

S A G E 5 0 0 E R P 2 0 2 4

Release Notes

Version 8.30.2

Product Update 2

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 2025 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
Enhancements.....	4
* Product Update 2	6
Product Update 1.....	8
Installation Instructions	9
Installing the Server.....	9
Installing the Client.....	15

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

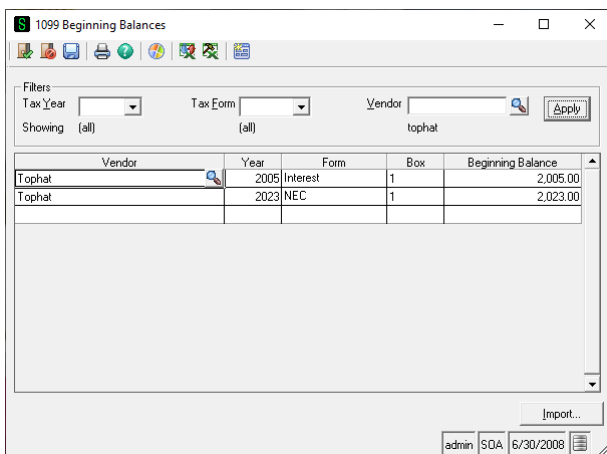
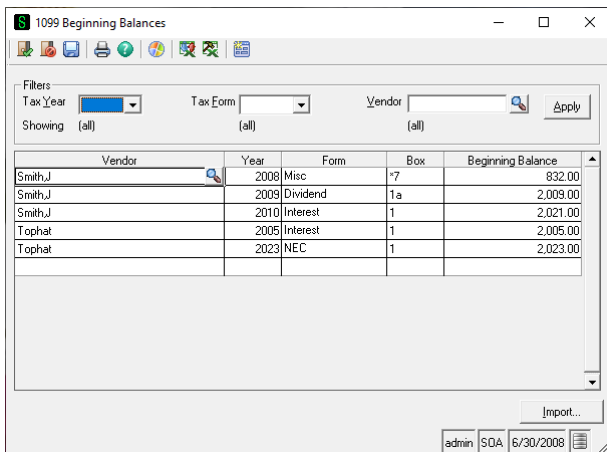
The following is a list of enhancements and corrections that have been incorporated into this Sage 500 ERP 2024 Product Update.

***Indicates a new enhancement or program fix in this Update. All new to Product Update 2 have been consolidated under one section "Product Update 2".**

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.

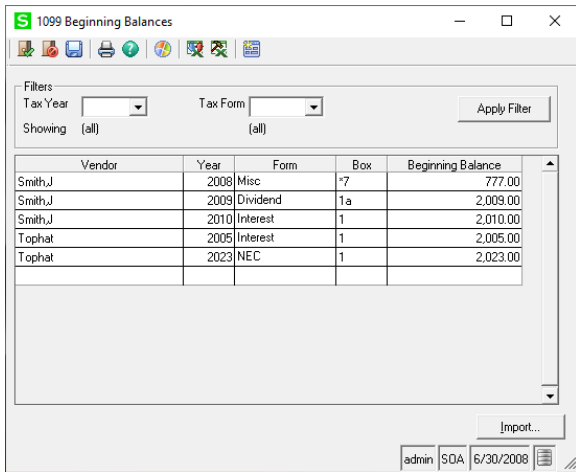
Available: Product Update 2.



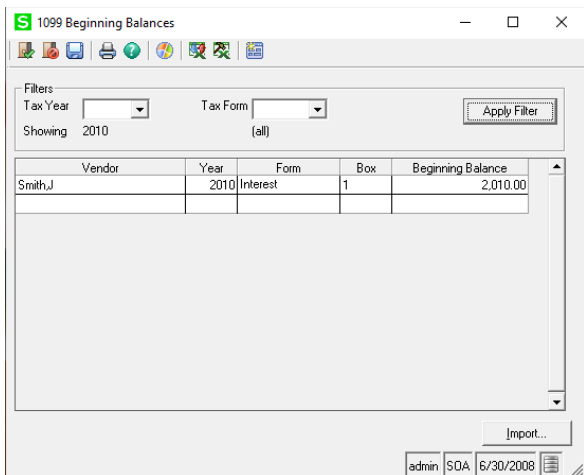
Enhancement: This July 2024 PU enhancement allows a user to restrict the entries that appear in the grid for the 1099 Beginning Balances application. By default, all tax years and forms were appearing. Filters were added to allow the grid to be pared down for editing should the need arise.

