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

Release Notes

Version 8.10.8

Product Update 8

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.

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

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 8 have been consolidated under one section "Product Update 8".

Enhancements

* Enhancement: This January 2025 enhancement adds a vendor filter for the 1099 Beginning Balances application, expanding on the last PU enhancement. This will allow the user to potentially filter all beginning balance records for a specific vendor, or when combined with the other filters to reduce thousands of beginning balance records down to a single record that can then be viewed or edited as desired.
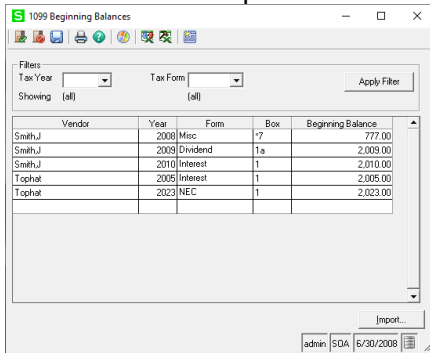Available: Product Update 8.
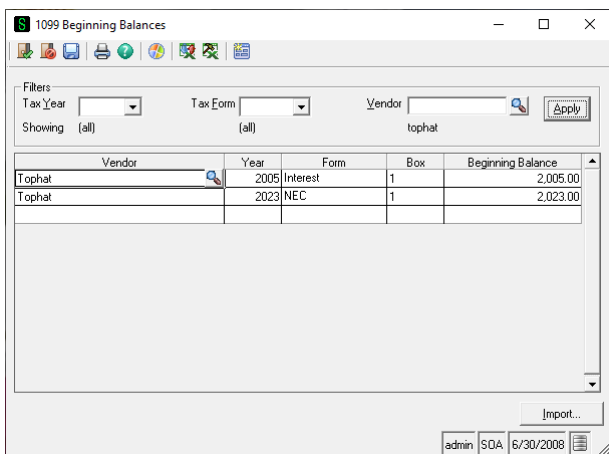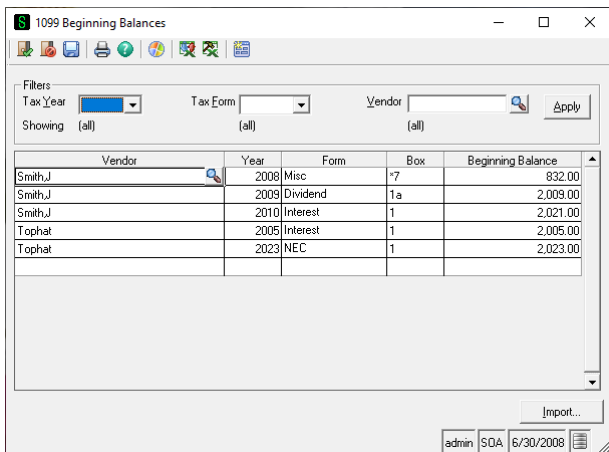
Enhancement: This July 2024 PU enhancement allows a user to restrict the entries that appear in the grid for the 1099 Beginning Balances application. By default, all tax years and forms were appearing. Filters were added to allow the grid to be pared down for editing should the need arise. This is

expected to help out users who make a lot of beginning balance entries as part of their 1099 processing.
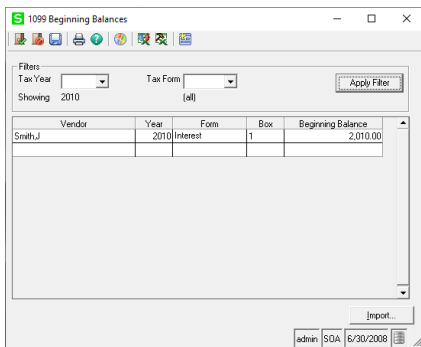Available: Product Update 7

