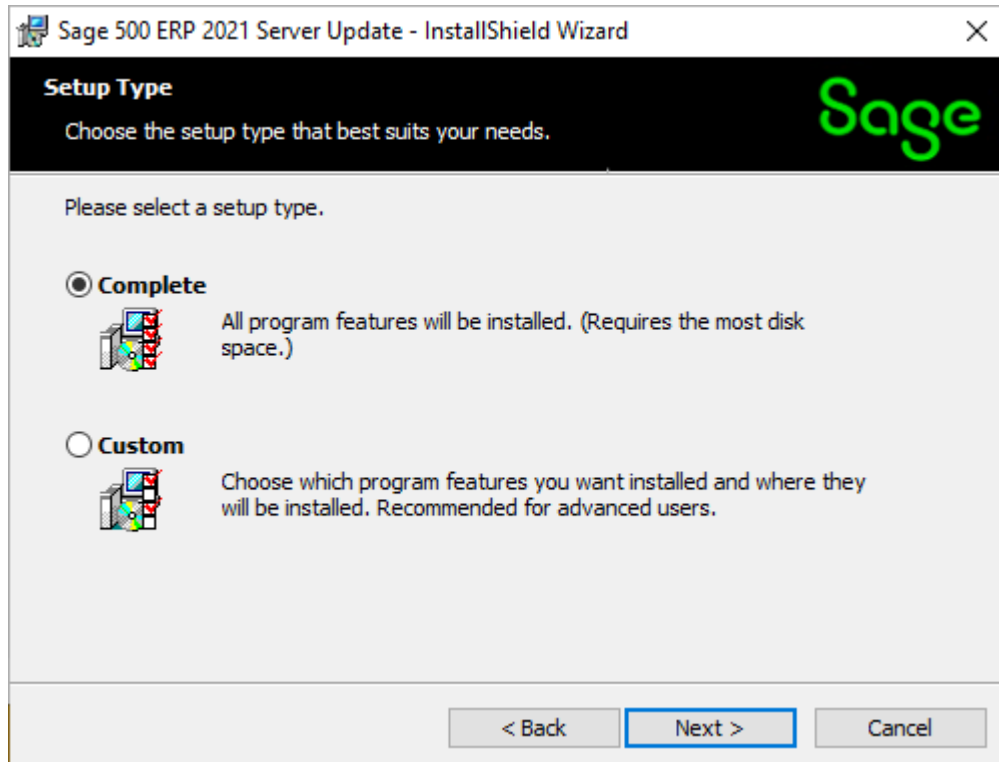
The screenshot shows a window titled "Sage 500 ERP 2021 Server Update - InstallShield Wizard". The window has a black header bar with the text "License Agreement" and "Please read the following license agreement carefully." on the left, and the Sage logo on the right. The main content area is titled "Sage End User License Agreement" and contains the following text: "This Agreement governs the use of the Software set forth in Customer's Order Form and any Service Plan Customer elects to purchase with respect to that Software." Below this is a paragraph of legal text: "BY DOING ONE OR MORE OF THE FOLLOWING (OR ALLOWING OR AUTHORIZING A THIRD PARTY TO DO SO ON CUSTOMER'S BEHALF), CUSTOMER SHALL BE DEEMED TO HAVE ACCEPTED AND ENTERED INTO THIS AGREEMENT WITH SAGE AND ANY ADDITIONAL TERMS AND CONDITIONS REQUIRED BY THIRD-PARTY PROVIDERS BY: (1) CLICKING 'AGREE,' 'OK', OR A SIMILAR AFFIRMATION THAT APPEARS DURING ACTIVATION OF THE SOFTWARE OR PRIOR TO THE USE OF THE SOFTWARE, (2)". At the bottom of the content area are two radio buttons: "I accept the terms in the license agreement" (unselected) and "I do not accept the terms in the license agreement" (selected). To the right of the radio buttons is a "Print" button. At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