This is expected to help out users who make a lot of beginning balance entries as part of their 1099 processing.

Available: Product Update 1



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



* Product Update 2

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50792	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
50813	AP	Update 1099 application to handle new Aatrix AESCrypto.dll	ap1099FormsSvcLnch.bas, ap1099SvcAtx.frm, ap1099FormsSvcLnch.dll, ap1099FormsSvc.bas, ap1099FormsSvc.frm, ap1099FormsSvc.exe	
50796	SM	CDO reference still in EMail and DocDist Projects	EmailUtils.vbp, EmailUtils.dll DocDistributionUtils.vbp, CDocDist.cls DocDistributionUtils.dll	
50803	SO	Sales Order Entry Screen closes after clicking Close (door) icon to close Inventory Status screen	imzqk001.frm, imzqk001.exe	
50823	IM	IM Global Price Group Change Export to Excel is not working on Office 365	ExcelServices.cls ExportUtil.dll	

SPECIAL NOTE:

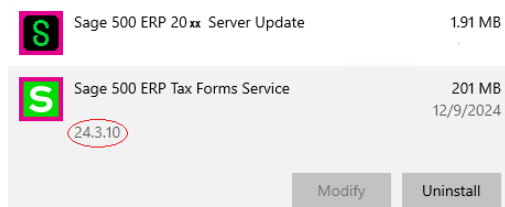
If you do not utilize 1099 functionality within Sage 500 ERP then you can ignore this special note.

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



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 1

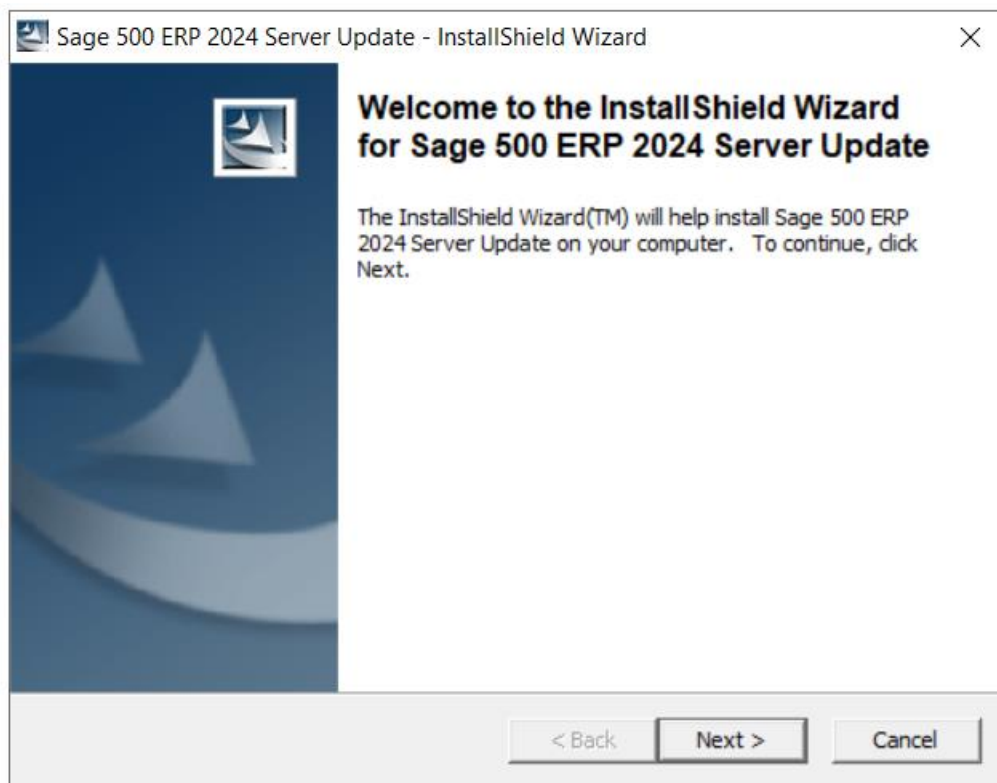
Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50777	AP	1099 Beginning Balances - Enhance to include filtering capabilities	apzdn001.frm, apzdn002.frm, LocalizationConst.bas, APZDN001.exe	spAPTempVend1099Bal.sql, CreateLocalMsg_100445.sql, CreateLocalMsg_100446.sql
50767	AP	Process Credit Card Transfer uses the full voucher amount instead of the remaining balance of the Voucher already partially paid		spAPSelectVouchForCCPayment.sql
50762	AP	Printing Checks on RDP Session not using Session Default printer as selection	apzra001.bas, apzra001.exe, apzradl1.dll	
50675	SO	Limit Number of Orders to Pick does not retain when saving a setting in Create Picklist	selectpickline.frm, SOSelectPickLine.dll	

