

S A G E 5 0 0 E R P 2 0 2 3

Release Notes

Version 8.20.4

Product Update 4

Sage Software, Inc.

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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

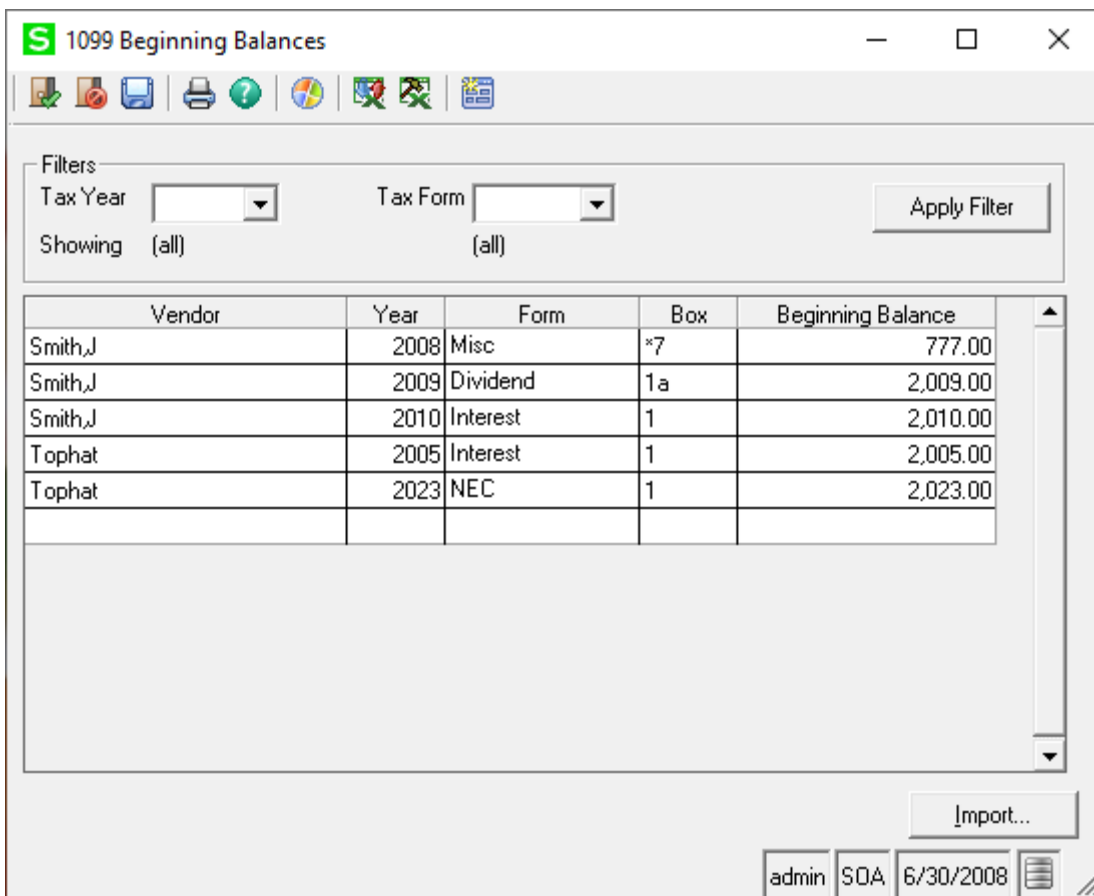
The following is a list of enhancements and corrections that have been incorporated into this Sage 500 ERP 2023 Product Update.

***Indicates a new enhancement or program fix in this Update. All new to Product Update 4 have been consolidated under one section "Product Update 4".**

Enhancements

*** 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 4



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

S 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 4

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50776	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
50766	AP	Process Credit Card Transfer uses the full voucher amount instead of the remaining balance of the Voucher already partially paid		spAPSelectVouchForCCPayment.sql
50763	AP	Printing Checks on RDP Session not using Session Default printer as selection	apzra001.bas, apzra001.exe, apzradl1.dll	
50771	SO	Limit Number of Orders to Pick does not retain when saving a setting in Create Picklist	selectpickline.frm, SOSelectPickLine.dll	

