

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

# **Release Notes**

**Version 8.30.3**

***Product Update 3***

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.

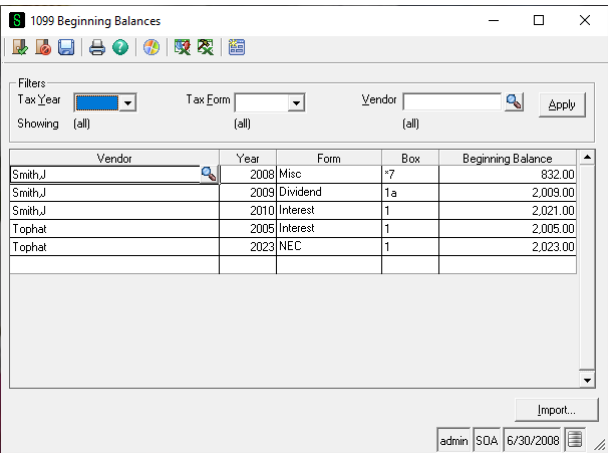
# Enhancements and Corrections

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

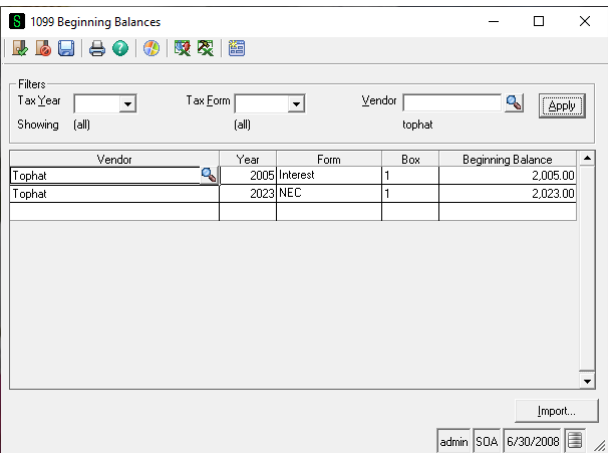
**\*Indicates a new enhancement or program fix in this Update. All new to Product Update 3 have been consolidated under one section "Product Update 3".**

## 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.



| Vendor | Year | Form     | Box | Beginning Balance |
|--------|------|----------|-----|-------------------|
| SmithJ | 2008 | Misc     | *7  | 832.00            |
| SmithJ | 2008 | Dividend | 1a  | 2,008.00          |
| SmithJ | 2010 | Interest | 1   | 2,021.00          |
| Tophat | 2005 | Interest | 1   | 2,005.00          |
| Tophat | 2023 | NEC      | 1   | 2,023.00          |



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

**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

The screenshot shows the '1099 Beginning Balances' application window. It features a toolbar with icons for file operations and a 'Filters' section with dropdown menus for 'Tax Year' and 'Tax Form', 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 SDA 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 'Tax Year' dropdown in the 'Filters' section is now set to '2010'. The table below shows only the entry for Smith,J in 2010:

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

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

## \* Product Update 3

| Issue ID | Module | Short Description                                                                               | Objects Modified - Client                               | Object Modified - Database  |
|----------|--------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------|-----------------------------|
| 50849    | PA     | PA does not report posting to closed fiscal period error                                        | LocalizationConst.BAS,<br>PAZGF001.frm,<br>pazgf001.dll | spimlsValidFiscPer.sql      |
| 50852    | IM     | Closed or Completed Work Orders are shown in Open Work Order Preview in the Maintain Items task | Preview.frm,<br>DataViewUtils.dll                       |                             |
| 50857    | SM     | Getting Unhandled Exception errors when clicking refresh using the Client Configuration utility | ClientConfig.vb,<br>ClientConfig.exe                    |                             |
| 50859    | AP     | Conversion error on EFT – Register/Post process                                                 |                                                         | spapGetNextTranNoForPmt.sql |
| 50863    | SM     | Grid Manager fails to allow all surrogate key values in a Farpoint grid defined as integer      | FPGrid.cls,<br>GridUtils.dll                            |                             |
| 50871    | GL     | GL Set Up Account Structure fails when shortening a segment for a new company                   | Glzmi001.frm,<br>Glzmi001.exe,<br>GLZMIDL1.dll          |                             |