5. Enter the User Name, Organization, and click **Next** to continue.

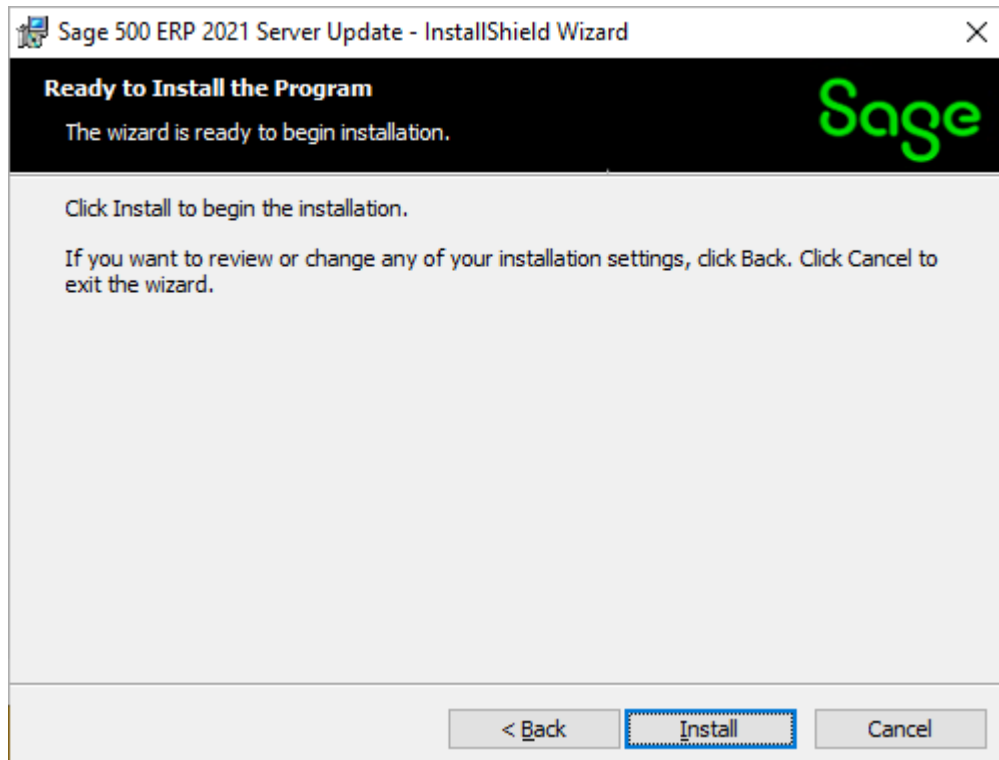
The screenshot shows a window titled "Sage 500 ERP 2021 Server Update - InstallShield Wizard". The window has a black header bar with the text "Customer Information" and "Please enter your information." on the left, and the Sage logo on the right. The main content area has two text input fields: "User Name:" with the text "Sage" entered, and "Organization:" with the text "Sage Software" entered. At the bottom of the window are three buttons: "< Back", "Next >" (highlighted with a blue border), and "Cancel".



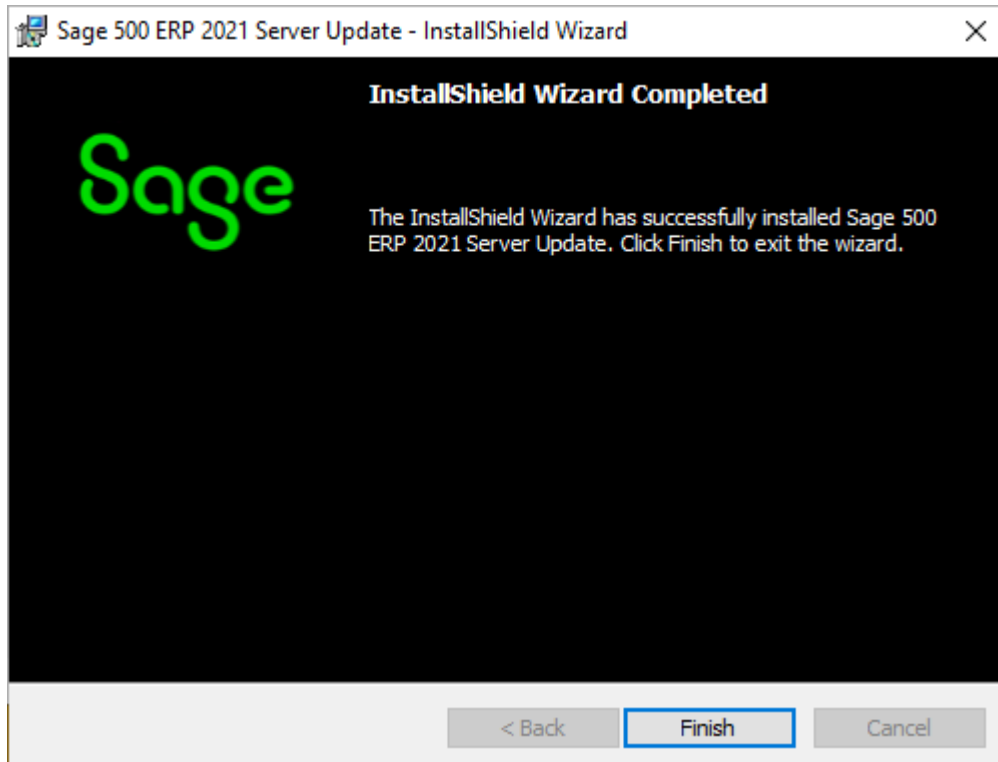
6. Select **Complete** and click **Next** to continue.



