

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

Release Notes

Version 8.20.8

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.

Copyright 2026 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 8	6
Product Update 7	6
Product Update 6	7
Product Update 5	8
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 2023 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 5.

The screenshot shows the '1099 Beginning Balances' application window. The 'Filters' section at the top includes 'Tax Year' (set to 2008), 'Tax Form' (set to Misc), and 'Vendor' (set to Smith,J). The 'Showing' dropdown is set to '(all)'. Below the filters is a table with the following data:

Vendor	Year	Form	Box	Beginning Balance
Smith,J	2008	Misc	*7	832.00
Smith,J	2009	Dividend	1a	2,009.00
Smith,J	2010	Interest	1	2,021.00
Tophat	2005	Interest	1	2,005.00
Tophat	2023	NEC	1	2,023.00

At the bottom right of the window, there is an 'Import...' button and a status bar showing 'admin SDA 6/30/2008'.

The screenshot shows the '1099 Beginning Balances' application window with the 'Vendor' filter set to 'tophat'. The table now displays only the records for 'tophat':

Vendor	Year	Form	Box	Beginning Balance
Tophat	2005	Interest	1	2,005.00
Tophat	2023	NEC	1	2,023.00

The status bar at the bottom right still shows 'admin SDA 6/30/2008'.

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

The screenshot shows the '1099 Beginning Balances' application window. It features a 'Filters' section with 'Tax Year' and 'Tax Form' dropdown menus, and an 'Apply Filter' button. Below the filters, a table displays the following data:

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

At the bottom right, there is an 'Import...' button and a status bar showing '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.

The screenshot shows the '1099 Beginning Balances' application window after applying a filter for Tax Year 2010. The 'Showing' dropdown now displays '2010'. The table below shows only the entry for the year 2010:

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

The status bar at the bottom right still shows 'admin SOA 6/30/2008'.

* Product Update 8

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50927	MultiModule	2023-Office Integration Word Closes prematurely	MailServices.cls, WordServices.cls, Office.vbp, office.dll	

Product Update 7

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50887	AP	Inform 1099 user when a previous submission batch removal is complete	ap1099FormsSvc.frm, ap1099FormsSvc.exe	
50892	AP	1099 Pre-Saved Settings does not work properly	ap1099FormsSvc.frm, ap1099FormsSvc.exe	
50906	AP	1099 TY 2025 Compliance Release	ap1099FormsSvc.frm, ap1099FormsSvc.bas, ap1099FormsSvc.exe, ap1099SvcAtx.frm, ap1099FormsSvcLnch.dll	spapProcess1099_TaxSvc.sql, ap1099Update2025.sql
50910	AR	Error in Validating Address of Sage 500 customer	HTTPUtils.cs, HTTPUtilFx.csproj, encHelper.cs, HTTPUtilFx.dll, HTTPUtilFx.tlb, Newtonsoft.Json.dll, Newtonsoft.Json.xml	

Product Update 6

Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50847	PA	PA does not report posting to closed fiscal period error	LocalizationConst.BAS, PAZGF001.frm, pazgf001.dll	spimlsValidFiscPer.sql
50851	IM	Closed or Completed Work Orders are shown in Open Work Order Preview in the Maintain Items task	Preview.frm, DataViewUtils.dll	
50856	SM	Getting Unhandled Exception errors when clicking refresh using the Client Configuration utility	ClientConfig.vb, ClientConfig.exe	
50860	AP	Conversion error on EFT – Register/Post process		spapGetNextTranNoForPmt.sql
50862	SM	Grid Manager fails to allow all surrogate key values in a Farpoint grid defined as integer	FPGrid.cls, GridUtils.dll	
50870	GL	GL Set Up Account Structure fails when shortening a segment for a new company	Glzmi001.frm, Glzmi001.exe, GLZMIDL1.dll	

Special Note Regarding 50862:

This change only reflects the common DLL. The change added a method that Sage 500 ERP will use in the future with applications. As an application change would be needed to complete the process and that there are potentially many applications affected, we are only supplying the common method change and not the actual application changes. Sage 500 ERP 2026 will include the application changes also. Should you run into this issue, a code change will be needed and we would hope that you will utilize the common method provided.