Installation Instructions

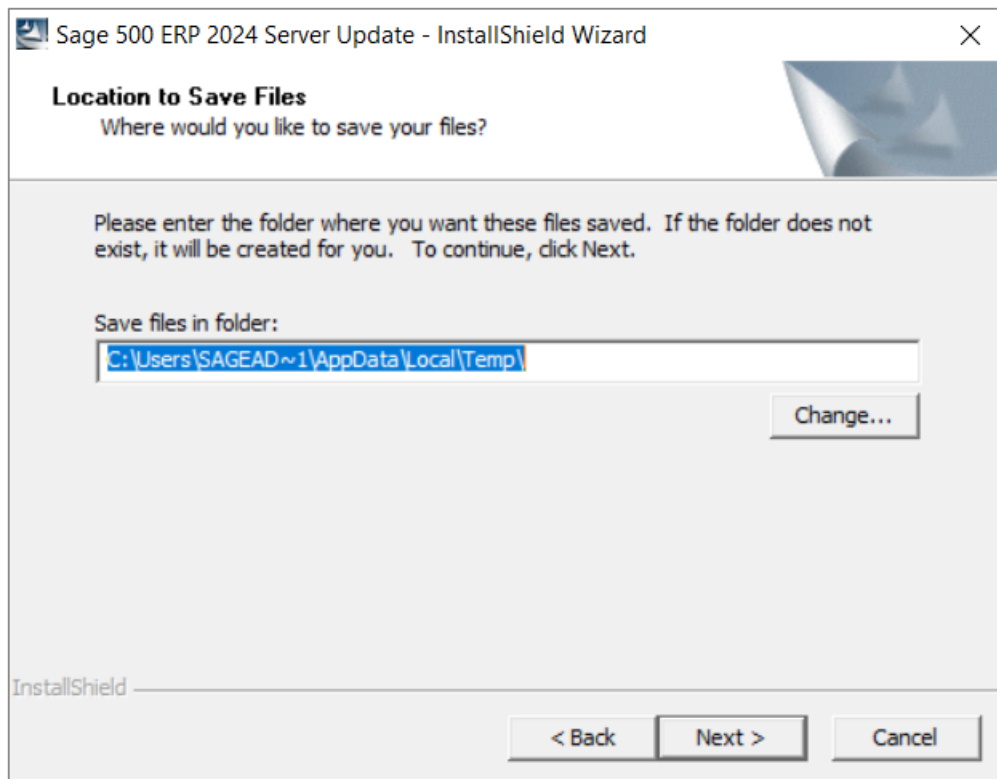
Installing the Server

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

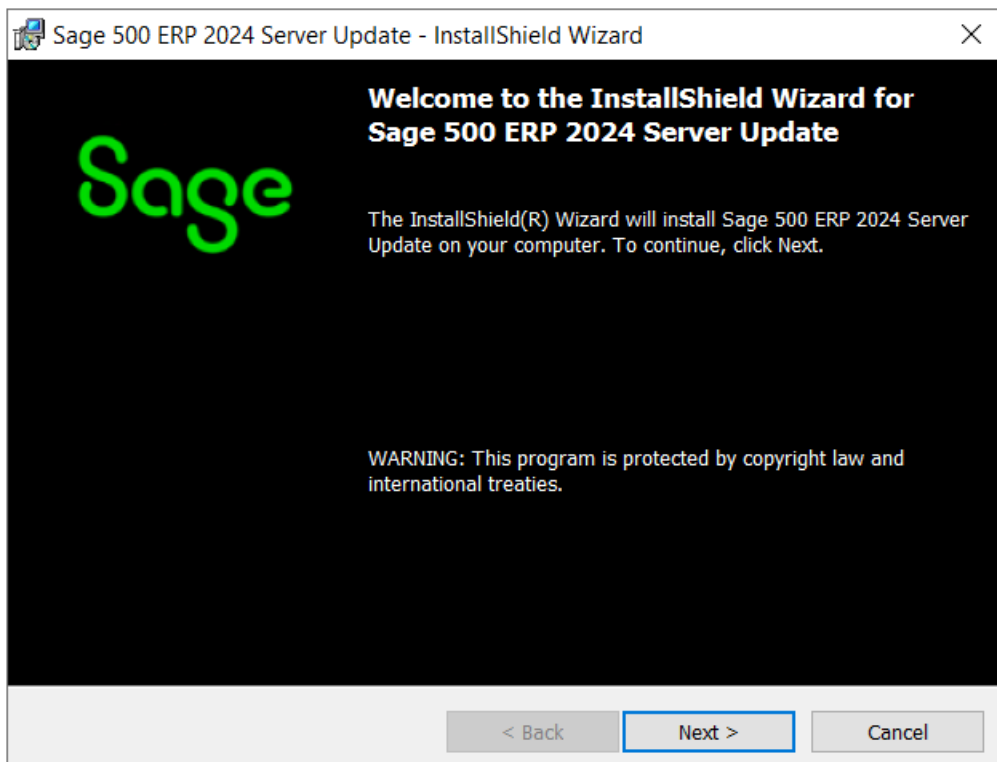
1. To begin the Sage 500 ERP 2024 Server installation, double-click **2024PU2S.exe** and click **Next** to proceed.



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.



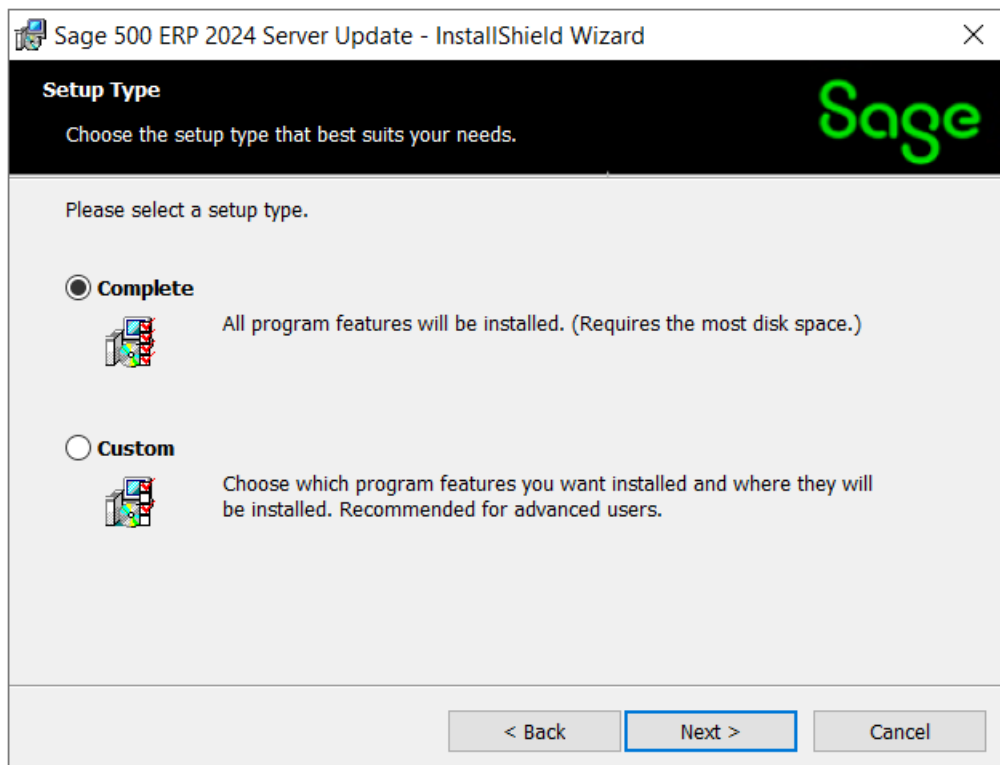
4. Read the License Agreement, select the Accept option and click **Next** to continue.

