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Release Notes

Version 8.20.5

Product Update 5

Sage Software, Inc.

Acknowledgments

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 2023 Product Update.

*Indicates a new enhancement or program fix in this Update. All new to Product Update 5 have been consolidated under one section "Product Update 5".

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 5.
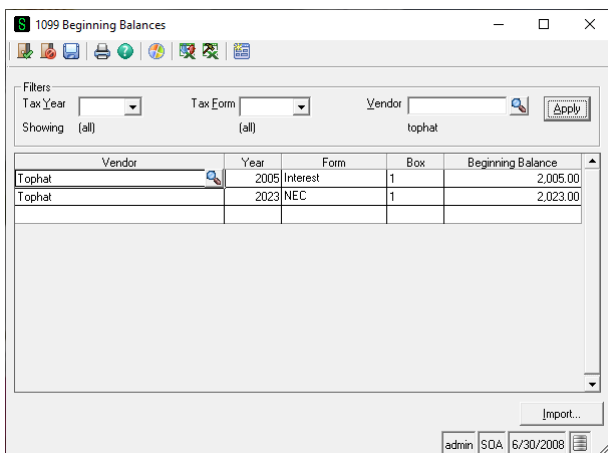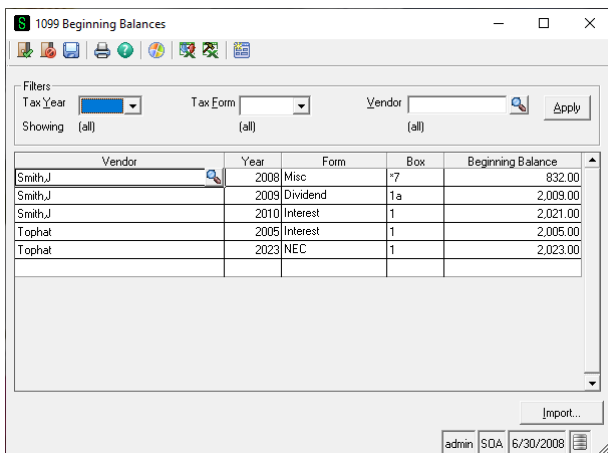
Enhancement: This July 2024 PU enhancement allows a user to restrict the entries that appear in the grid for the 1099 Beginning Balances application. By default, all tax years and forms were appearing. Filters were added to allow the grid to be pared down for editing should the need arise.

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
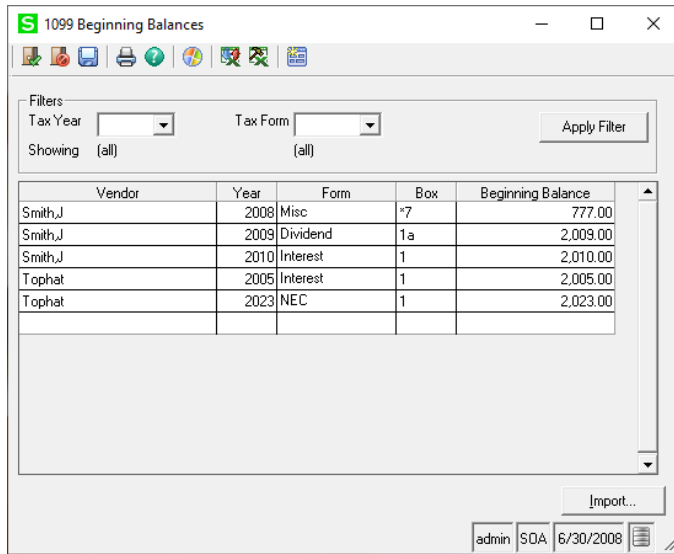
After applying a filter for Tax Year 2010, the application would then show only those entries for Tax Year 2010.
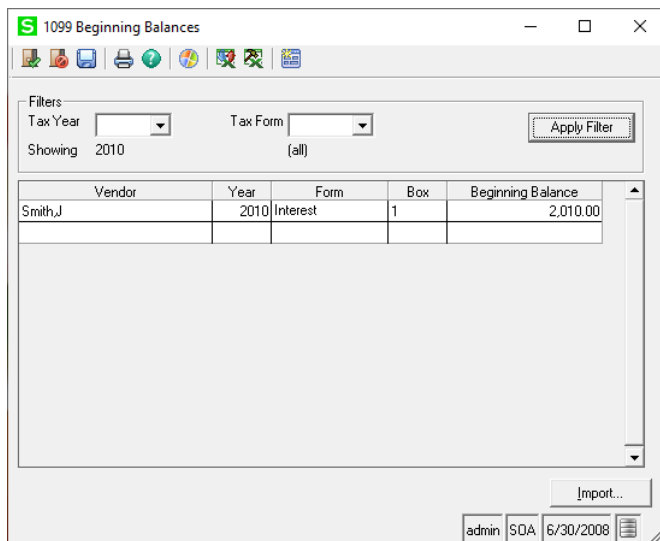
* Product Update 5

| Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50791	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
50814	AP	Update 1099 application to handle new Aatrix AESCrypto.dll	ap1099FormsSvcLnch.bas, ap1099SvcAtx.frm, ap1099FormsSvcLnch.dll, ap1099FormsSvc.bas, ap1099FormsSvc.frm, ap1099FormsSvc.exe	
50797	SM	CDO reference still in EMail and DocDist Projects	EmailUtils.vbp, EmailUtils.dll DocDistributionUtils.vbp, CDocDist.cls DocDistributionUtils.dll	
50809	SO	Sales Order Entry Screen closes after clicking Close (door) icon to close Inventory Status screen	imzqk001.frm, imzqk001.exe	
50822	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.

Apps & features

S	Sage 500 ERP 20xx Server Update	1.91 MB
S	Sage 500 ERP Tax Forms Service	201 MB 12/9/2024
	24.3.10	Modify Uninstall
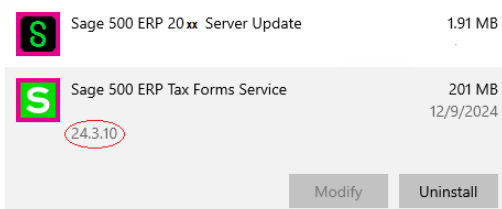
Please do not assume the auto-update functionality of the Sage 500 ERP Tax Forms Service that was used in the past will continue to work. Aatrix Software has updated their software to require a new version of the Sage 500 ERP Tax Forms Service to be installed and the previous version used since Tax Year 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 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.		spsoCreateASalesOrder.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		spsoCreateASalesOrder.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 **2023PU5S.exe** and click **Next** to proceed.
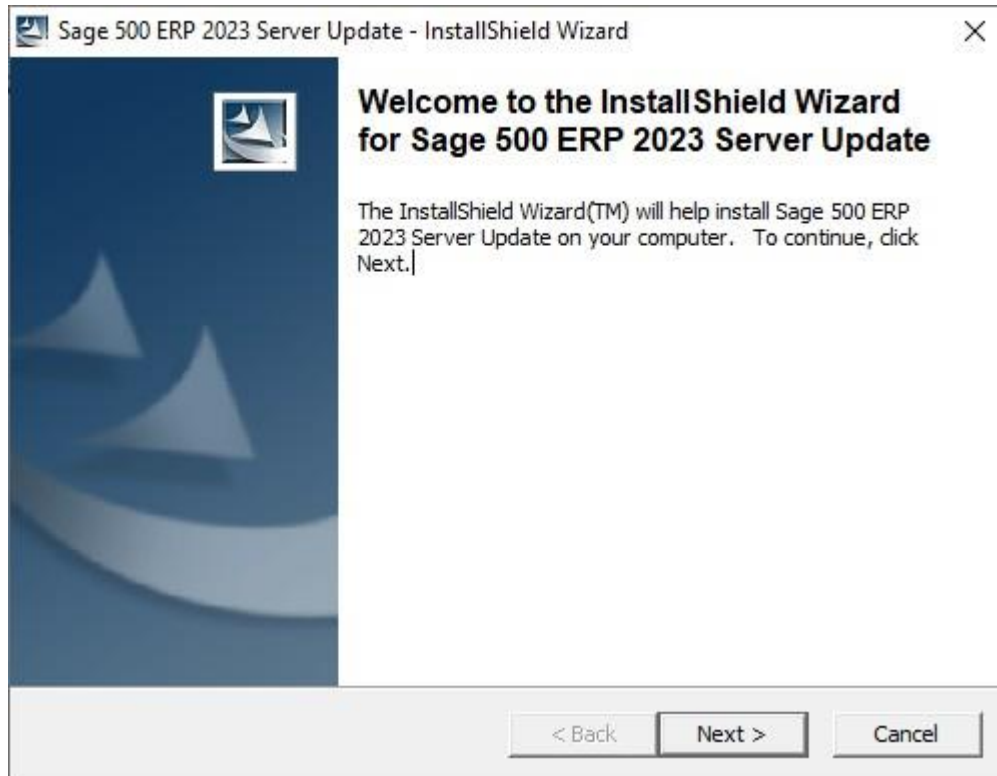
2. Indicate the location to which the installation files should be saved. Select the default location, or select **Change** to browse to a different location.
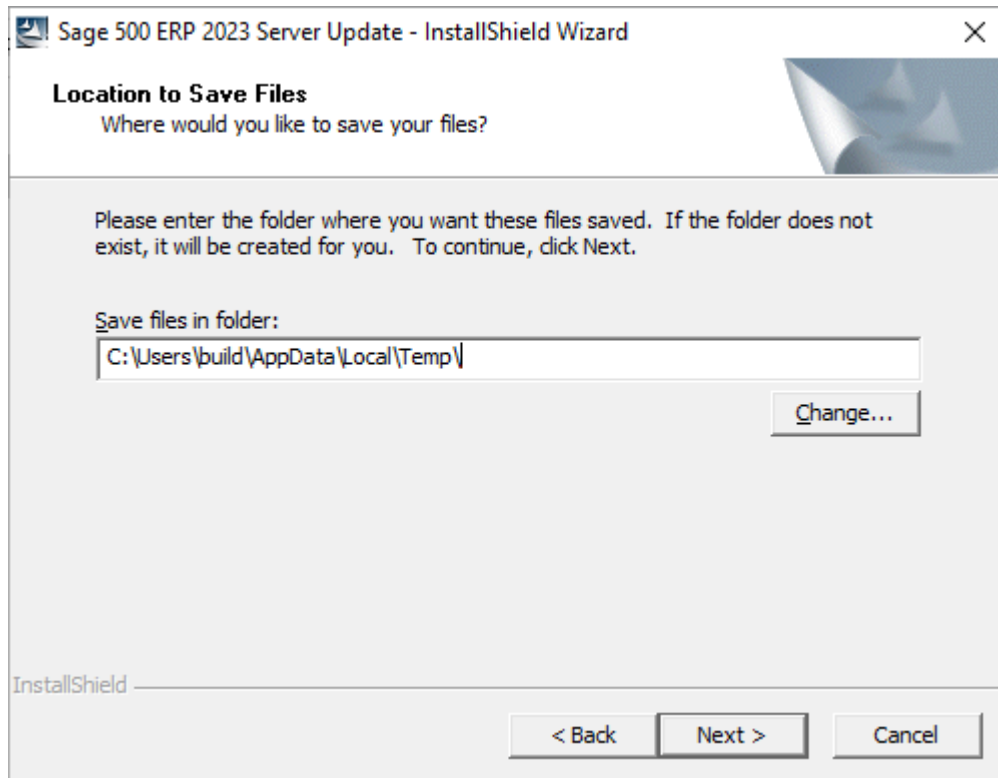
3. At the welcome screen, select **Next** to continue, or **Cancel** to exit setup.
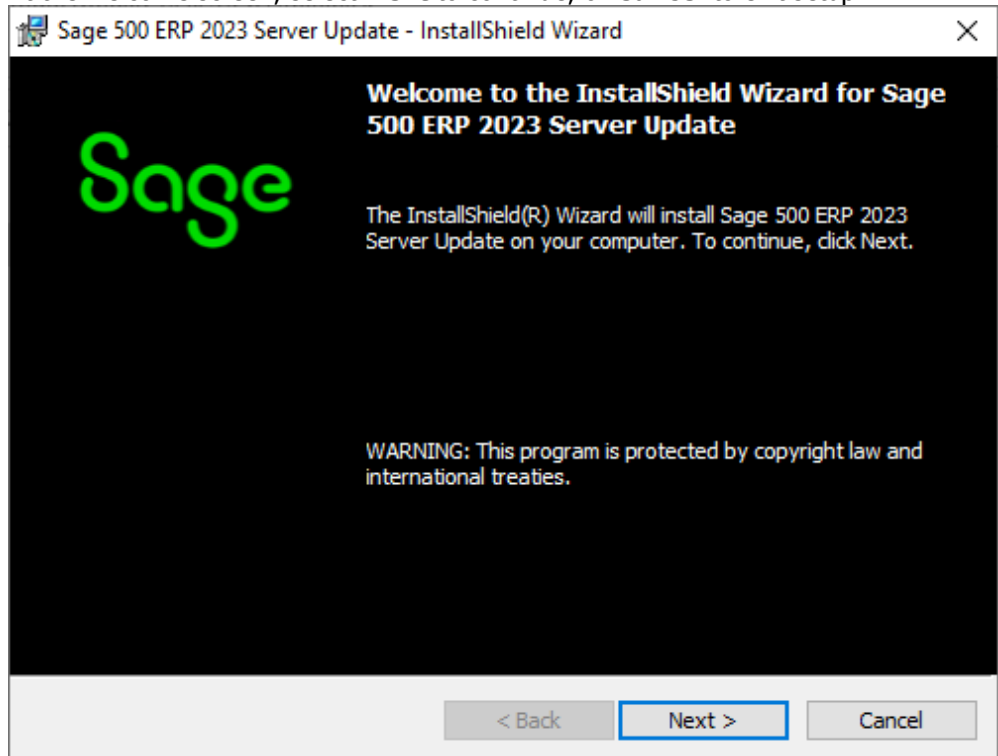
4. Read the License Agreement, select the Accept option and click **Next** to continue.