### Special Note Regarding 50863:

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 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,<br>apzdn002.frm,<br>LocalizationConst.bas,<br>APZDN001.exe                                                                    | spAPTempVend1099Bal.sql,<br>Create Local Msg_100445.sql,<br>Create Local Msg_100446.sql |
| 50813    | AP     | Update 1099 application to handle new Aatrix AESCrypto.dll                                        | ap1099FormsSvcLnch.bas,<br>ap1099SvcAtx.frm,<br>ap1099FormsSvcLnch.dll,<br>ap1099FormsSvc.bas,<br>ap1099FormsSvc.frm,<br>ap1099FormsSvc.exe |                                                                                         |
| 50796    | SM     | CDO reference still in EMail and DocDist Projects                                                 | EmailUtils.vbp,<br>EmailUtils.dll<br>DocDistributionUtils.vbp,<br>CDocDist.cls<br>DocDistributionUtils.dll                                  |                                                                                         |
| 50803    | SO     | Sales Order Entry Screen closes after clicking Close (door) icon to close Inventory Status screen | imzqk001.frm,<br>imzqk001.exe                                                                                                               |                                                                                         |
| 50823    | IM     | IM Global Price Group Change Export to Excel is not working on Office 365                         | ExcelServices.cls<br>ExportUtil.dll                                                                                                         |                                                                                         |

### **SPECIAL NOTE:**

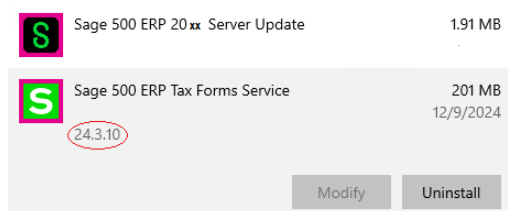
If you do not utilize 1099 functionality within Sage 500 ERP then you can ignore this special note.

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,<br>apzdn002.frm,<br>LocalizationConst.bas,<br>APZDN001.exe | spAPTempVend1099Bal.sql,<br>CreateLocalMsg_100445.sql,<br>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,<br>apzra001.exe,<br>apzradl1.dll                           |                                                                                     |
| 50675    | SO     | Limit Number of Orders to Pick does not retain when saving a setting in Create Picklist                                          | selectpickline.frm,<br>SOSelectPickLine.dll                              |                                                                                     |