An example of the code change is shown below:

```
gGridSetColumnType grdInvoices, kColInvKey, SS_CELL_TYPE_INTEGER
```

changes to

```
gGridSetColumnType grdInvoices, kColInvKey, SS_CELL_TYPE_INTEGER, FPSS_GridMinMaxValues.VB_Integer_Max
```

The new optional parameter for gGridSetColumnType allows for the specification of the grid cell size. The default size of an integer in the FarPoint grid is smaller than the possible values of a surrogate key. For systems with very large numbers of surrogate key values for a table this can cause a problem. By setting it to the VB_Integer_Max value, the grid then should support values in the 2 billion range instead of the default 10 million range. By default, the code will maintain the 10 million value range. To implement this new grid manager DLL in this PU, a custom code change would need to be made to the application having an issue. In general, it would need to be applied to those grid cells defined as SS_CELL_TYPE_INTEGER that house surrogate key or similar types of values.

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:

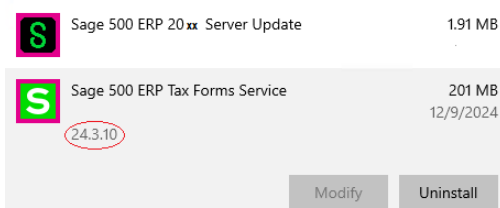
If you do not utilize 1099 functionality within Sage 500 ERP then you can ignore this special note.

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



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		spsoPopPOTagWrk.sql
50712	SO	Dropship SO does not appear in the 'Select Ship Line for Returns Lookup window	SelectLines.frm, SOLineSelectEng.dll	

Product Update 1

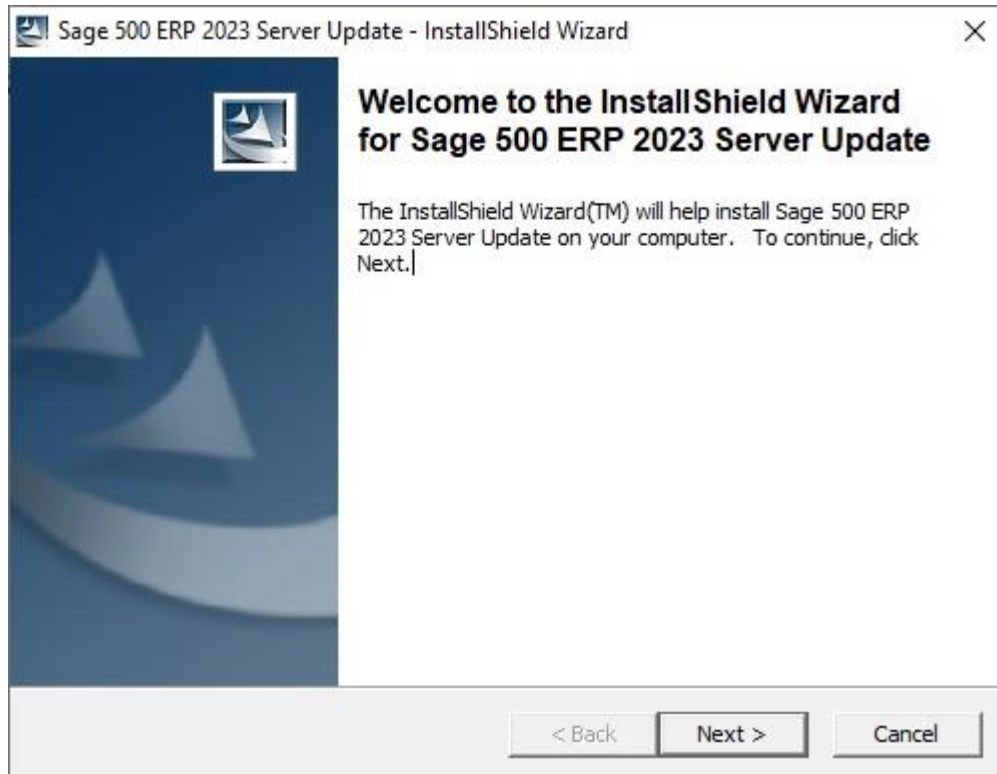
Issue ID	Module	Short Description	Objects Modified - Client	Object Modified - Database
50688	AP	1099 TY 2022 PU Update - v2023	ap1099FormsSvcLnch\ap1099SvcAtx.frm	spapProcess1099_TaxSvc.sql spapSubmit1099_TaxSvc.sql ap1099Update2022.sql