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

6. Select **Complete** and click **Next** to continue.
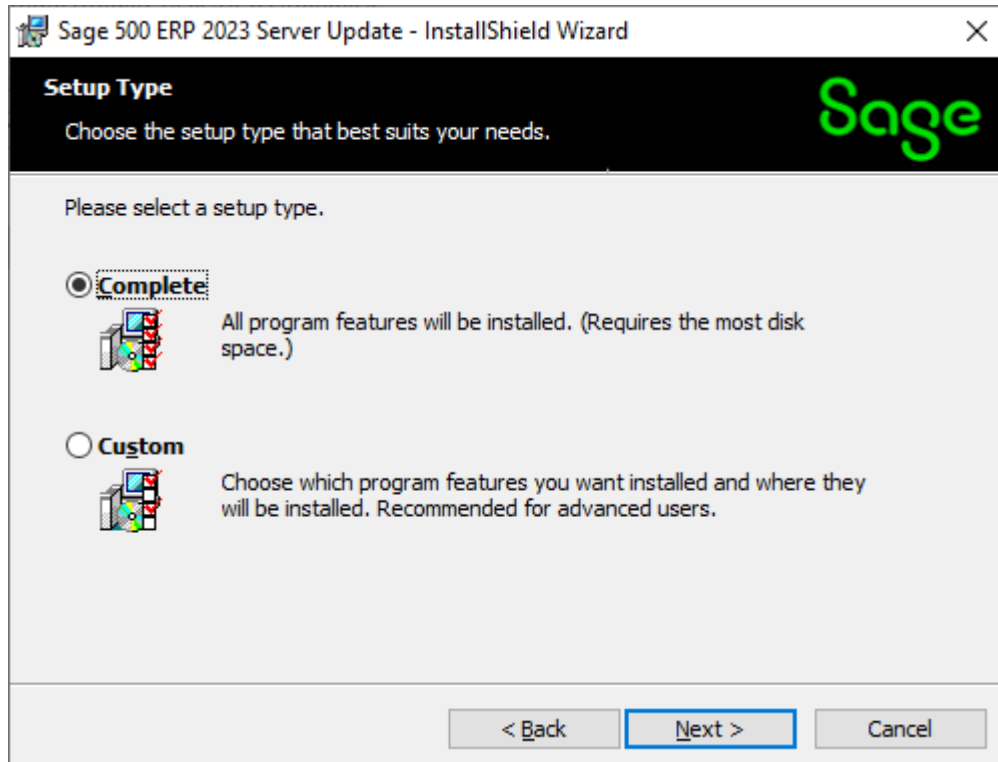
7. Click **Install** to continue.
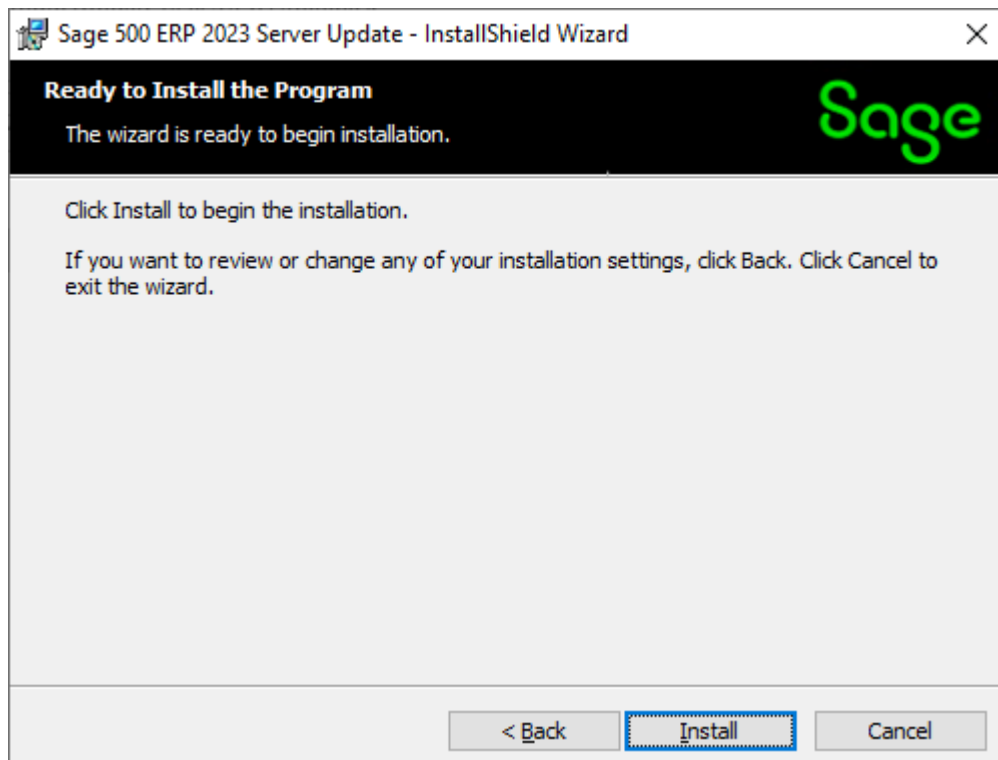
8. At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.