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

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

* Product Update 8

| Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50790	AP	1099 Beginning Balances - Enhance to include vendor filtering capability	apzdn001.frm, apzdn002.frm, LocalizationConst.bas, APZDN001.exe	spAPTempVend1099Bal.sql, Create Local Msg_100445.sql, Create Local Msg_100446.sql
50815	AP	Update 1099 application to handle new Aatrix AESCrypto.dll	ap1099FormsSvcLnch.bas, ap1099SvcAtx.frm, ap1099FormsSvcLnch.dll, ap1099FormsSvc.bas, ap1099FormsSvc.frm, ap1099FormsSvc.exe	
50798	SM	CDO reference still in EMail and DocDist Projects	EmailUtils.vbp, EmailUtils.dll DocDistributionUtils.vbp, CDocDist.cls DocDistributionUtils.dll	
50810	SO	Sales Order Entry Screen closes after clicking Close (door) icon to close Inventory Status screen	imzqk001.frm, imzqk001.exe	
50821	IM	IM Global Price Group Change Export to Excel is not working on Office 365	ExcelServices.cls ExportUtil.dll	

SPECIAL NOTE:

If you do not utilize 1099 functionality within Sage 500 ERP then you can ignore this special note.

If you do utilize 1099 functionality within Sage 500 ERP then this note applies. This PU includes a 1099 update for Tax Year 2024. While there were no IRS driven 1099 changes, there are Sage 500 ERP program changes. ***In addition, there is a need to install a new version of the Sage 500 ERP Tax Forms Service for the tax year 2024.*** This is a Sage install for the Aatrix Software application that is utilized by Sage 500 ERP 1099 processing and is required to be installed regardless of your Sage 500 ERP version.

Trying to use 1099 functionality without uninstalling the old version of the Sage 500 ERP Tax Forms Service can lead to errors and is not supported by Sage or Aatrix Software.

You can check your version of the Sage 500 ERP Tax Forms Service by checking your Windows Apps & Features for the Sage 500 ERP Tax Forms Service to ensure it is at version 24.3.10 or greater.
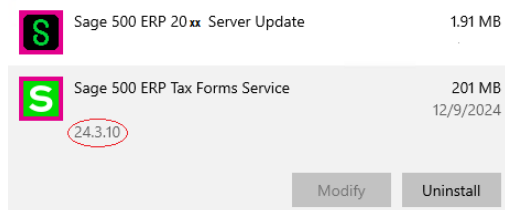
Please do not assume the auto-update functionality of the Sage 500 ERP Tax Forms Service that was used in the past will continue to work. Aatrix Software has updated their software to require a new version of the Sage 500 ERP Tax Forms Service to be installed and the previous version used since Tax Year 2016 to be uninstalled. Recall that this application should only be installed on the client that will actually process 1099 forms and need not be installed on any other clients.

The current version of the Sage 500 ERP Tax Forms Service can be obtained from the Sage Customer Portal.