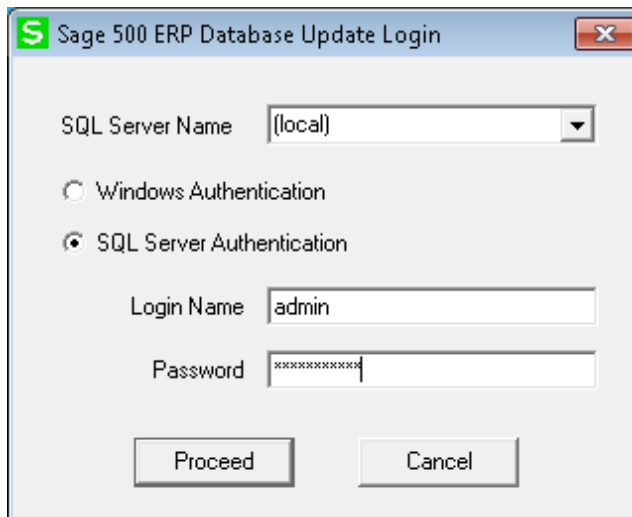
7. Click **Install** to continue.



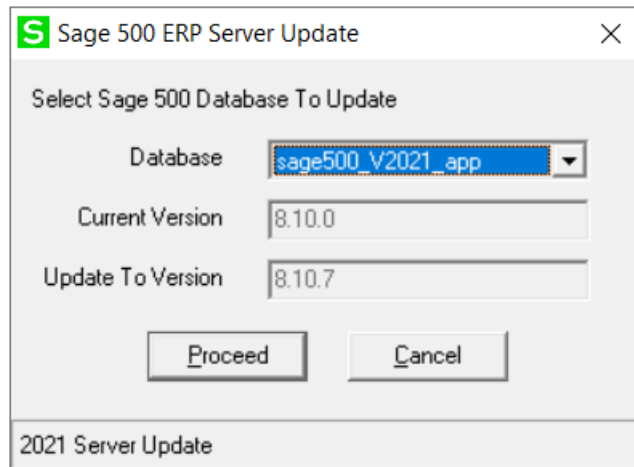
- At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.



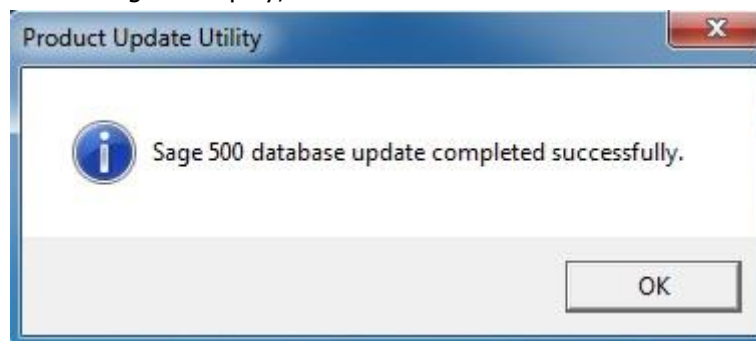
- If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2021 Product Update 7** from the Sage 500 ERP 2021 program group.
- Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.



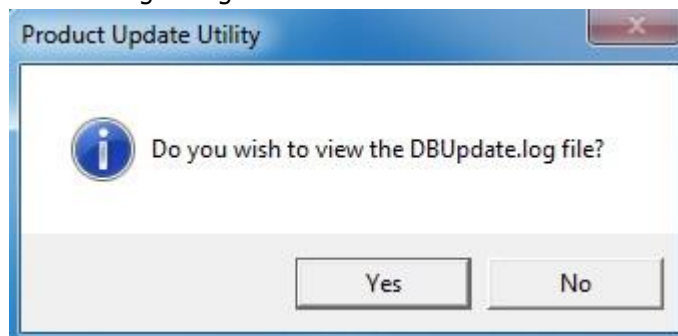
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.