The screenshot shows a window titled "Sage 500 ERP 2024 Server Update - InstallShield Wizard". The window has a black header bar with the Sage logo in green on the right. Below the header, the text "License Agreement" is displayed in white, followed by "Please read the following license agreement carefully." in white. The main content area has a white background and is titled "Sage End User License Agreement". It 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 bolded paragraph: "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) SIGNING THIS AGREEMENT OR (3) USING THE SOFTWARE IF". Below the text are two radio button options: "I accept the terms in the license agreement" (which is selected) and "I do not accept the terms in the license agreement". To the right of the first option is a "Print" button. At the bottom of the window are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

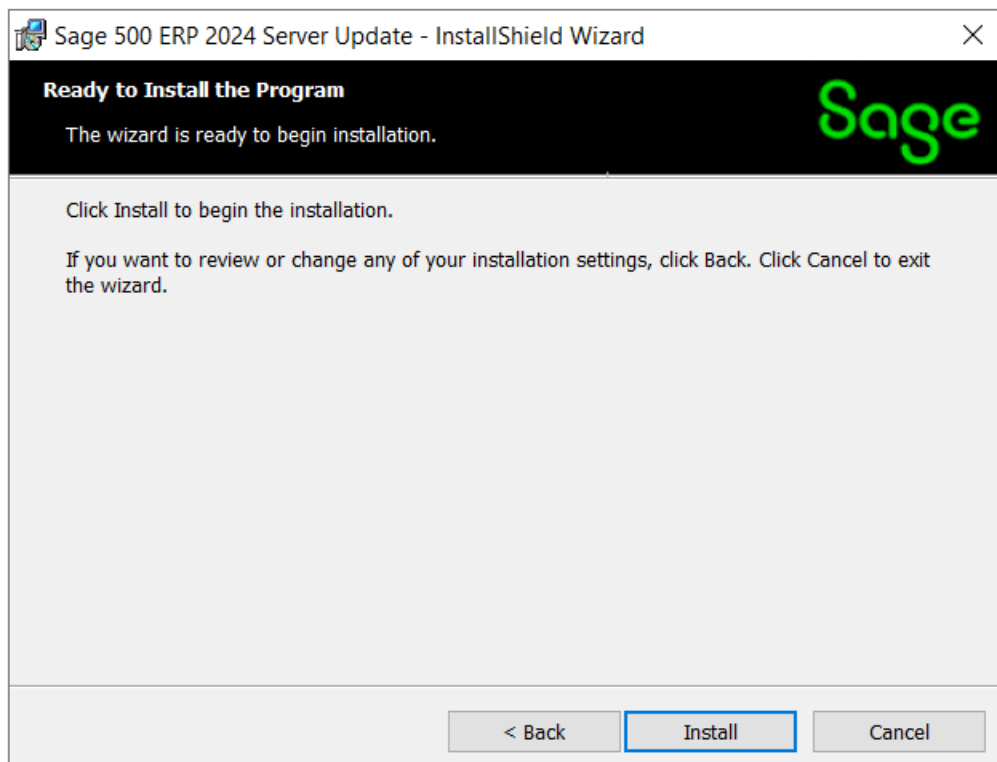
5. Enter the User Name, Organization, and click **Next** to continue.