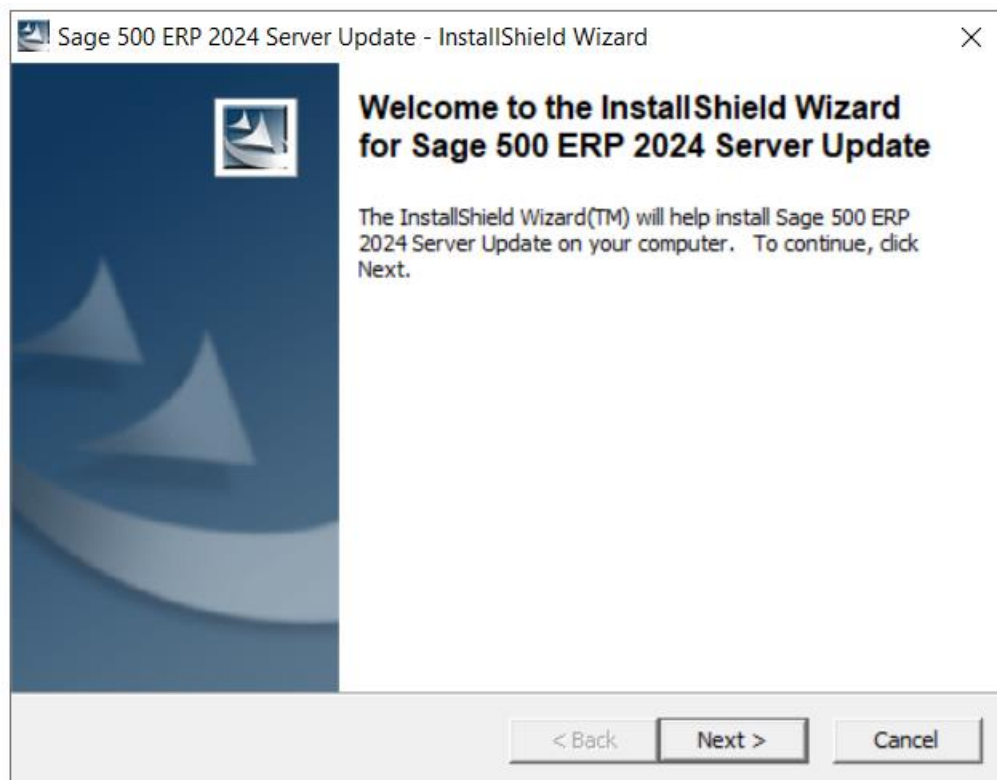
# Installation Instructions

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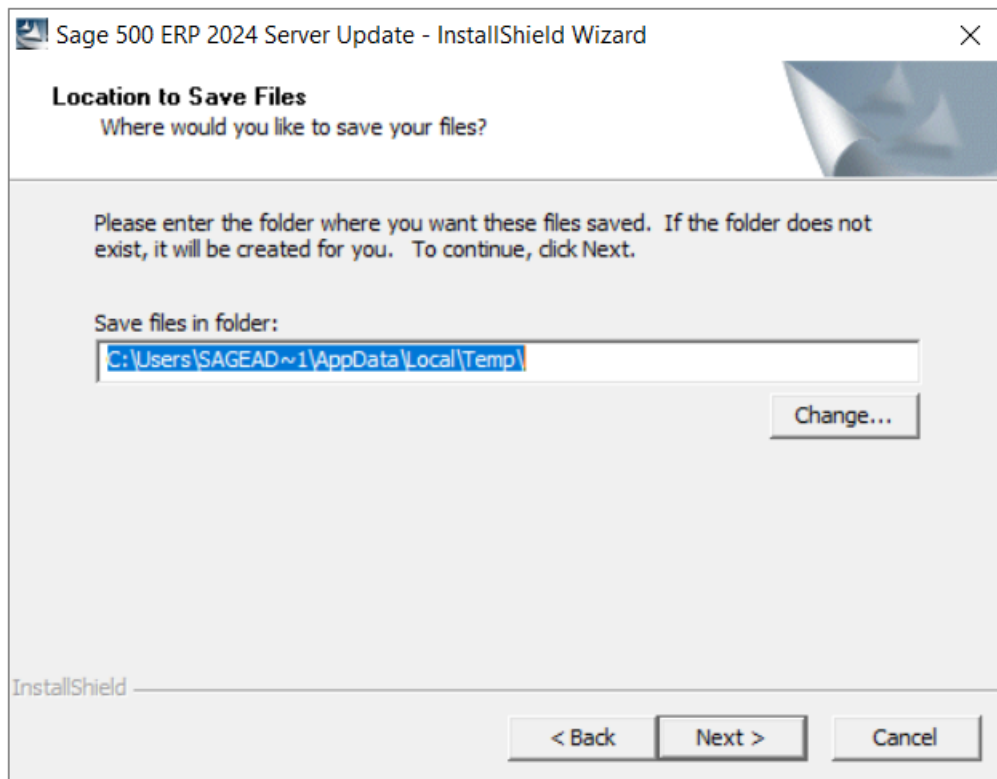
## Installing the Server

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

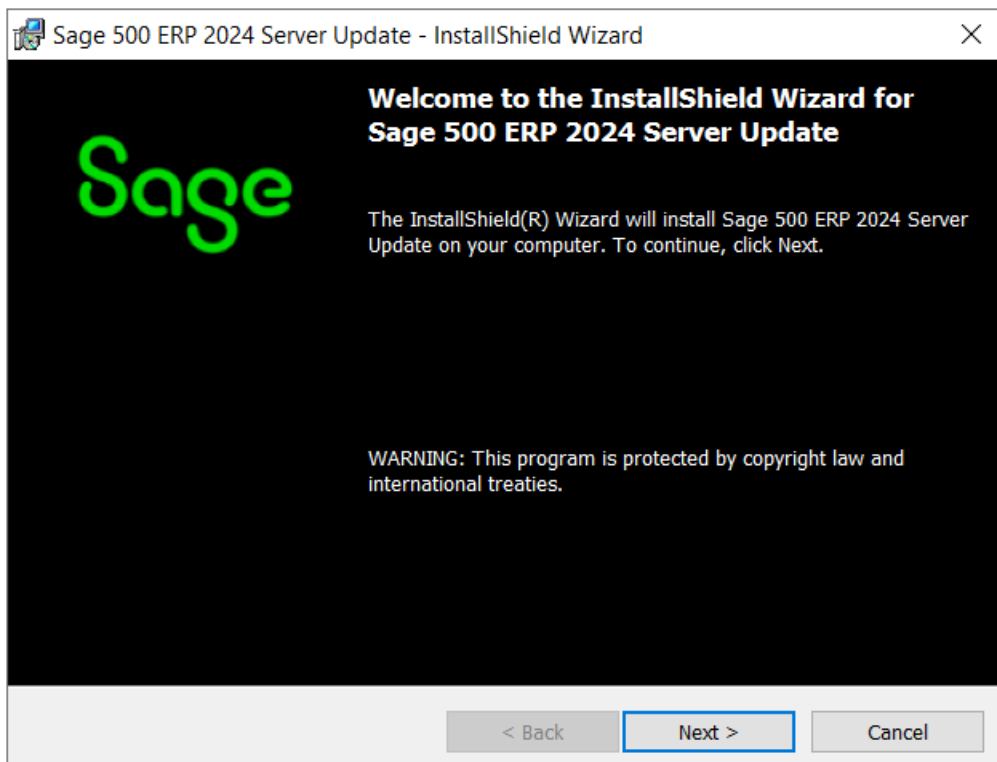
1. To begin the Sage 500 ERP 2024 Server installation, double-click **2024PU3S.exe** and click **Next** to proceed.