Product Update 3

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50725	PO	Address validation includes incorrect coding		poapiSTAddr.sql, poapi3.sql, poapi4.sql, spimGeneratePO.sql
50734	CM	Error when deleting deposit batch: "Unable to determine status of batch usage"	cmztl001.frm, cmztl001.exe	
50747	CC	Manual Transaction does not work in Credit Card/EFT Transaction in Process Cash Receipts	Constants.vb, SE.vb, Accounting.Application.CC.SE.dll	
50748	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	
50749	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, Accounting.Application.CC.Settlement.exe, Accounting.Application.CC.Settlement.exe.config	

Product Update 2

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50694	BA	BI 2023 Analyzer View Headers are too dark to read	Analyzer.vb, Accounting.Application.BA.Analyzer.exe	
50696	SO	The SO printing displays the "Ship To" address for all inventory line item.		spsCreateASalesOrder.sql
50698	AP	Usability - user can potentially lose the option to check the EFT file		Update kmsgAPGenFileSuccess 140498 message for overlapping message box OK buttons.sql
50701	SO	Error 13 - Type Mismatch when Copying a SO to another Customer		spsCreateASalesOrder.sql
50704	PO	Open Sales Order already tagged to a PO is available for tagging again in Tag Purchase Order		sppoPopPOTagWrk.sql
50712	SO	Dropship SO does not appear in the 'Select Ship Line for Returns Lookup window	SelectLines.frm, SOLineSelectEng.dll	

Product Update 1

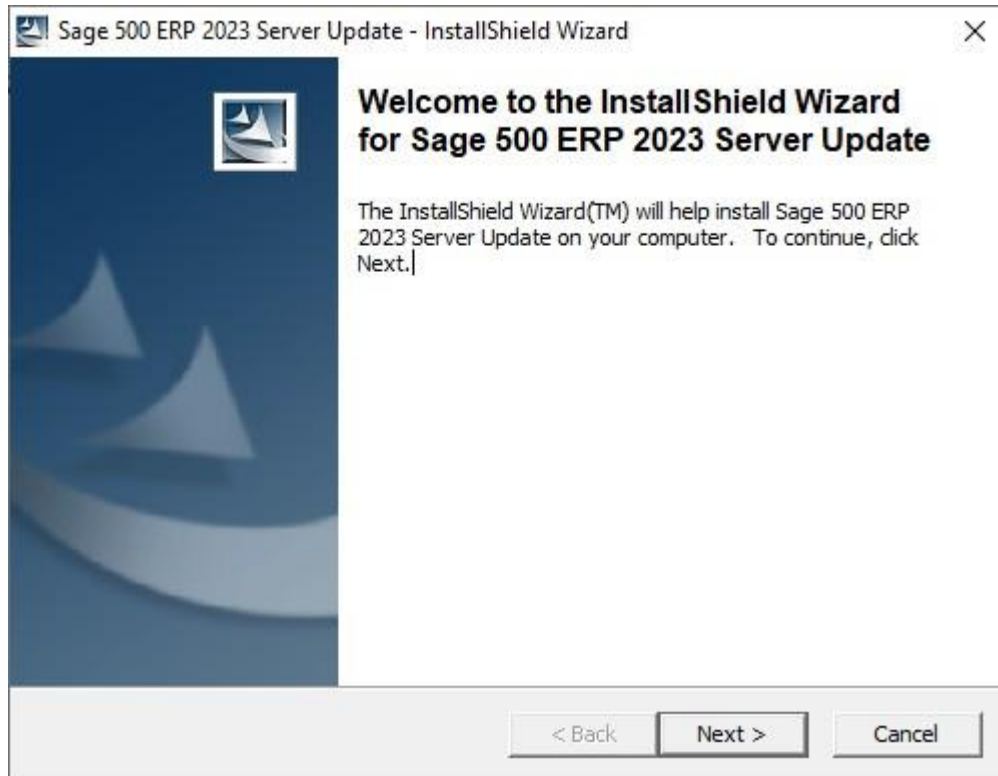
Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50688	AP	1099 TY 2022 PU Update - v2023	ap1099FormsSvcLnch\ap1099SvcAtx .frm	spapProcess1099_TaxSvc.sql spapSubmit1099_TaxSvc.sql ap1099Update2022.sql