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, apzdn002.frm, LocalizationConst.bas, APZDN001.exe	spAPTempVend1099Bal.sql, CreateLocalMsg_100445.sql, 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, apzra001.exe, apzradl1.dll	
50772	SO	Limit Number of Orders to Pick does not retain when saving a setting in Create Picklist	selectpickline.frm, 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, cmztl001.exe	
50750	CC	Manual Transaction does not work in Credit Card/EFT Transaction in Process Cash Receipts	Constants.vb, SE.vb, 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, SE.vb, 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.Settle ment.GetSettlements) when processi	App.config, Accounting.Application.CC.Settlement.exe, 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 140498 message for overlapping message box OK buttons.sql
50717	BA	BI 2023 Analyzer View Headers are too dark to read	Analyzer.vb, 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, 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 spapSubmit1099_TaxSvc.sql ap1099Update2022.sql (script)
50660	AR	Realized Gain/Loss line should not show on Invoice Reprint form for non-US customers	arztc001.rpt 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: "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 ap1099SvcAtx.frm ap1099FormsSvc.exe ap1099FormsSvcLnch.dll	spapProcess1099_TaxSvc.sql ap1099Update2021.sql
50628	SO	Unable to pick Sales Order without Ship Via	SelectPickLine.frm 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, apzma001.exe	VendorUpdateforDataPorter.sql
50588	AP	Ability to edit Remit to Address for unpaid posted vouchers	APZDA001.frm, apzdadl1.dll, apzda001.exe	
50594	AR	AR Reverse Application task missing Finance Charge paid thru Cash Receipts	Arzdp001.frm, Arzdpdl1.dll	