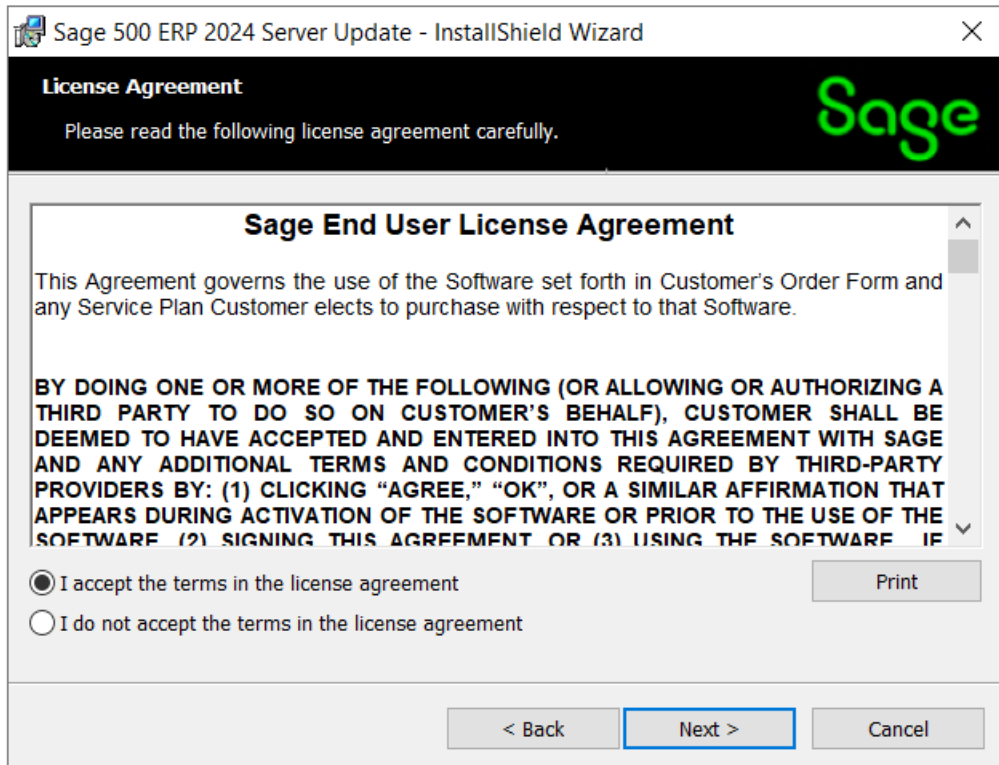
2. Indicate the location to which the installation files should be saved. Select the default location, or select **Change** to browse to a different location.