Installation Instructions

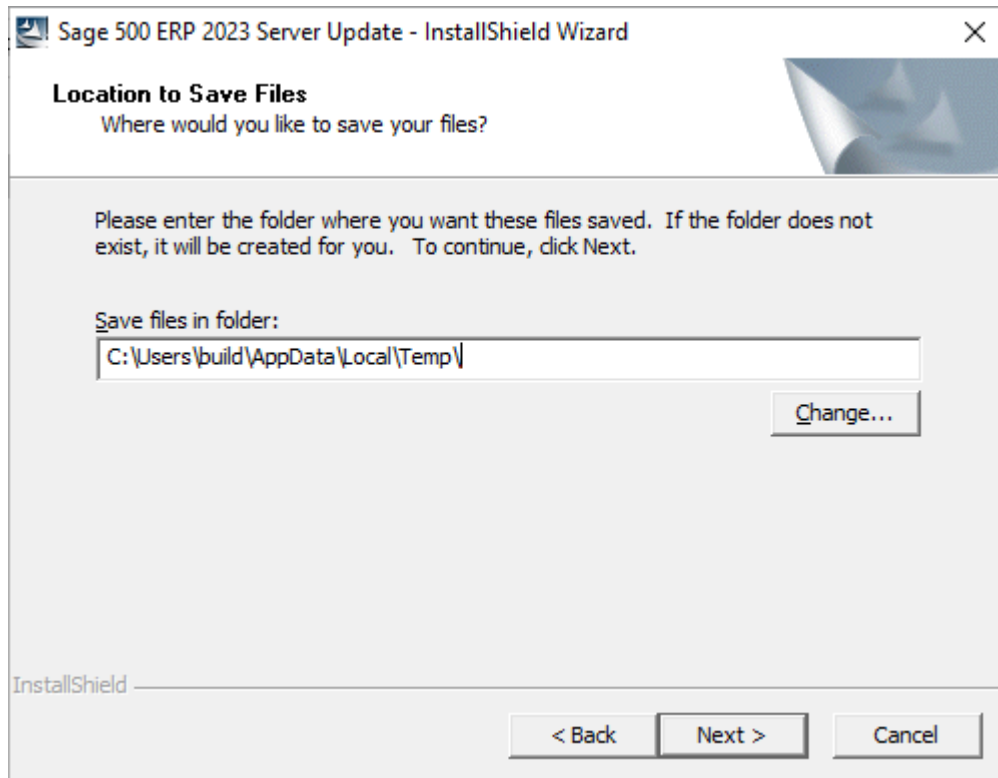
Installing the Server

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

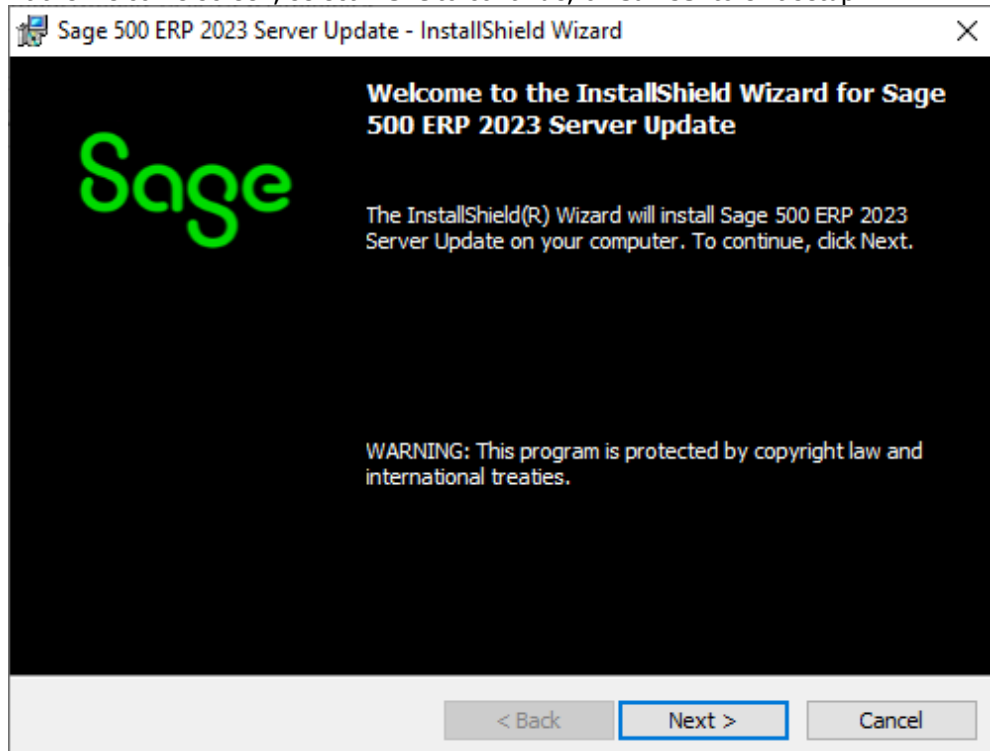
1. To begin the Sage 500 ERP 2023 Server installation, double-click **2023PU4S.exe** and click **Next** to proceed.