The screenshot shows a window titled "Sage 500 ERP 2024 Server Update - InstallShield Wizard". The window has a black header bar with the Sage logo in green on the right. Below the header, the text "Customer Information" is displayed in white, followed by "Please enter your information." in white. The main content area has a white background and contains two text input fields. The first field is labeled "User Name:" and contains the text "Sage". The second field is labeled "Organization:" and contains the text "Sage Software". At the bottom of the window are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

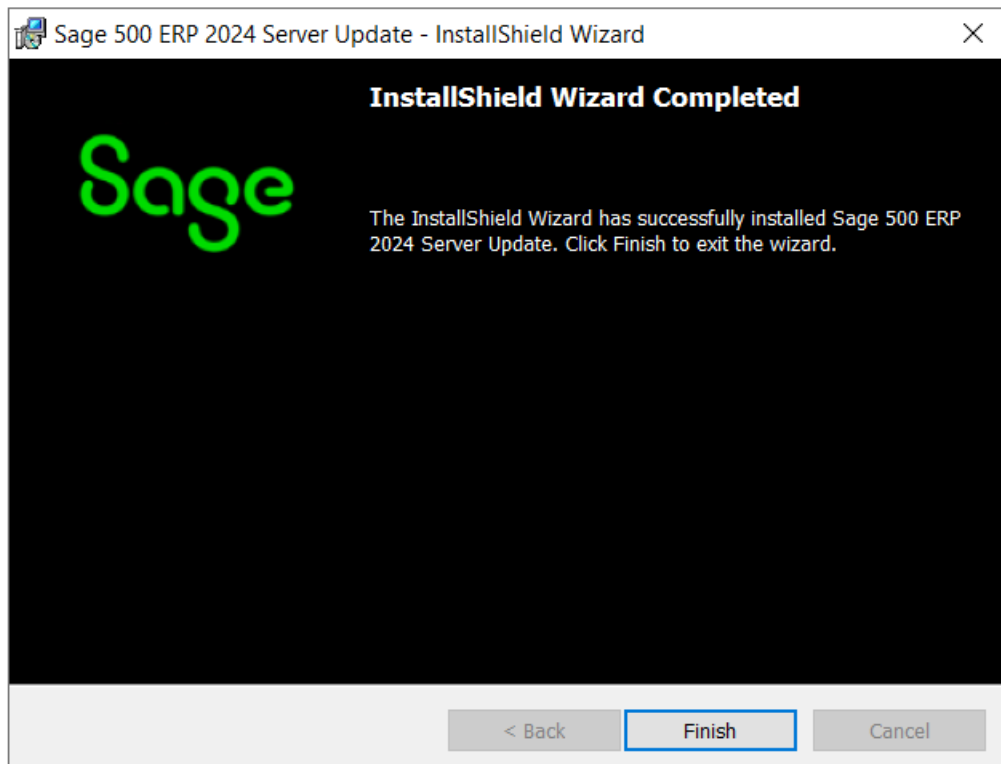
6. Select **Complete** and click **Next** to continue.



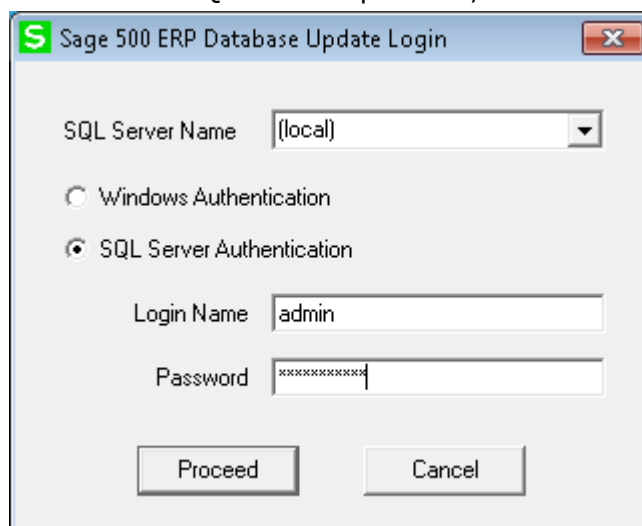
7. Click **Install** to continue.