Installation Instructions

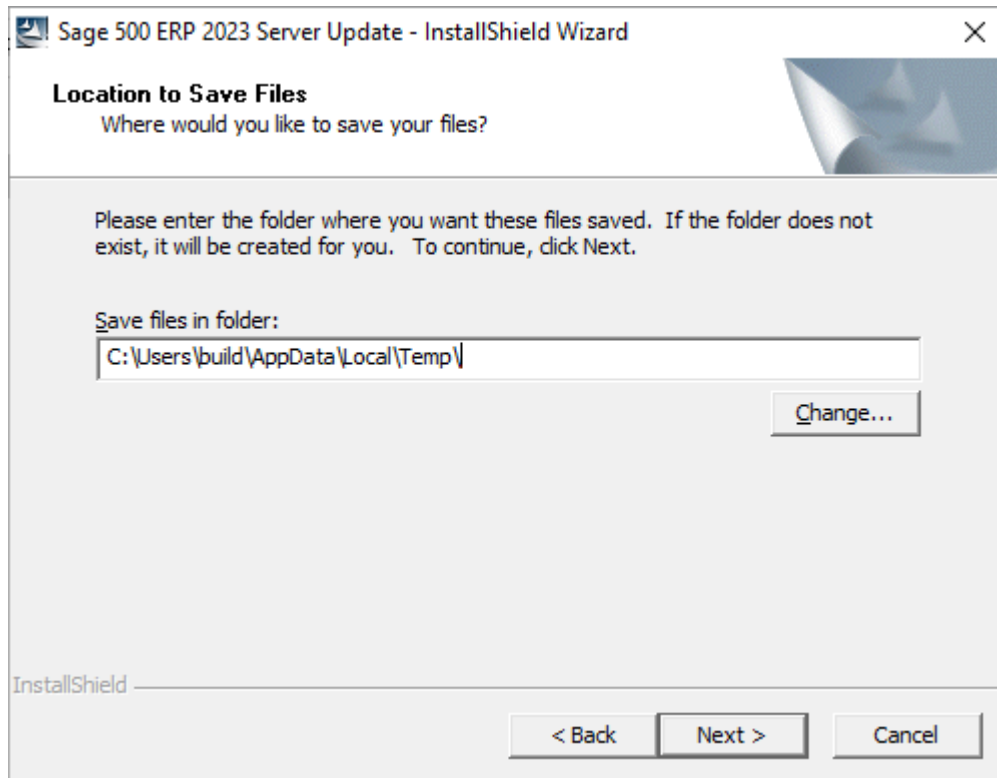
Installing the Server

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

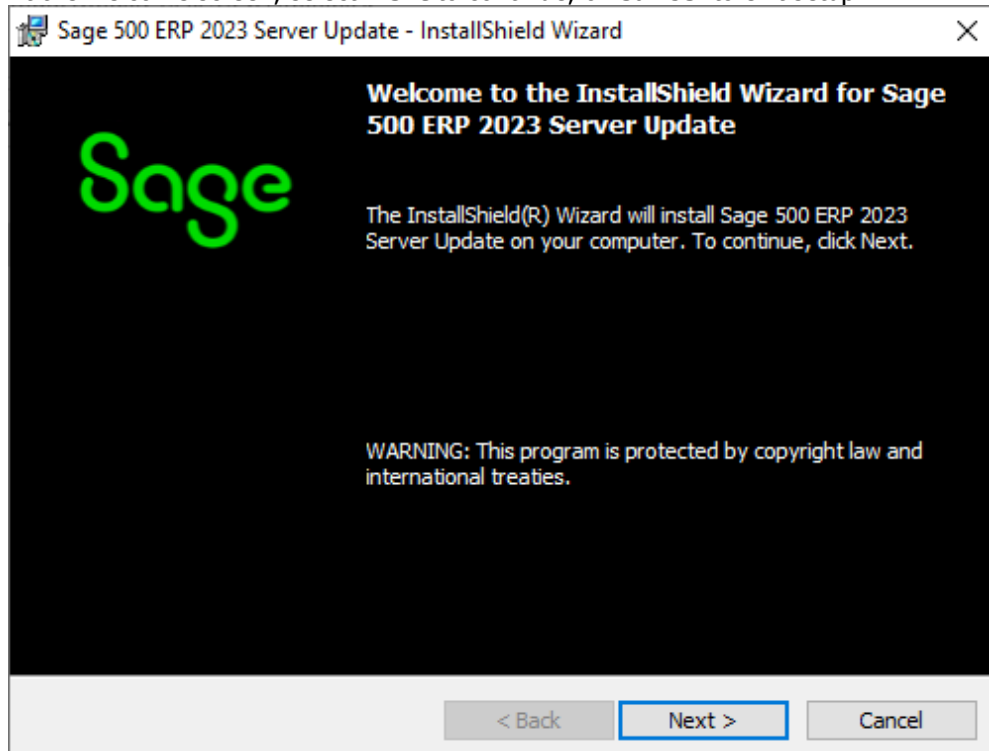
1. To begin the Sage 500 ERP 2023 Server installation, double-click **2023PU8S.exe** and click **Next** to proceed.



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.