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.



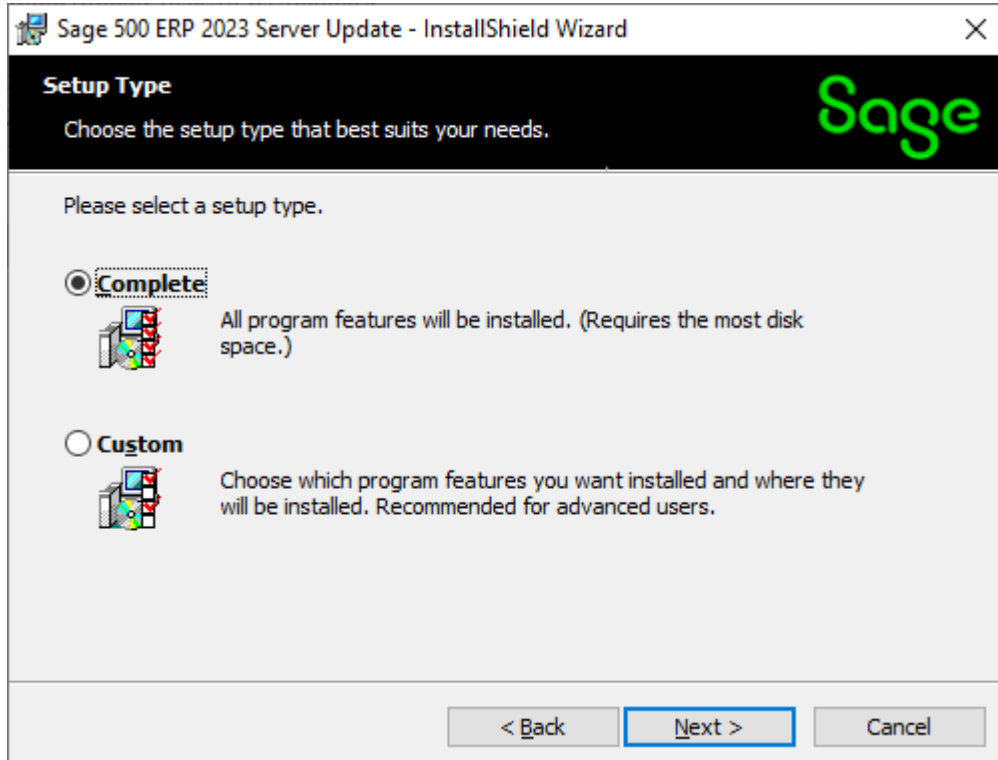
4. Read the License Agreement, select the Accept option and click **Next** to continue.

The screenshot shows a window titled "Sage 500 ERP 2023 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 a scrollable text box titled "Sage End User License Agreement". The text in the scroll box reads: "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." followed by a paragraph of legal terms: "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)". Below the scroll box are two radio button options: "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 these options is a "Print" button. At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