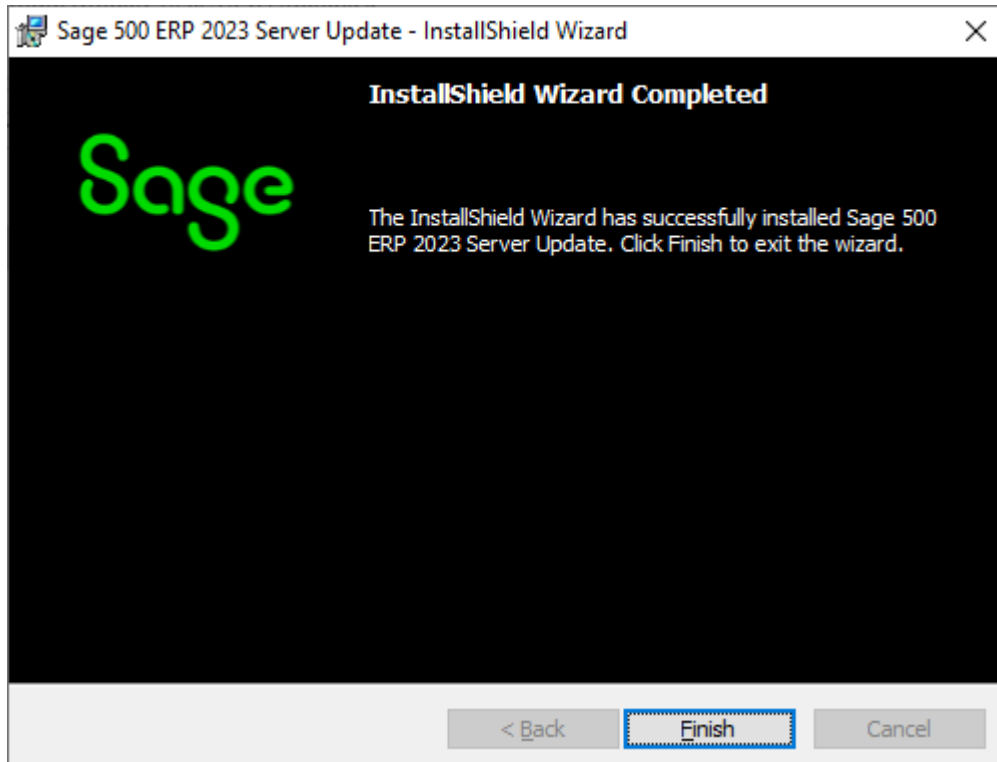
9. If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2023 Product Update 5** from the Sage 500 ERP 2023 program group.
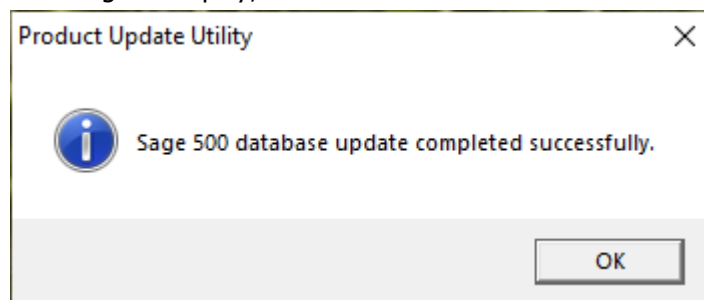
10. Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.