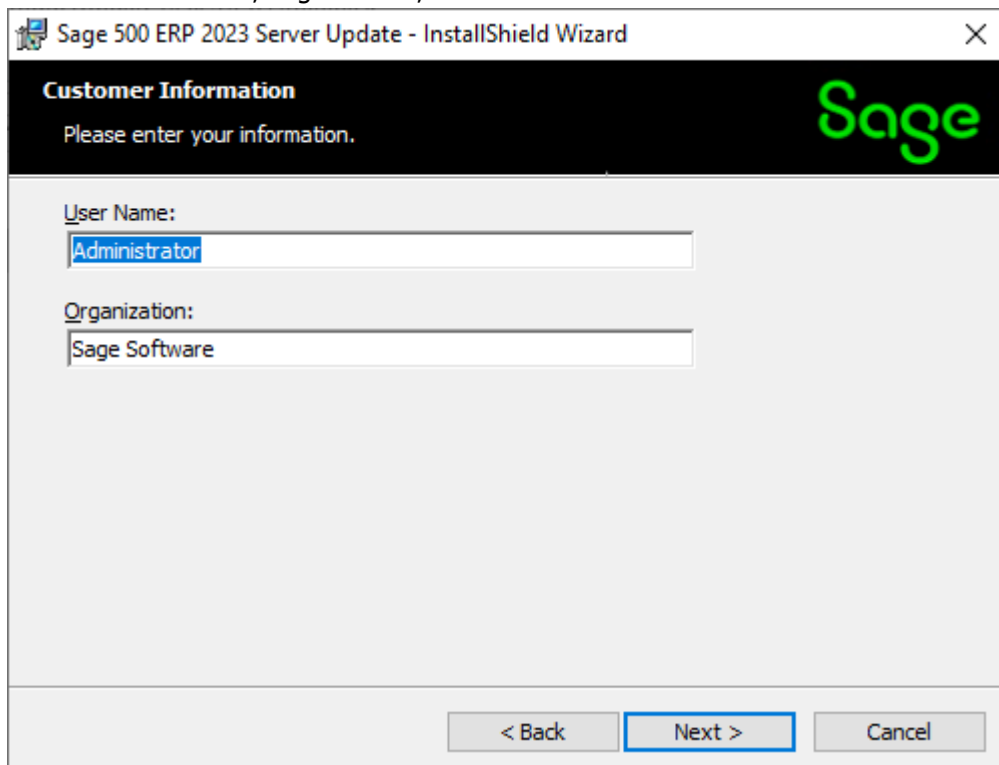


4. Read the License Agreement, select the Accept option and click **Next** to continue.



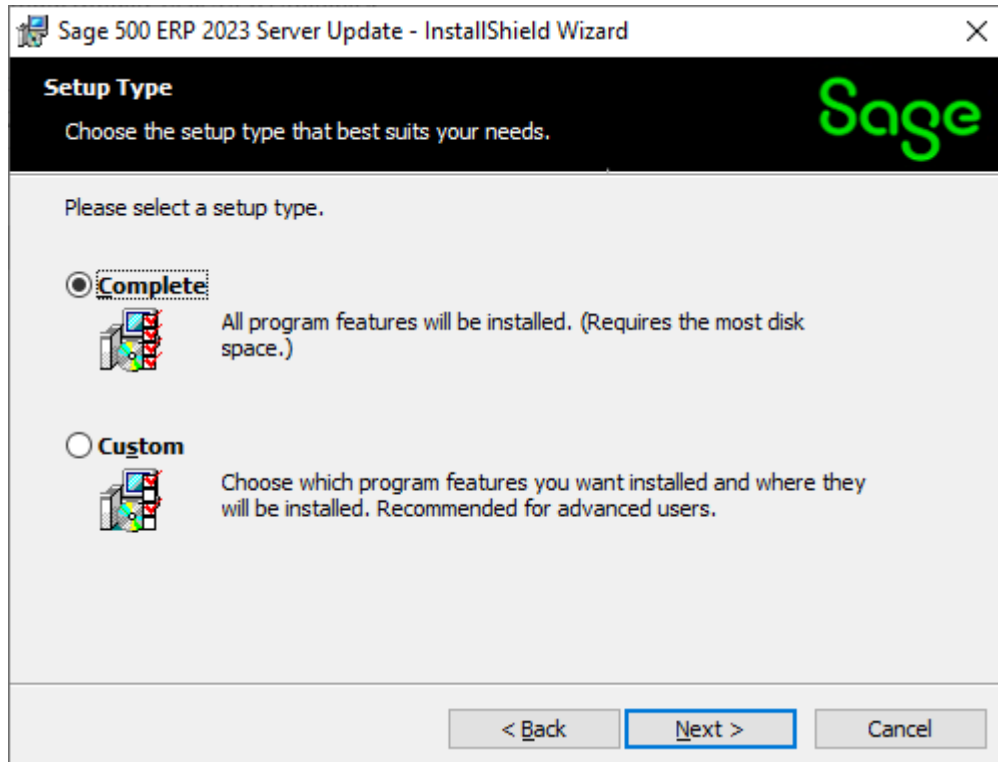
The screenshot shows the 'License Agreement' window of the Sage 500 ERP 2023 Server Update - InstallShield Wizard. The window has a black header bar with the Sage logo on the right. Below the header, the text 'Please read the following license agreement carefully.' is displayed. The main content area 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, a paragraph states: '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, there are two radio buttons: '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 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.