12. This confirmation dialog will display; select **OK** to continue.

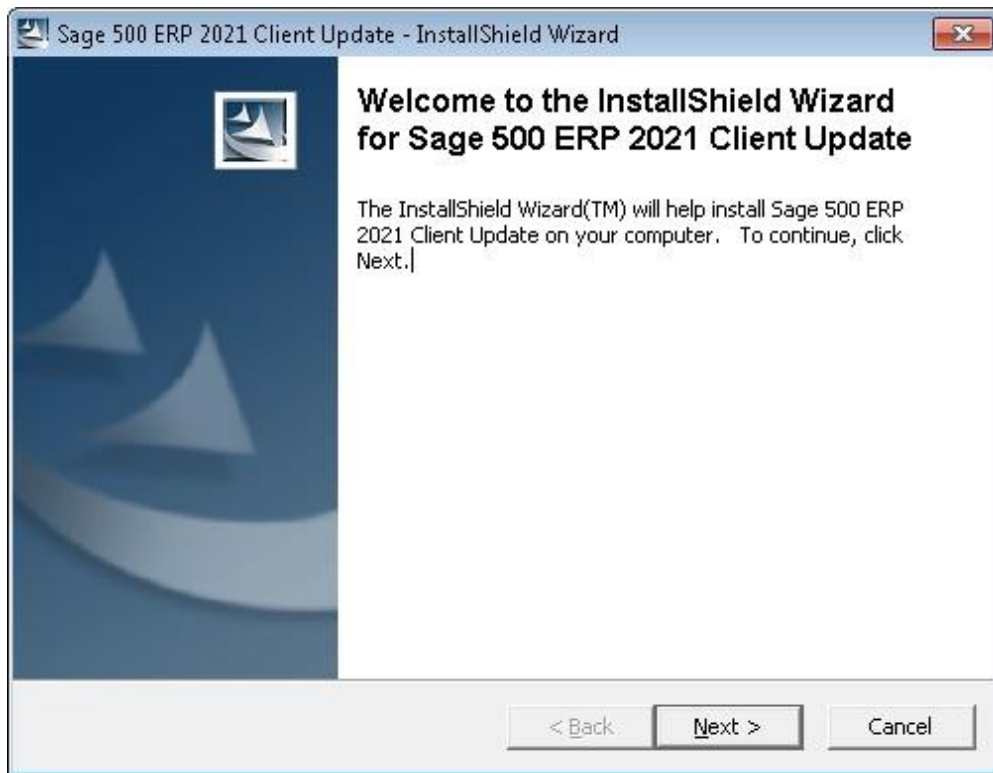


13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:

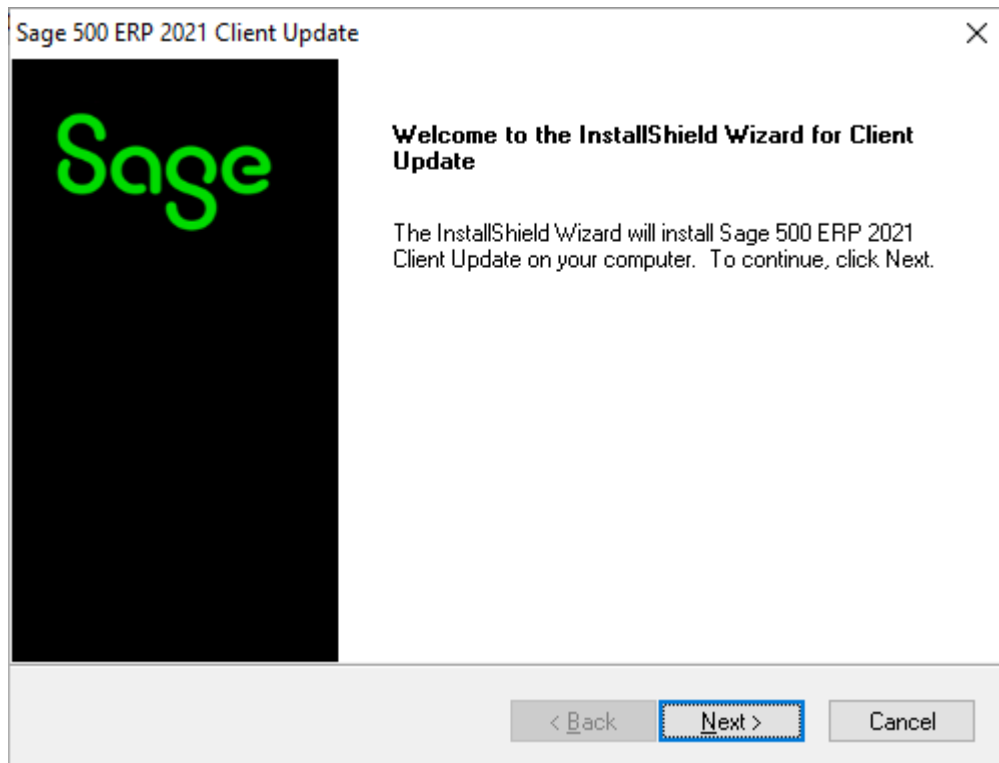


# Installing the Client

1. To begin the Sage 500 ERP 2021 Client installation, double-click the **2021PU7C.exe**. A screen similar to the one below will display, click **Next** to proceed.



2. At the Welcome screen, click **Next** to continue.



3. At the completion screen, click **Finish** to complete the Sage 500 ERP Client update installation.