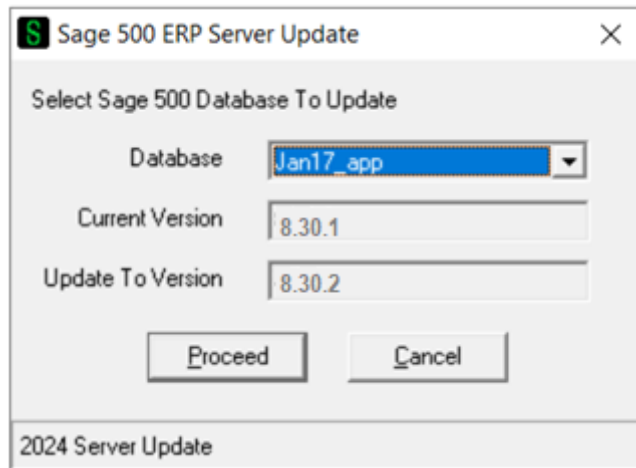
- At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.



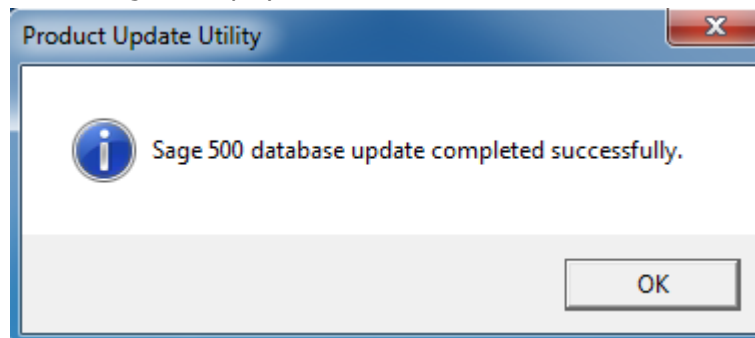
- If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2024 Product Update 2** from the Sage 500 ERP 2024 program group.
- Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.



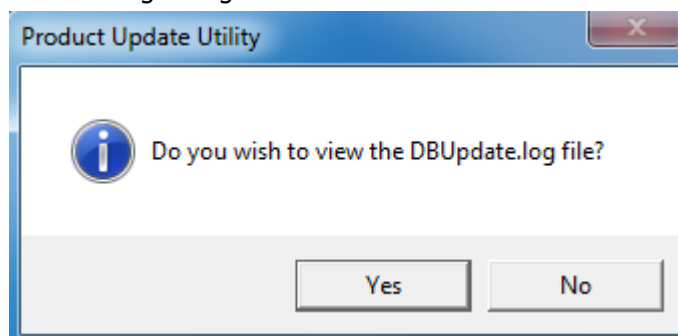
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.