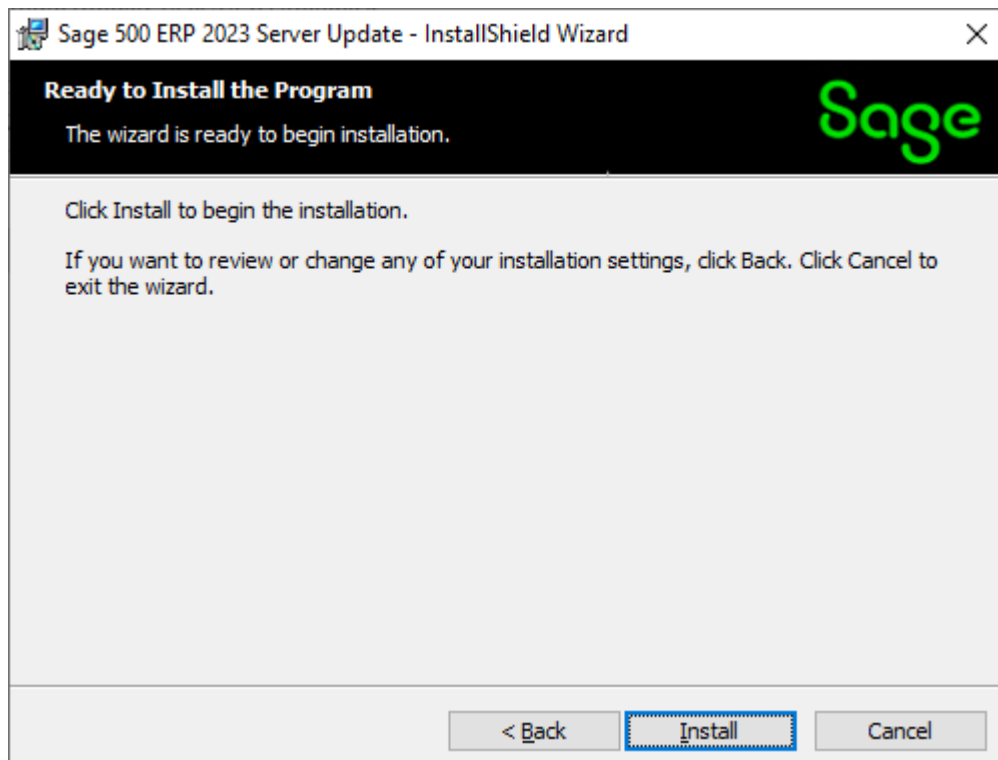


The screenshot shows the 'Customer Information' window of the Sage 500 ERP 2023 Server Update - InstallShield Wizard. The window has a black header bar with the Sage logo on the right. Below the header, the text 'Please enter your information.' is displayed. The