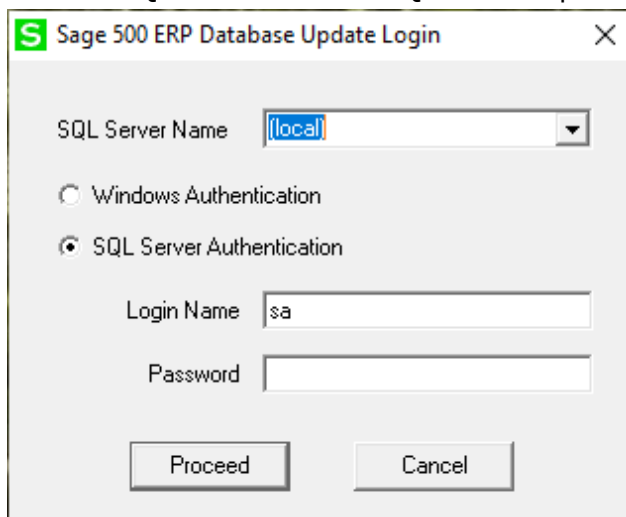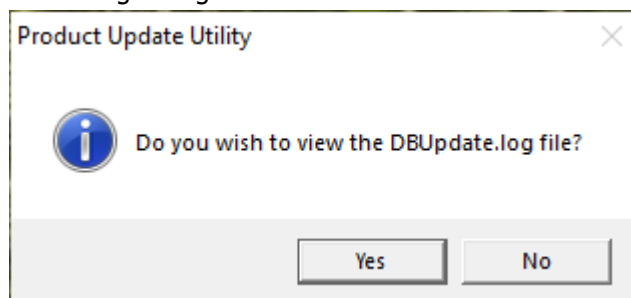
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.
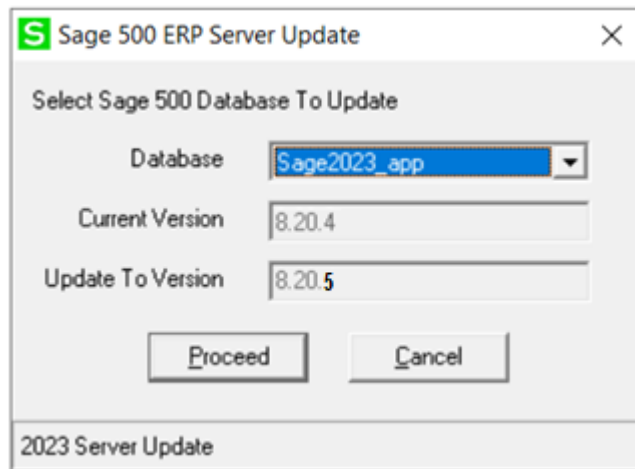
12. This confirmation dialog will display; select **OK** to continue.