50592	CI	"Invalid value" when entering an Account Number in Maintain Item Class	Imzmi001.frm, 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, LocalizationConst.BAS, Imzmt001.exe	50603_Local_Message.sql
50599	MF	Add Gross Profit amount and Markup percent on the Estimate Entry Totals tab	mfzdu001.frm, 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 arzdd002.frm, arzdddl1.dll arzma001.frm, arzma001.exe sozde001.frm, sozde001.exe sozdf001.frm, sozdf001.exe sozdj101.frm, sozdj101.exe Sozdk003.frm, Sozdk003.exe sozdr001.frm, sozdr001.exe, sozdrdl1.dll	
50574	AR	Sales Tax Exempt number missing from Sales Tax Report for recurring invoices		spARCreateInvcFromRecur.sql
50570	FrmWrk	Visual Process Flow Change to not use Flash	VisualProcessAdapter.cs, Accounting.Framework.VisualProcessAdapter.dll	VisualProcessFlowCleanup.sql
50579	PO	Error using lookup in Enter Requisitions	pozde001.frm, pozde001.exe	
50554	SDK	Error 13 Type Mismatch in PO Receipt of Goods	pozdf002.frm, pozdfdl1.dll, pozdfdl2.dll	
50550	SM	BI Explorer View Filter Column Heading too dark and hard to read	SelectionControl.Designer.cs, Accounting.Framework.SelectionControl.dll	
50532	SO	Error 'Item xxx is Inactive for the return warehouse ( )'	SelectLines.frm, 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 **2021PU8S.exe** and click **Next** to proceed.
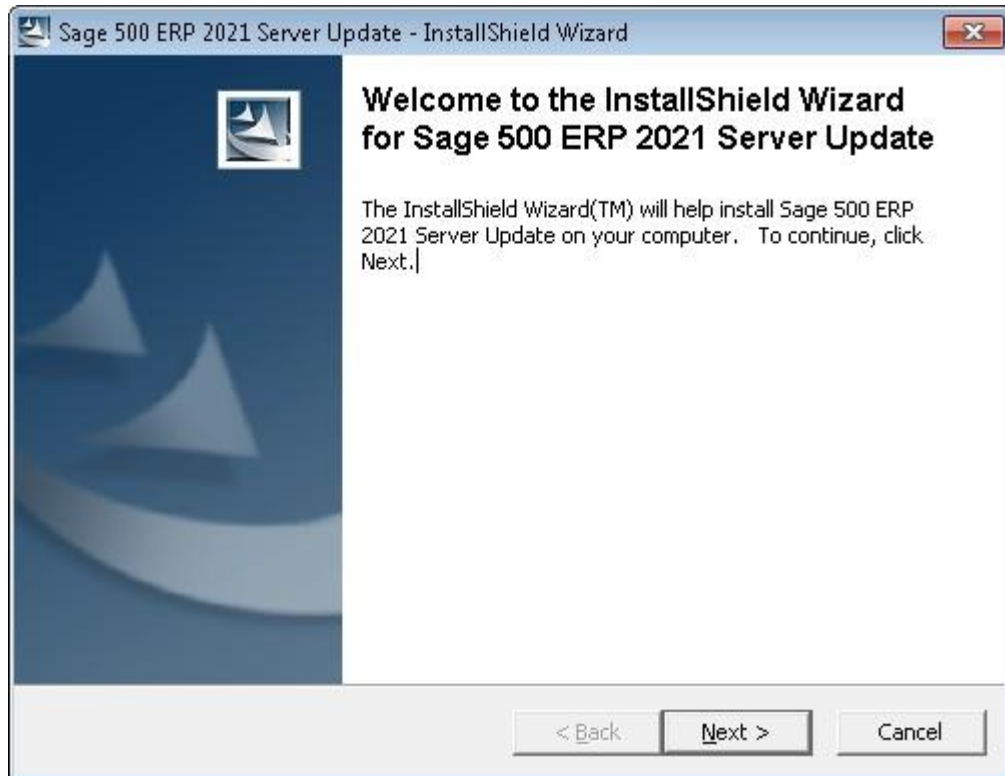
2. Indicate the location to which the installation files should be saved. Select the default location, or select **Change** to browse to a different location.
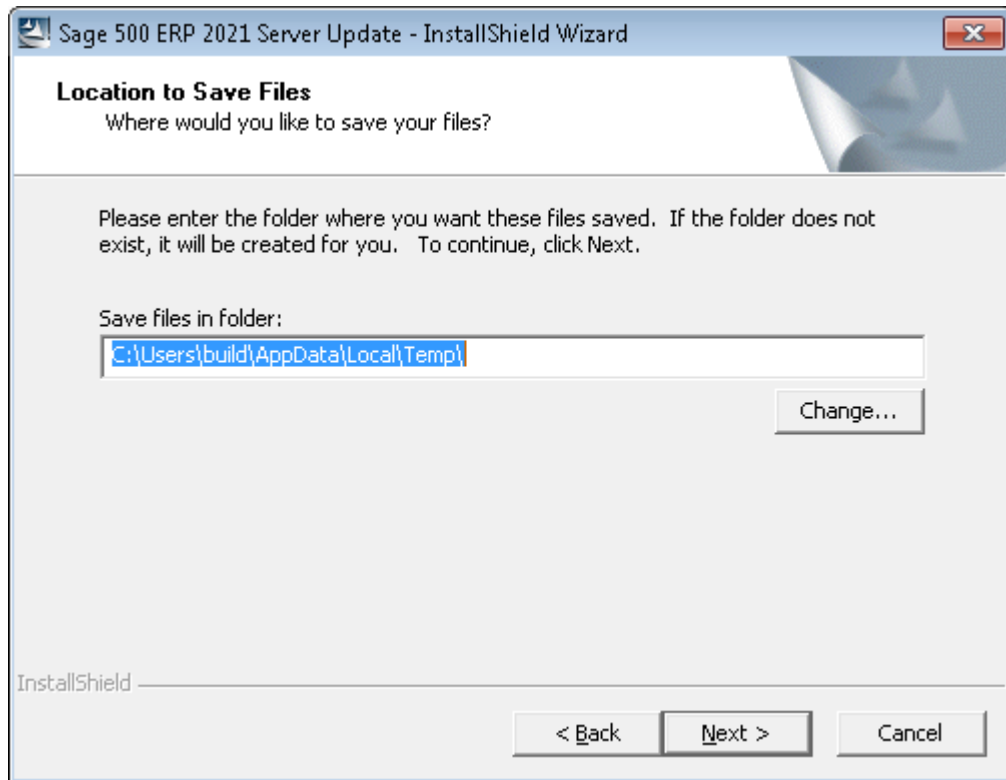
3. At the welcome screen, select **Next** to continue, or **Cancel** to exit setup.
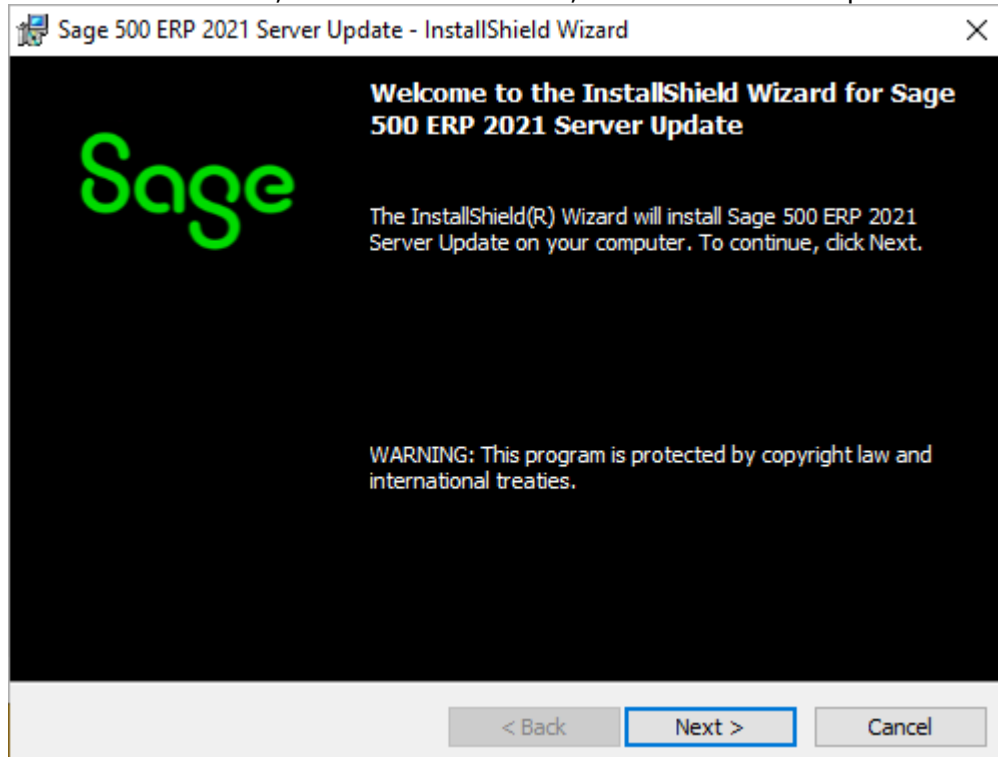
4. Read the License Agreement, select the Accept option and click **Next** to continue.