3. At the welcome screen, select **Next** to continue, or **Cancel** to exit setup.

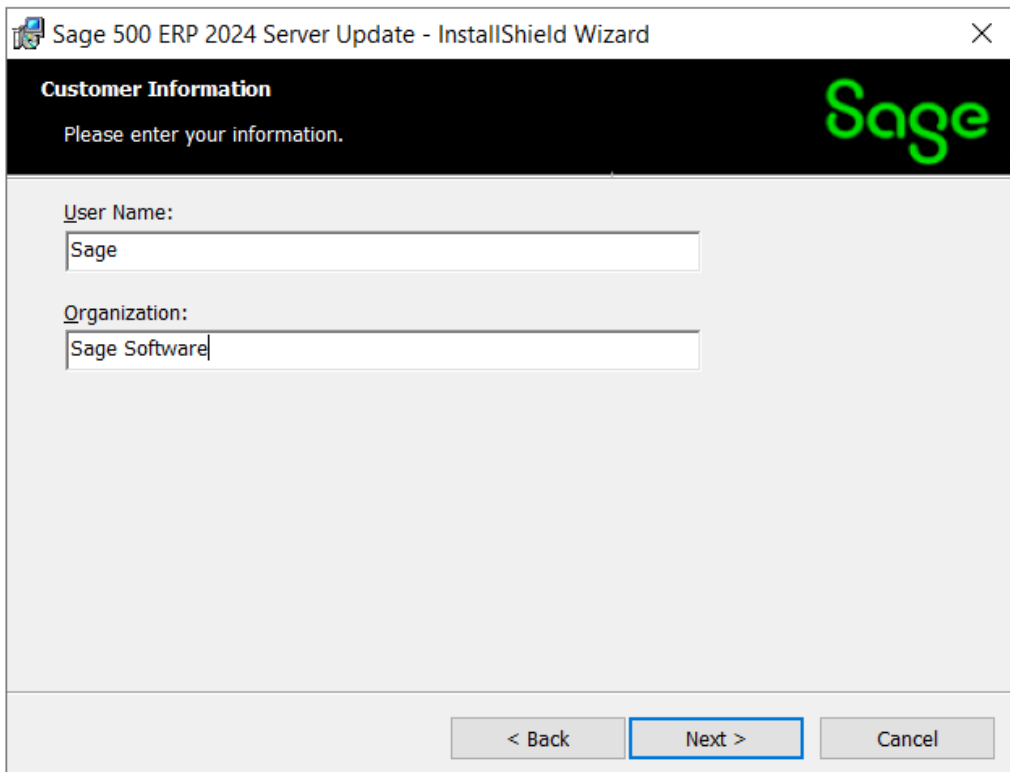


4. Read the License Agreement, select the Accept option and click **Next** to continue.



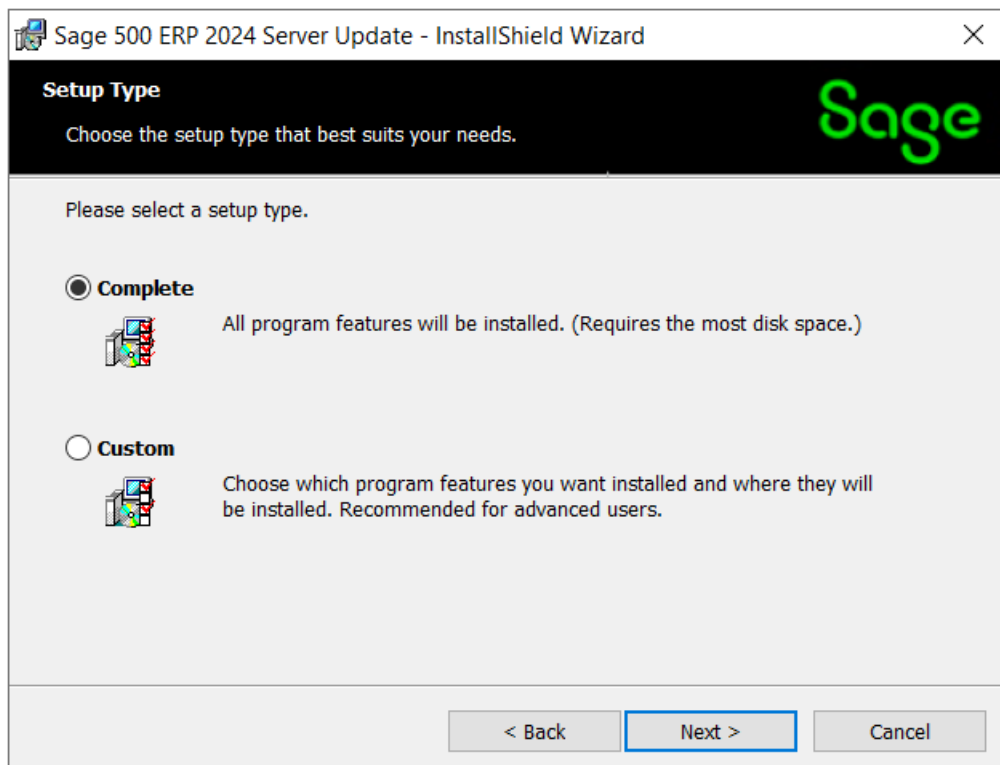
The screenshot shows the 'License Agreement' window of the Sage 500 ERP 2024 Server Update - InstallShield Wizard. The window has a black header bar with the Sage logo on the right. Below the header, the title 'License Agreement' is displayed in white, followed by the instruction 'Please read the following license agreement carefully.' 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 bolded 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) SIGNING THIS AGREEMENT OR (3) USING THE SOFTWARE IF'. At the bottom of the main content area, 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 these radio buttons is a 'Print' button. At the bottom of the window, there 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.