main content area contains two text input fields: 'User Name:' with the value 'Administrator' and 'Organization:' with the value 'Sage Software'. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

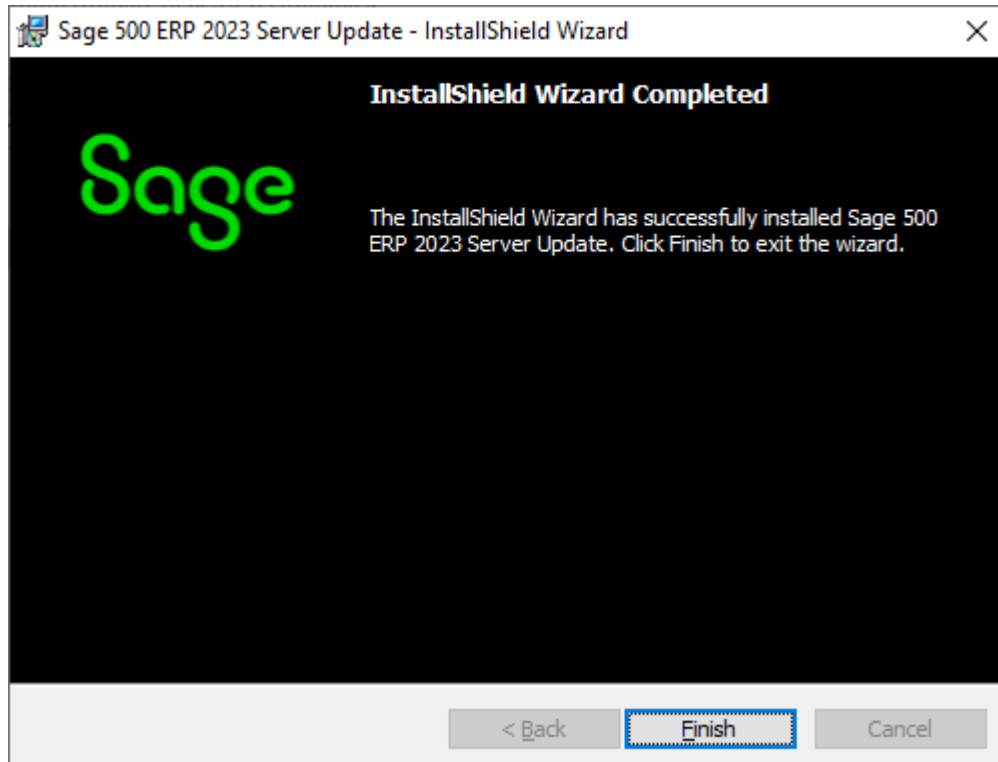
6. Select **Complete** and click **Next** to continue.