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

6. Select **Complete** and click **Next** to continue.
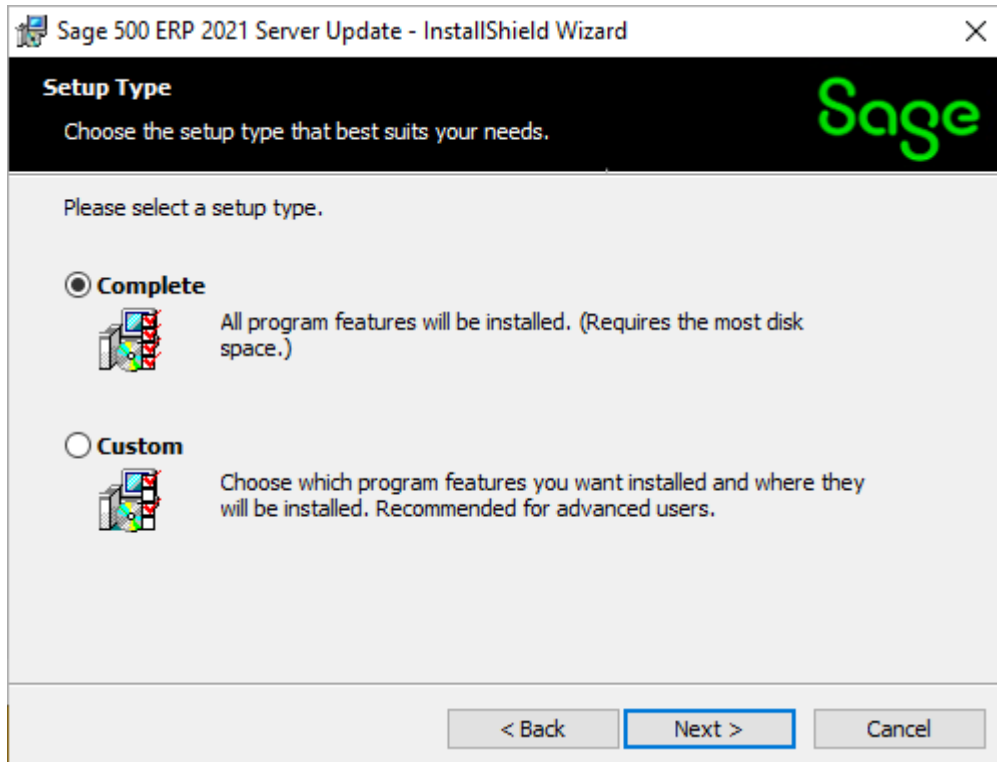
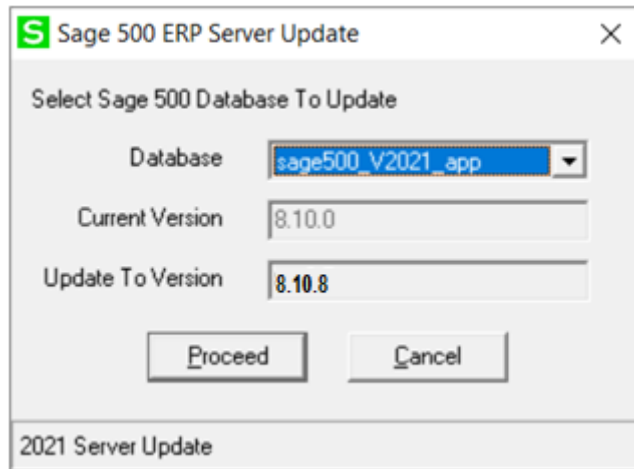7. Click **Install** to continue.
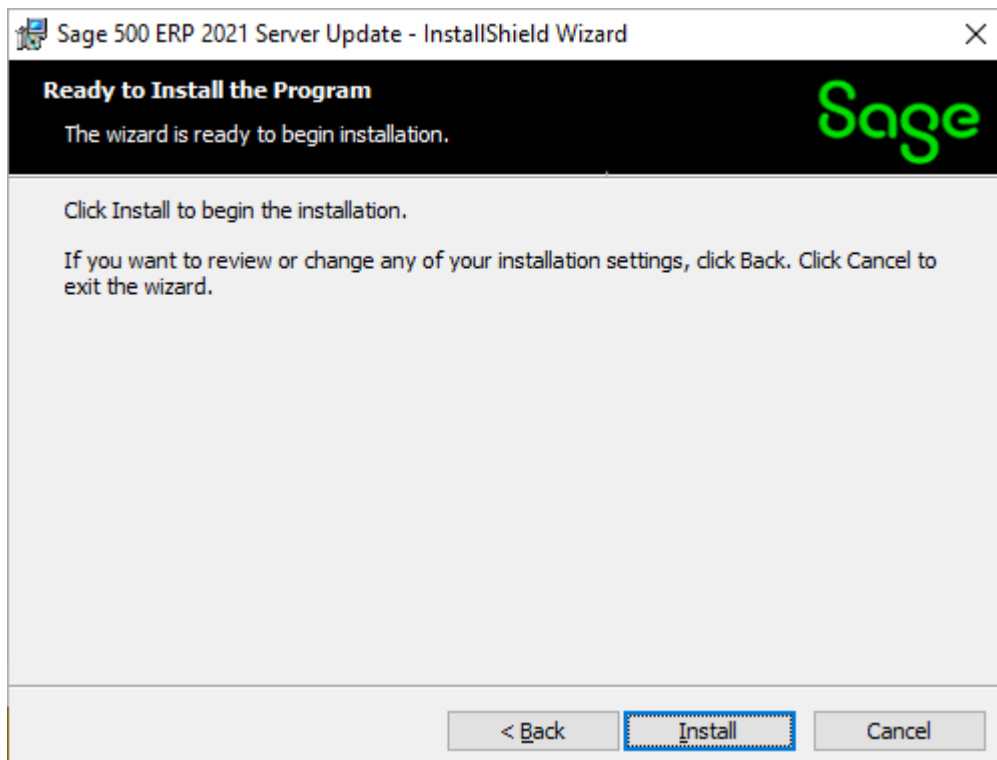