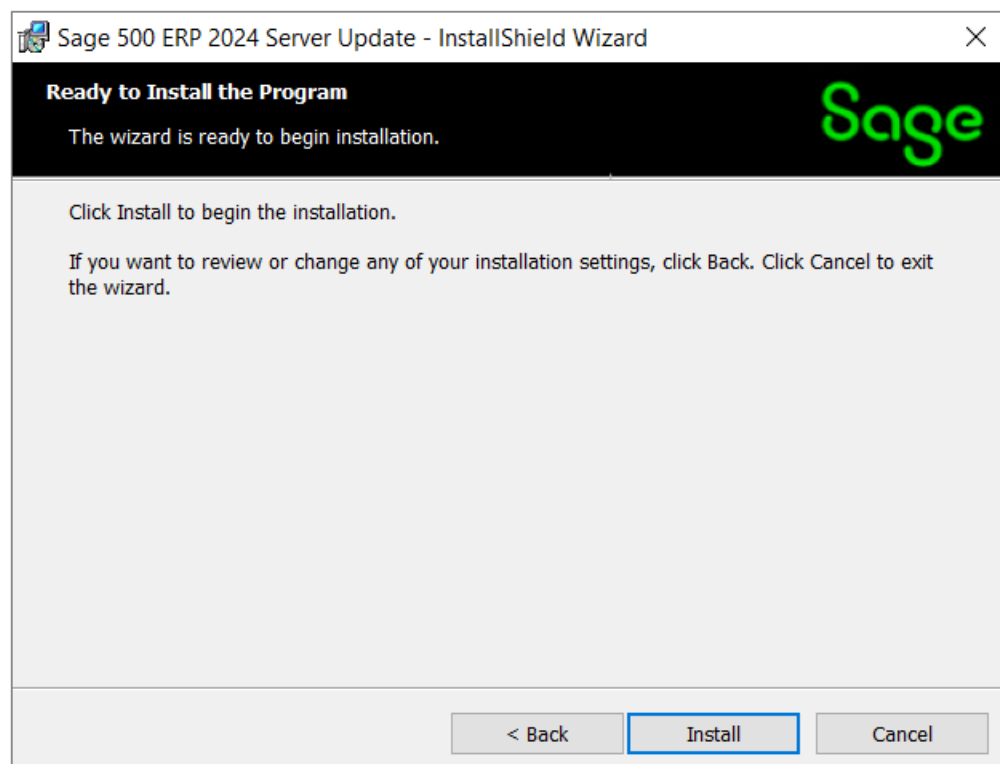


The screenshot shows the 'Customer Information' window of the Sage 500 ERP 2024 Server Update - InstallShield Wizard. The window has a black header bar with the Sage logo on the right. Below the header, the title 'Customer Information' is displayed in white, followed by the instruction 'Please enter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

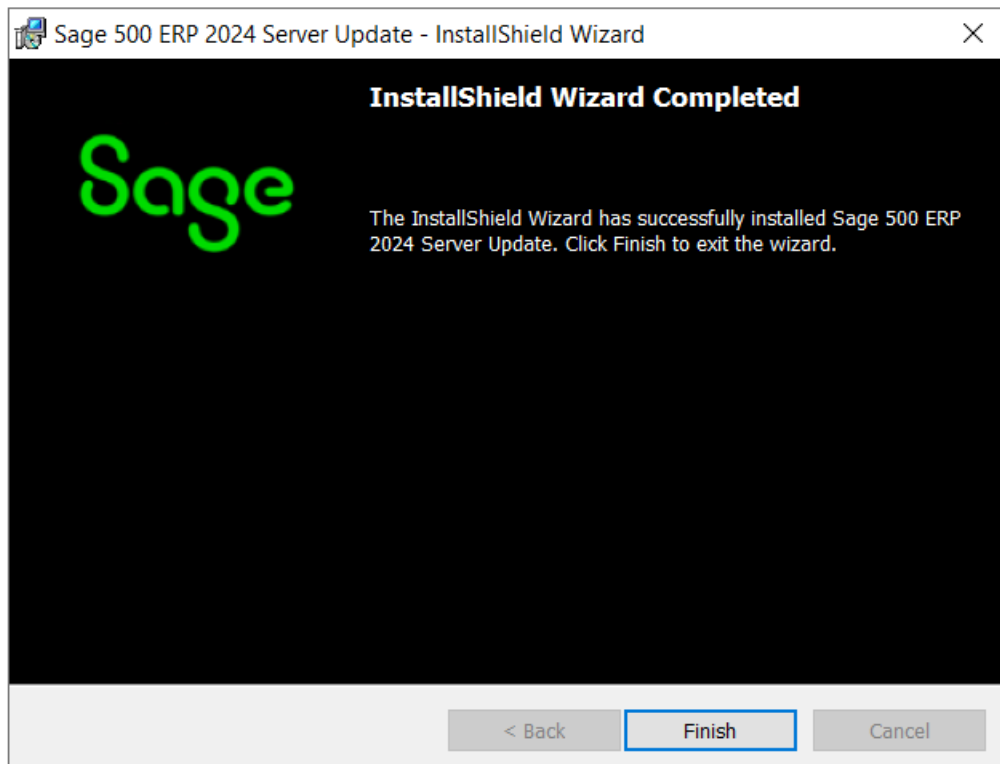
6. Select **Complete** and click **Next** to continue.