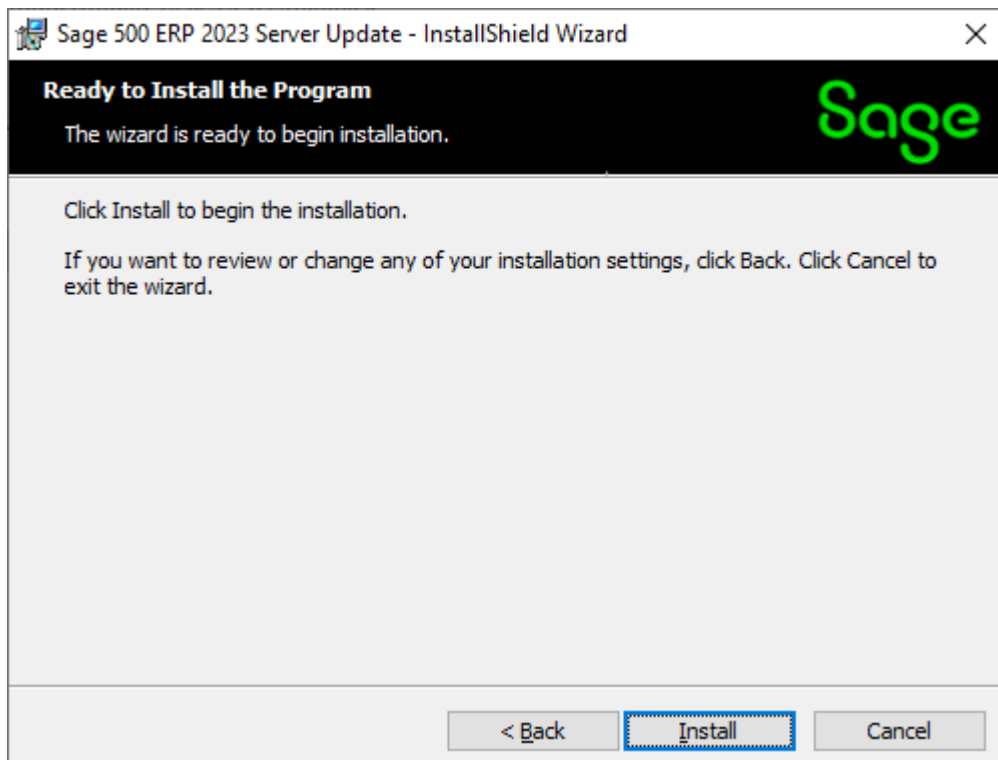
5. Enter the User Name, Organization, and click **Next** to continue.

The screenshot shows a window titled "Sage 500 ERP 2023 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 contains two text input fields. The first is labeled "User Name:" and contains the text "Administrator". The second is labeled "Organization:" and contains the text "Sage Software". At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

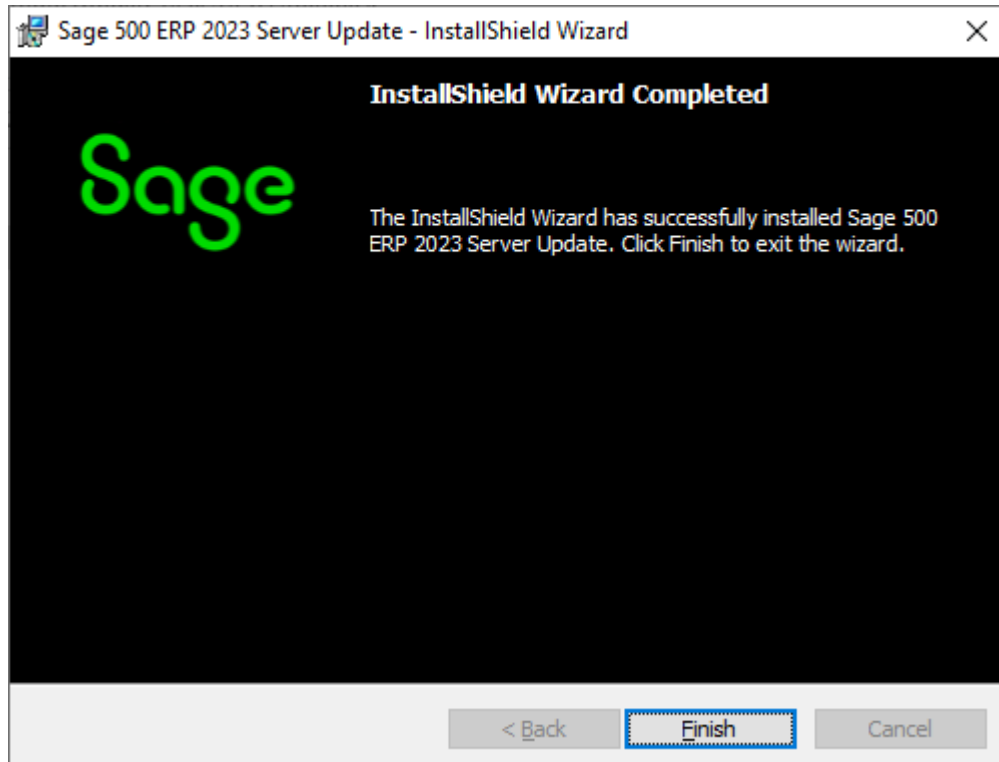
6. Select **Complete** and click **Next** to continue.