8. At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.
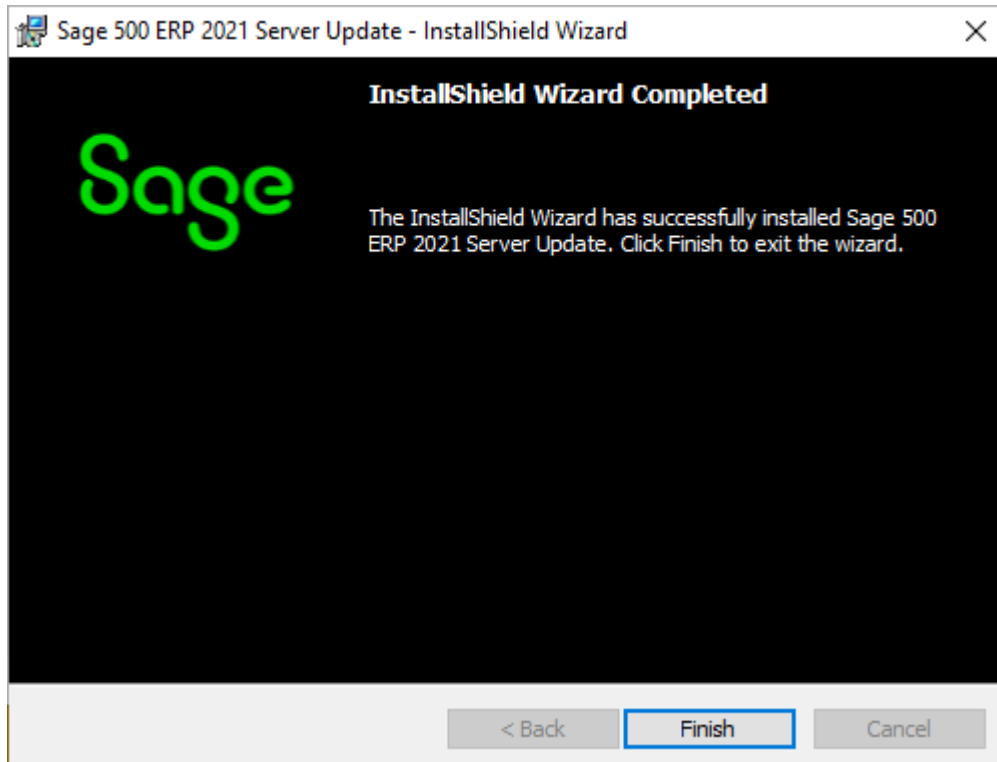
9. If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2021 Product Update 8** from the Sage 500 ERP 2021 program group.

10. Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.
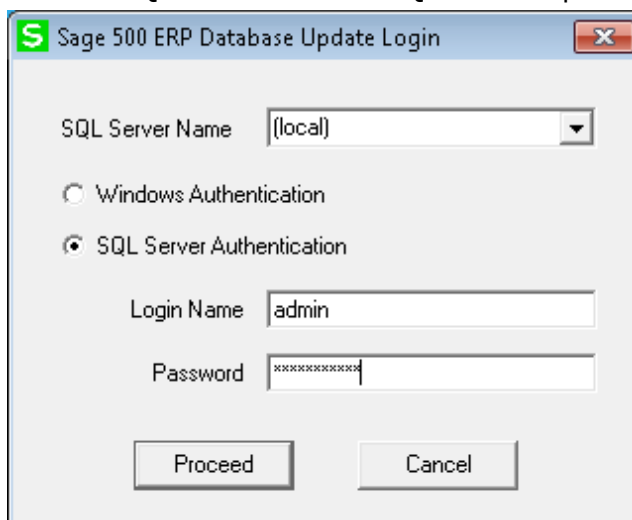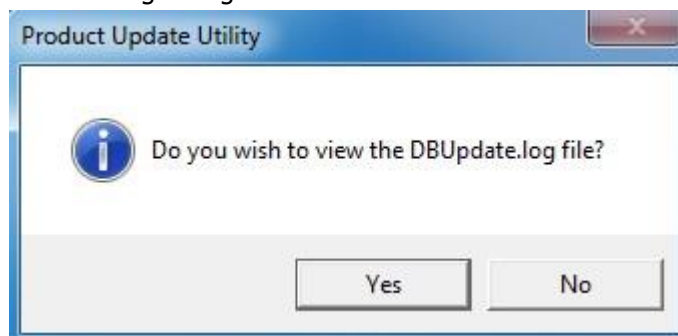
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.

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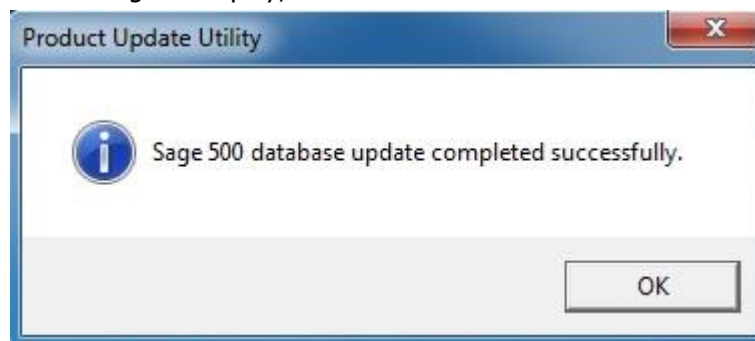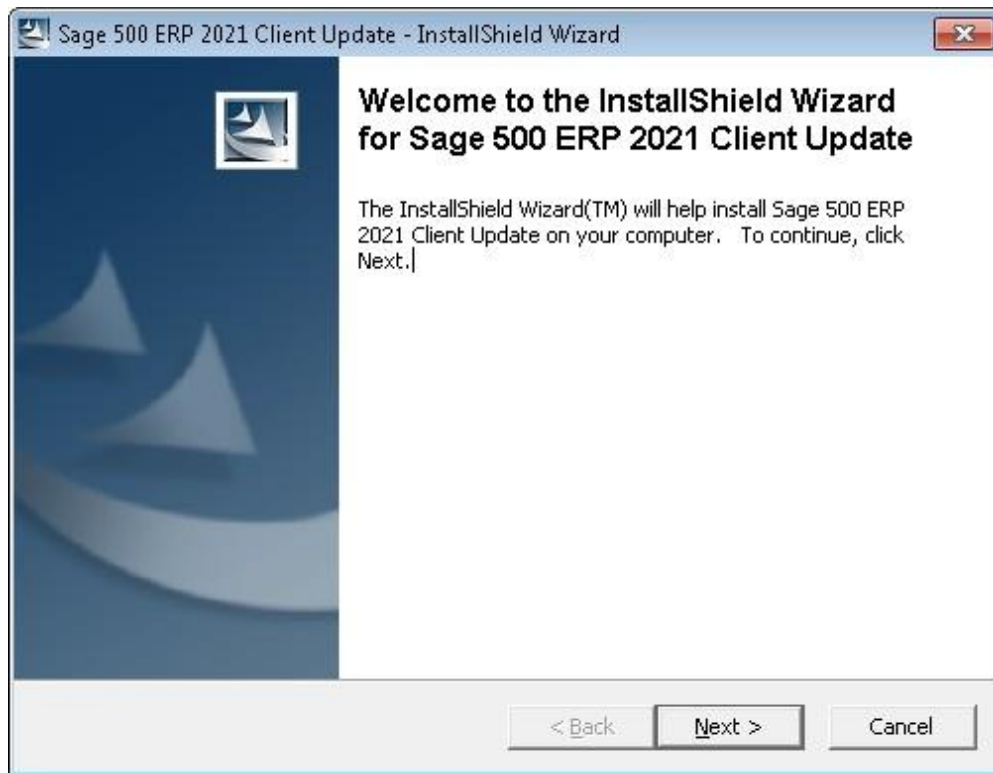