7. Click **Install** to continue.



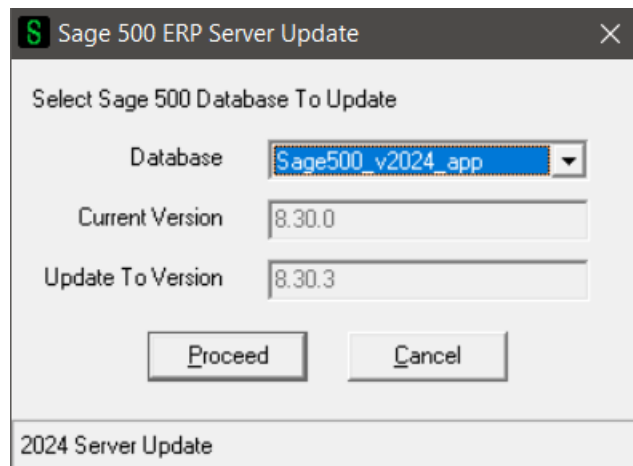
8. At the completion screen, click **Finish** to complete the Sage 500 ERP Server installation.



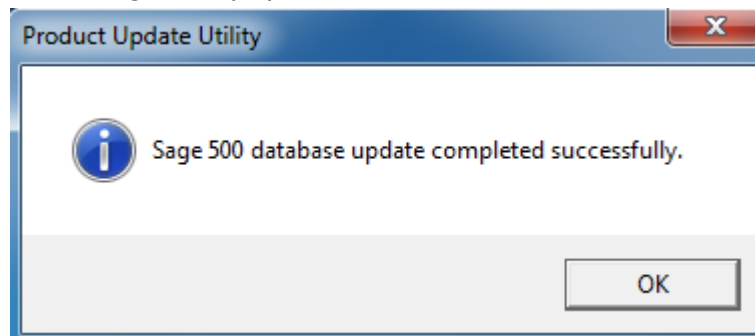
9. If you receive a message to restart the system, click **Yes** to continue. After the system has been restarted, select **Sage 500 ERP 2024 Product Update 3** from the Sage 500 ERP 2024 program group.
10. Enter the SQL Server Name and SQL Server sa password, select **Proceed** to continue.

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 "admin" and "Password" containing "xxxxxxxx". At the bottom are "Proceed" and "Cancel" buttons.

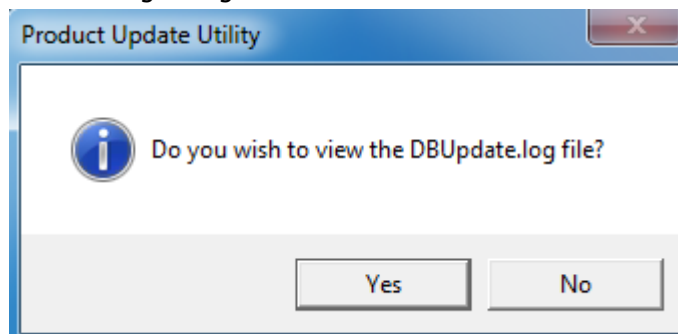
11. Enter the name of the Sage 500 ERP Application Database and select **Proceed** to continue.