7. Click **Install** to continue.



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

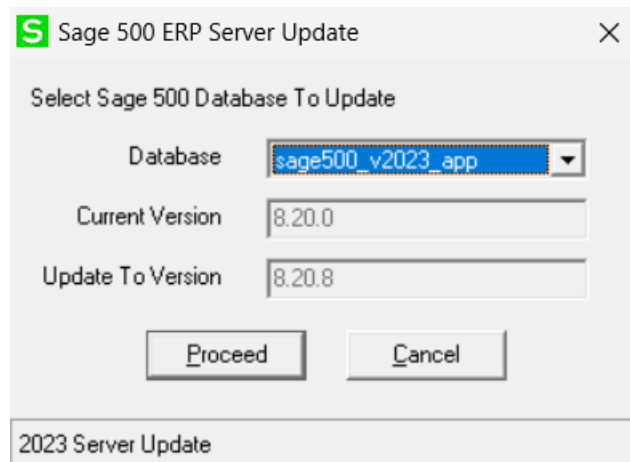


9. If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2023 Product Update 8** from the Sage 500 ERP 2023 program group.

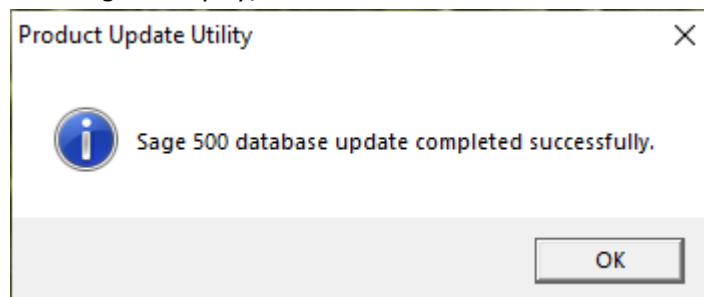
10. Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.

The screenshot shows a dialog box titled "Sage 500 ERP Database Update Login". It contains a dropdown menu for "SQL Server Name" with "(local)" selected. Below this are two radio buttons: "Windows Authentication" (unselected) and "SQL Server Authentication" (selected). Under "SQL Server Authentication", there are text boxes for "Login Name" containing "sa" and an empty "Password" box. At the bottom are "Proceed" and "Cancel" buttons.

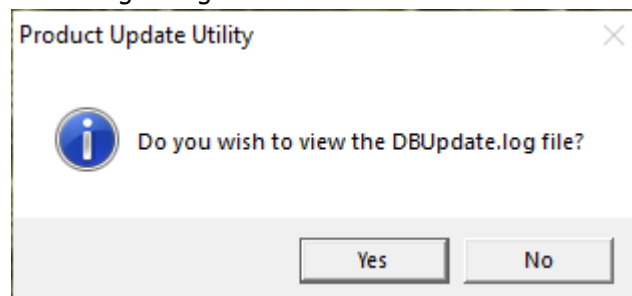
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.