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

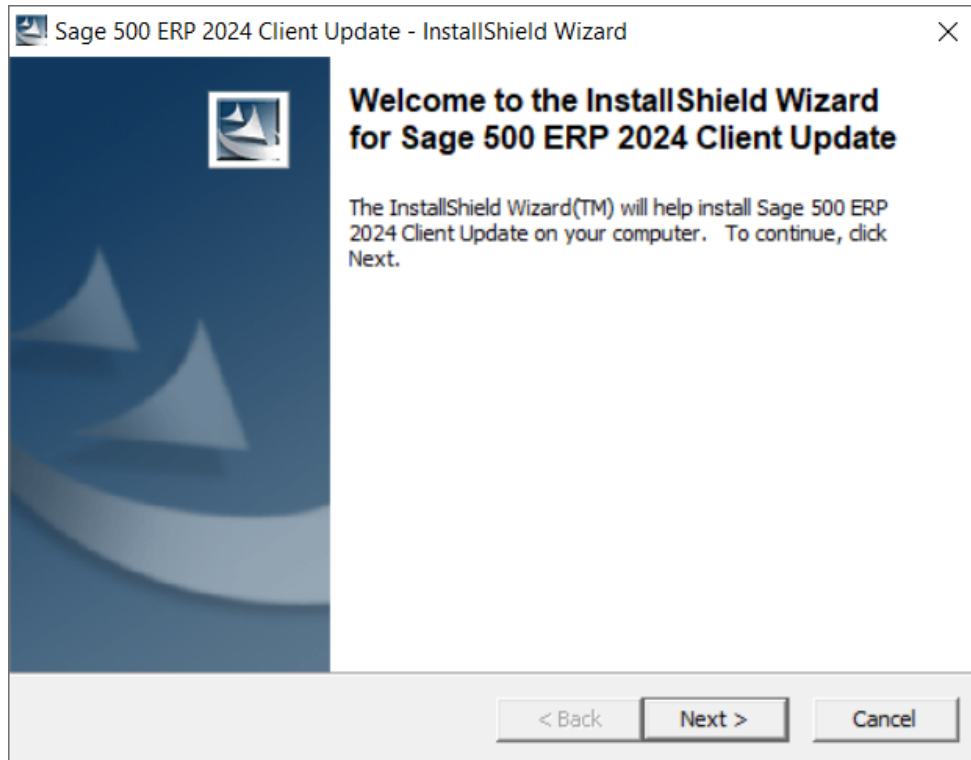


13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:

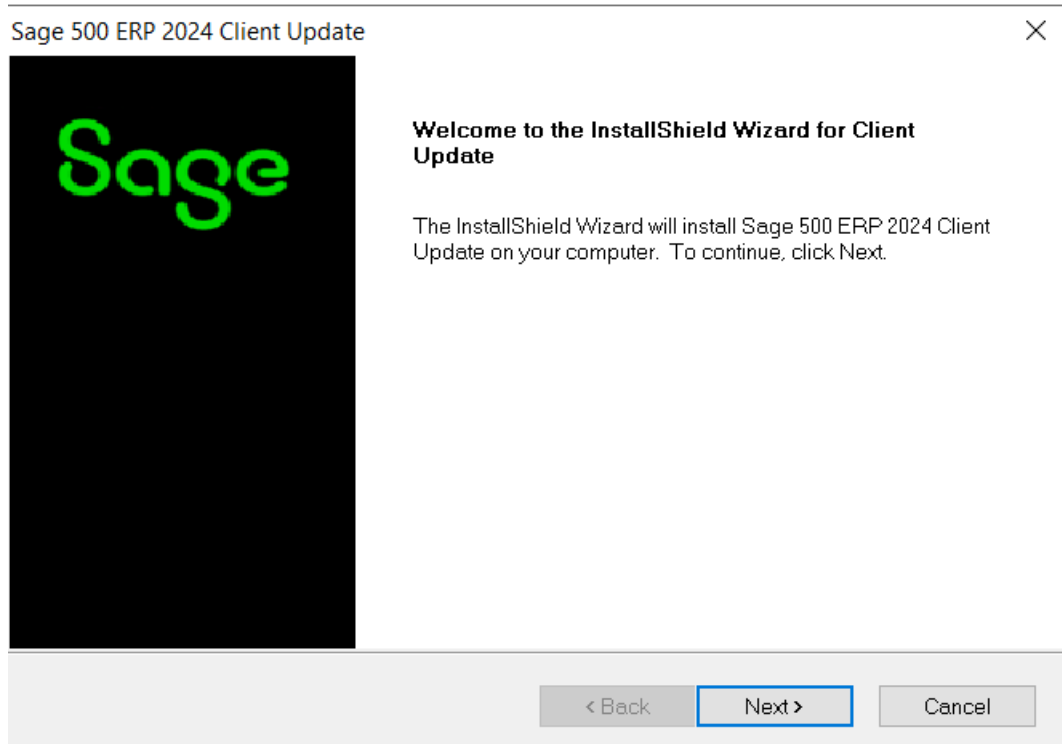


Installing the Client

1. To begin the Sage 500 ERP 2024 Client installation, double-click the **2024PU2C.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.