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

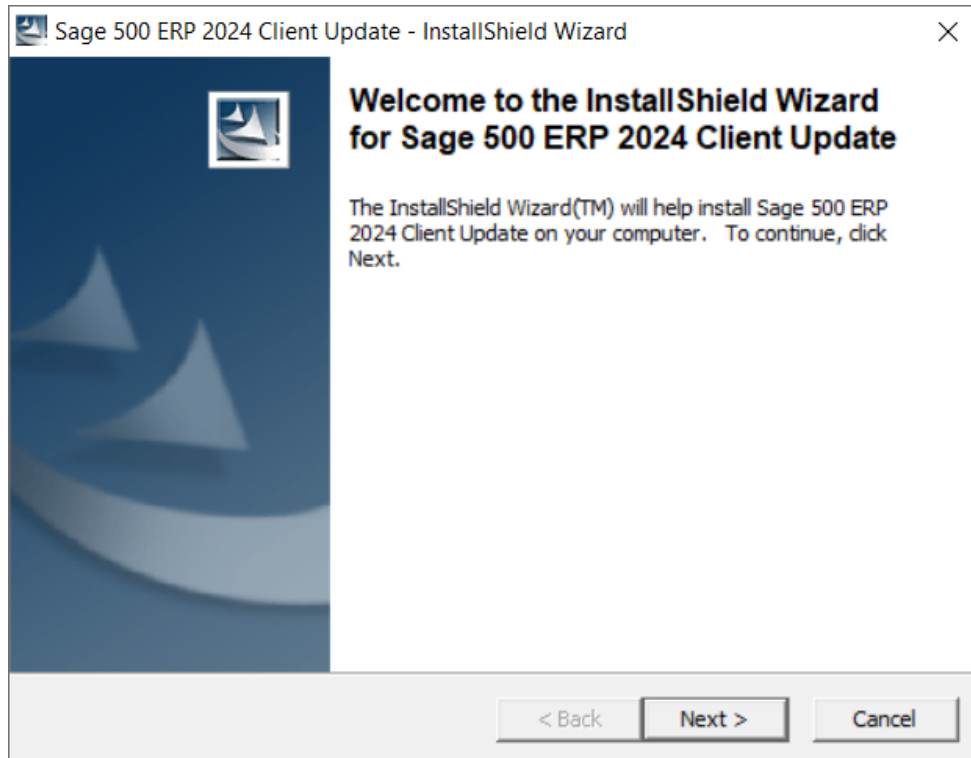


13. After applying the update to the Sage 500 ERP Database, you may view the updates by clicking **Yes** at the following dialog box:

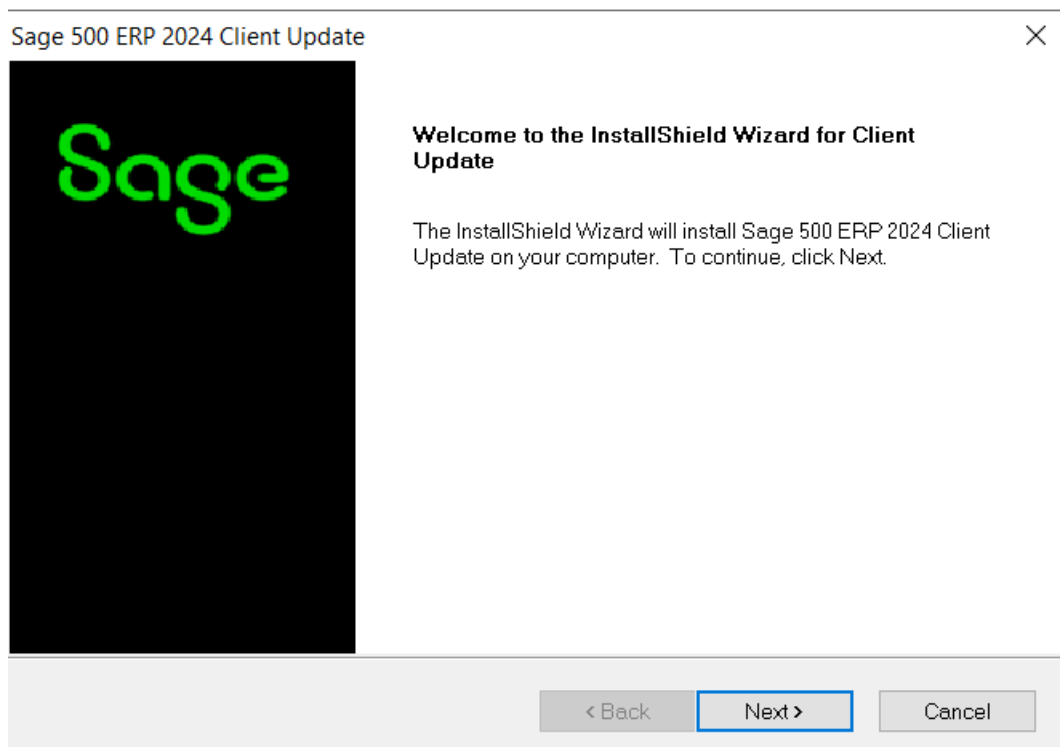


# Installing the Client

1. To begin the Sage 500 ERP 2024 Client installation, double-click the **2024PU3C.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.