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

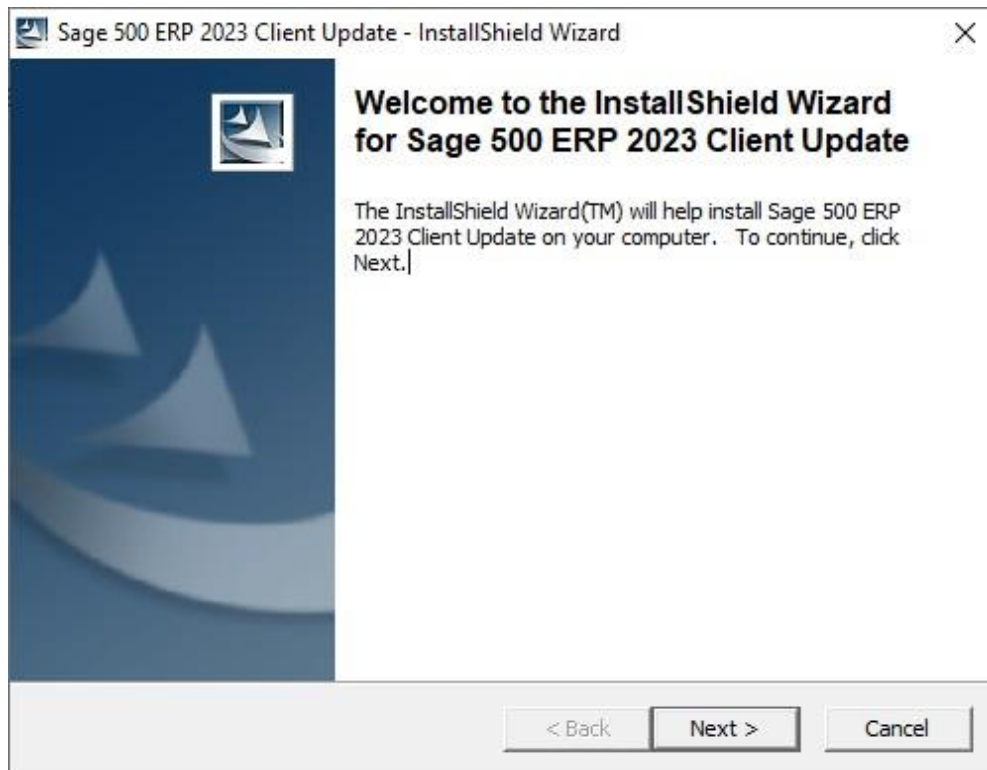


13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:

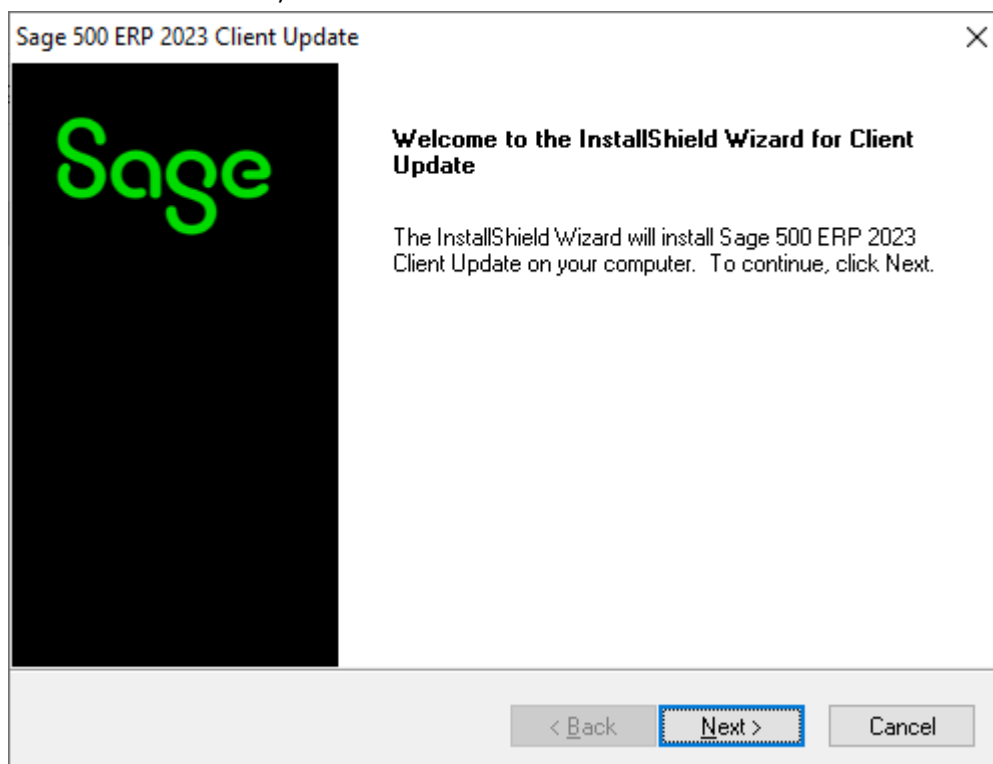


Installing the Client

1. To begin the Sage 500 ERP 2023 Client installation, double-click the **2023PU8C.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.