7. Click **Install** to continue.

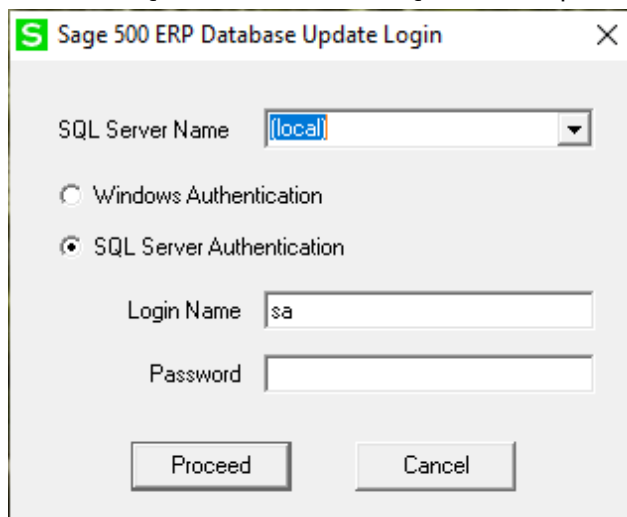


8. At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.

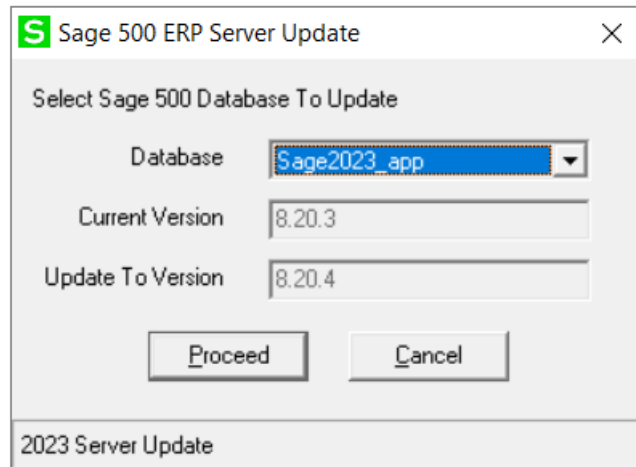


9. If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2023 Product Update 4** from the Sage 500 ERP 2023 program group.

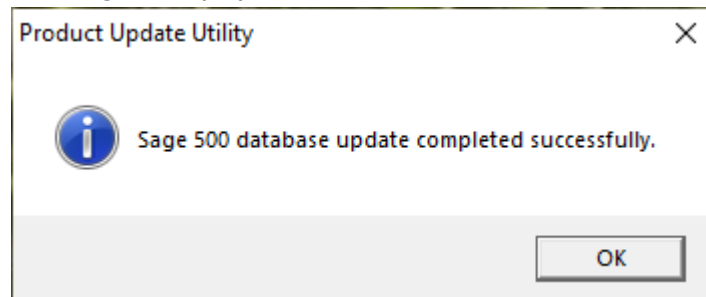
10. Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.



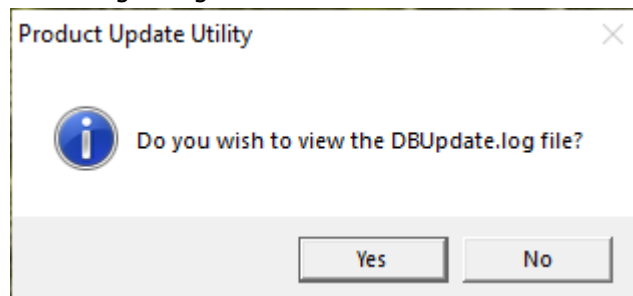
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.