13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:
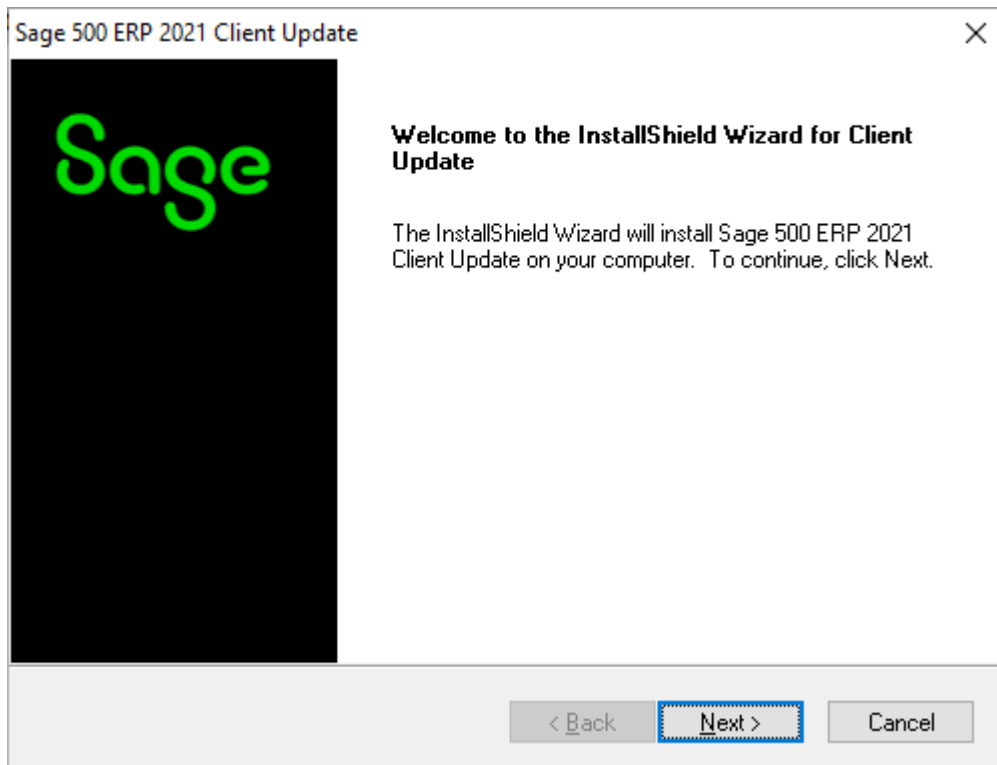
Installing the Client

1. To begin the Sage 500 ERP 2021 Client installation, double-click the **2021PU8C.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.