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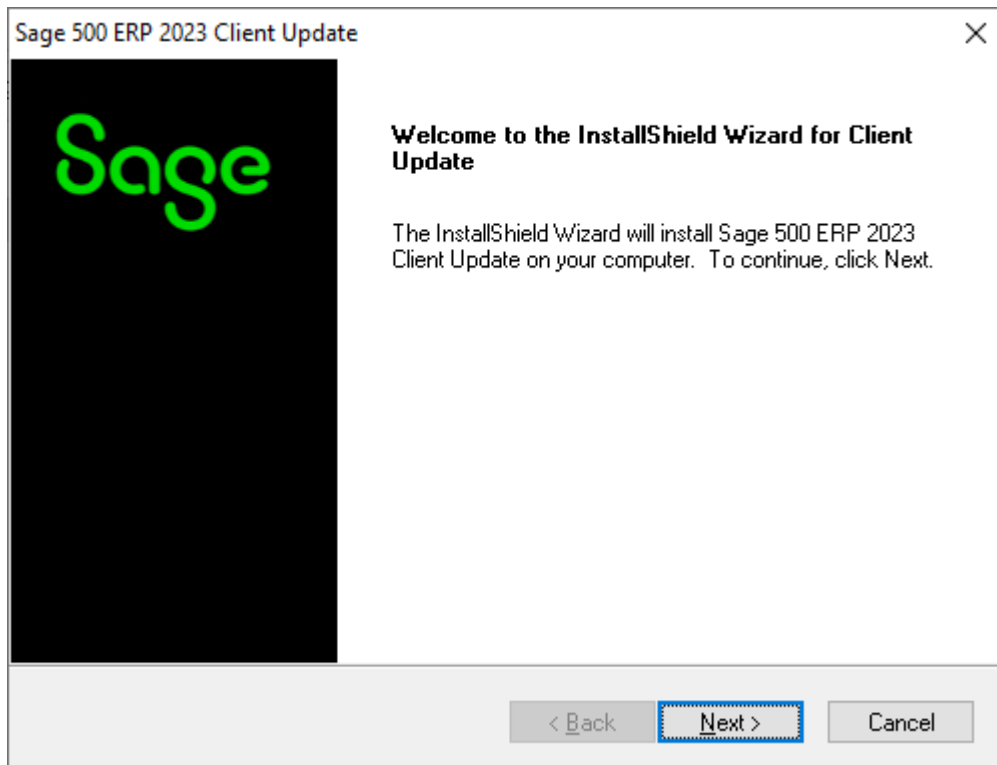
Installing the Client