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

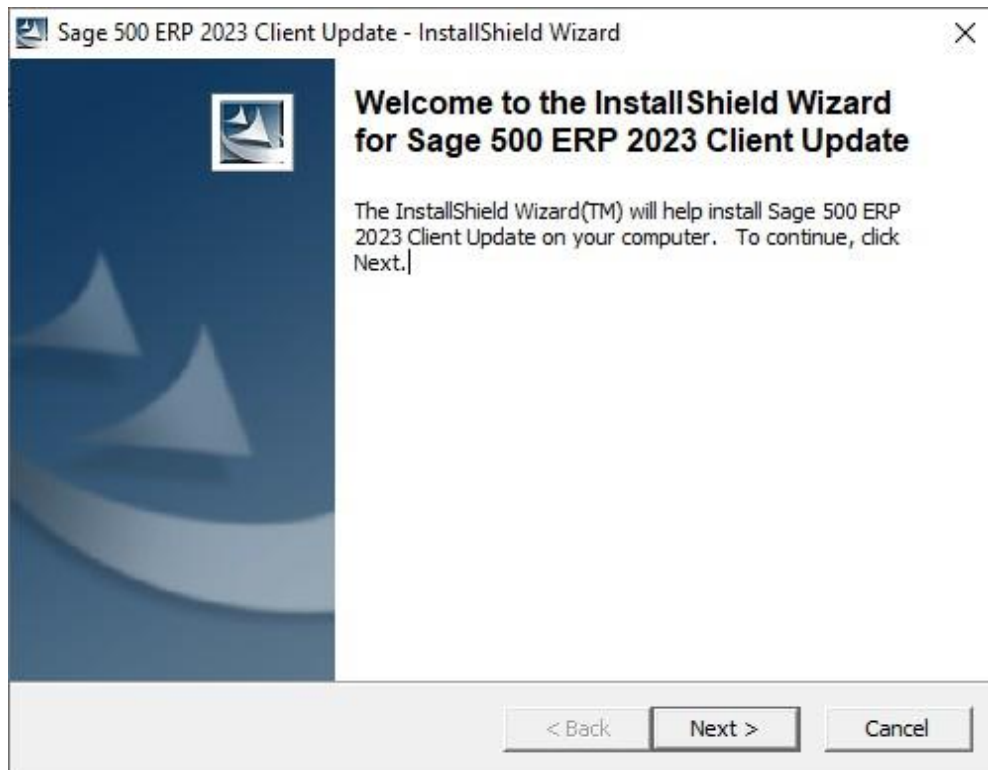


13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:

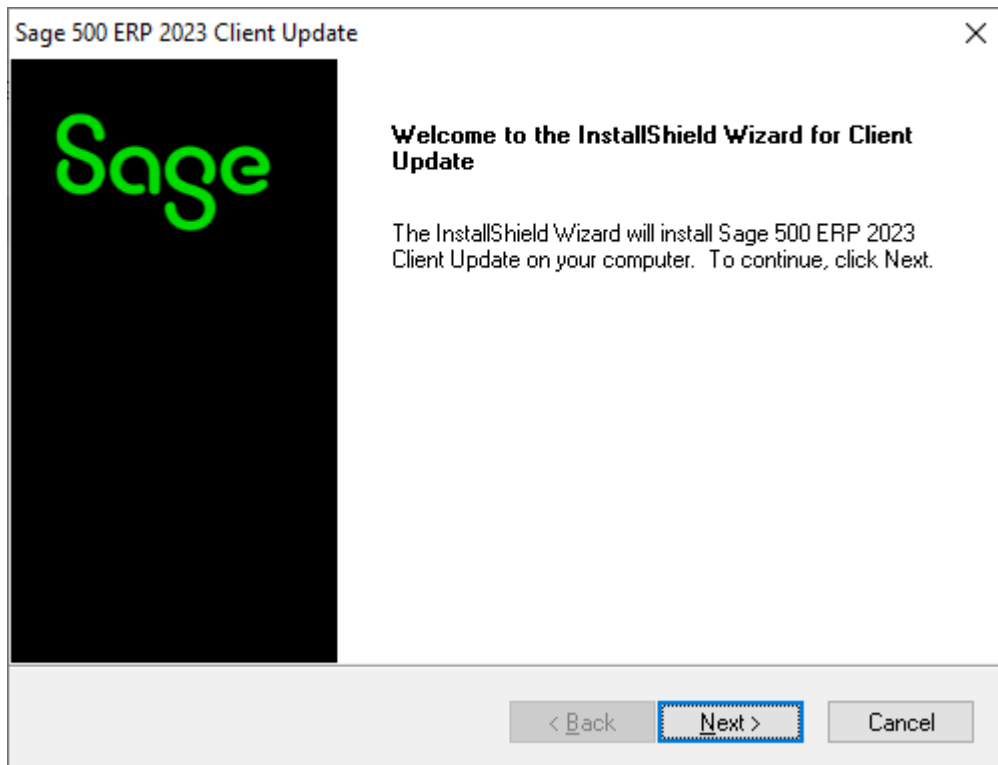


Installing the Client

1. To begin the Sage 500 ERP 2023 Client installation, double-click the **2023PU4C.exe**. A screen similar to the one below will display, click **Continue** 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.

