

2019 Year-End Software FAQ

Products

Sage 300 CRE 18 / 2018

Country

North America

Description

- Do I need to upgrade to version 18.4?
- Why do I need to upgrade to version 18.4?
- Answers to commonly asked questions regarding the 2019 year-end software.

Disclaimer

Support

Sage Customer Support does not provide assistance for issues related to third party products or enhancements, hardware, report customizations, state or federal tax-related questions, or specific accounting questions. Please contact your Sage business partner, network administrator, or accountant for assistance. Please review this document for additional information on the scope of Sage Customer Support Services.

Resolution

Why is Sage releasing only one year-end version?

By releasing only version 18.4 with the year-end changes, customers are upgrading to a version that has already been in the field for over a year with positive feedback (version 18.1 was initially released in May 2018). Sage can also concentrate our efforts on one software version to ensure a high quality release.

When will version 18.4 be released?

Version 18.4 will be released in early December.

Will versions 18.1, 18.2, or 18.3 be supported for year end?

Version 18.4 is the supported year-end version that contains the following software changes for U.S. Payroll:

- Compliance with 2019 U.S. year-end and quarter-end government-related forms.
- The revised U.S. Form W-4, effective Jan. 1, 2020.
- U.S. California Consumer Privacy Act (CCPA), effective Jan. 1, 2020.

I don't use Payroll, can I remain on version 18.1, 18.2, or 18.3 for 1099 and 1098 forms?

As of the writing of this FAQ (Nov. 21, 2019), there are no planned changes in Accounts Payable and Property Management for 1099 and 1098 forms. If you use Accounts Payable or Property Management

without Payroll, you can remain on version 18.1, 18.2, or 18.3 but remember to update the Aatrix forms before you generate 1099 and *1098 forms. Sage will notify you if there are last minute changes to government-related forms that require a software update.

If you want to use features or apply fixes that come with version 18.4, you can upgrade your software at any time.

*For form 1098, you must either be on 18.2.2 with the 18.2.2 2019 PM 1098 Hotfix applied (KB 95687) OR be on 18.3. In earlier versions, the amount for box 10 printed in box 9.

I use the Canadian edition of Sage 300 CRE. Do I need to upgrade to version 18.4 to process government-related forms?

As of the writing of this FAQ (Nov. 21, 2019), there are no planned changes in the Canadian version of the Payroll application for government reporting. You can remain on version 18.1, 18.2, or 18.3 but remember to update the Aatrix forms before generating government-related forms. Sage will notify you if there are last minute changes to government-related forms that require a software update.

If you want to use features or apply fixes that come with version 18.4, you can upgrade your software at any time.

I use the Canadian edition of Sage 300 CRE. Do I need to upgrade to version 18.4 to download and update the tax tables for 2020?

You can download and install the 2020 taxes for any version 18.

Can I upgrade to version 18.4 and still process 2019 payroll?

Yes, you can upgrade to version 18.4 and still process 2019 payroll. The new 18.4 tax calculation variables apply to the new W-4 amounts and the 2020 tax schedules; the Payroll application does not use them until you apply the 2020 tax updates. Remember to apply the 2020 tax updates after your last payroll in 2019 and you've closed the year in Payroll, and before processing your first payroll of 2020.

Because of timing, I am unable to upgrade to version 18.4 before my first payroll in 2020. Will the 2020 tax tables work for versions 18.1, 18.2, or 18.3?

You can download and install the 2020 taxes for any version 18. You can process your first 2020 payroll without being on version 18.4 **only if your employees have not completed and submitted the new W-4 form**. Sage urges you to upgrade to version 18.4 as soon as possible so that you are in compliance with the IRS. (<https://www.irs.gov/newsroom/faqs-on-the-draft-2020-form-w-4>)

Why can't I find any information on version 18.4 in the Release Notes on the Product Documents webpage?

The Release Notes document will be updated as soon as version 18.4 is released in early December. Watch for a post on Sage City. In the meantime, watch 2019 Year-end Release Highlights (version 18.4.1) (video) for an overview of what's new in version 18.4.

Why can't Sage release the year-end version earlier in the year?

The year-end version is a government compliance release. To account for last minute changes to the legislature or government requirements that occur late in the year, a December release time frame assures that Sage has incorporated all the known government-mandated changes for reporting and processing into the software.

What version of Sage Estimating is compatible with Sage 300 CRE version 18.4?

Sage Estimating (SQL) version 19.12, 19.11, and 18.12 are compatible with Sage 300 CRE version 18.4. Sage Estimating (Pervasive) is not compatible with Sage 300 CRE version 18.4 if both products are installed on the same machine.

Need help?

Chat with support (https://chat.na.sage.com/sdcxuser/rrn/issue_new.asp?Kernel::Kernel::sik_iss_type=ec7ecb20-40f2-43f5-9d0d-9d128ac9423b&enforceRequestType=yes&lf=kbarticle&qd=Sage%20300%20CRE%20Support)

Related resources

2019 Year-end Release Highlights (version 18.4.1) (video)

FAQ: California Consumer Privacy Act (CCPA)

Category

Tax forms

Upgrade

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