1. To begin the Sage 500 ERP 2023 Client installation, double-click the **2023PU5C.exe**. A screen similar to the one below will display, click **Continue** to proceed.
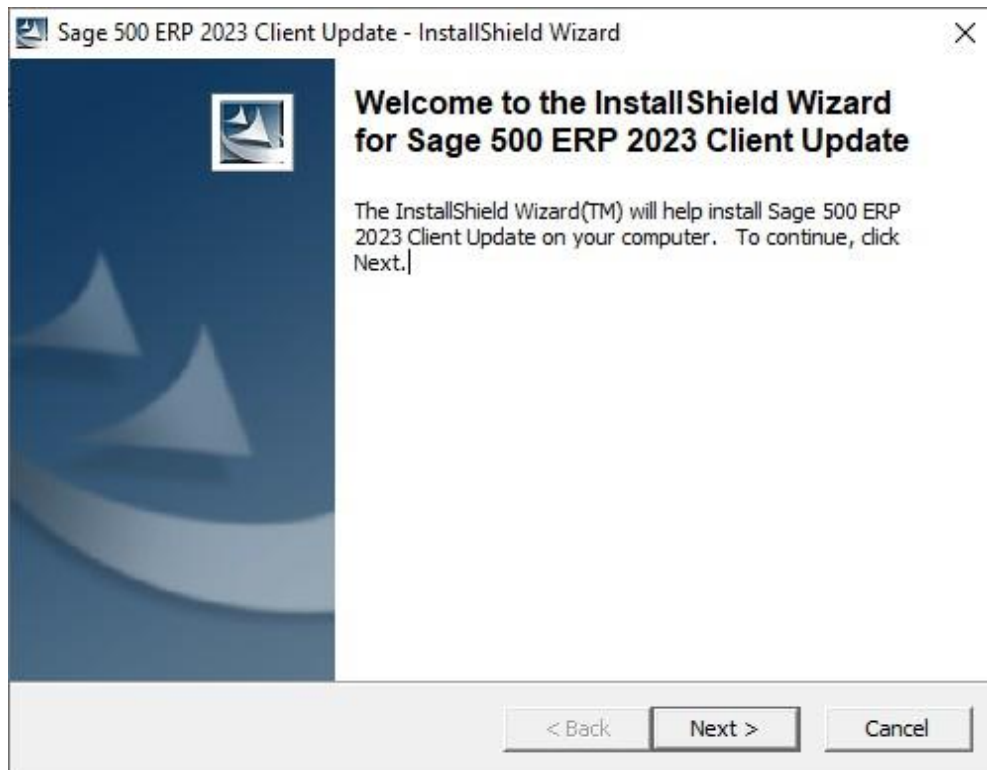
2. At the Welcome screen, click **Next** to continue.

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