

Sage 100

2021 Year-End IRD Release Notes

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Introduction

Please read this entire document carefully. This document contains specific steps for a successful year- end update installation. Skipping any step may have irreversible results.

- See the [Installing Year-End Updates](#) section below and follow the required steps to ensure the accuracy of your data.
- Read the [Interim Release Download Read Me](#) section to review details of this Interim Release Download (IRD).

The 2021 IRD is compatible and applicable for **Sage 100 version 2019 with Update 5 (6.10.5)** installed.

Note: For later versions of Sage 100, the year-end changes described in this document were included in the following updates:

- Update 2 for Sage 100 2021 (7.00.2)
- Update 4 for Sage 100 2020 (6.20.4)

Important Reminders

- You must install the 2021 IRD and the year-end Aatrix update before processing year-end tax forms for 2021. It does not matter which update is installed first.
- In all companies verify that Accounts Payable data entry files are not in progress before installing the 2021 IRD.
- Make a backup of the entire ..MAS90 folder on the server before installing the 2021 IRD.
- All users must exit out of Sage 100 before installing the IRD.
- If you have any third-party modifications installed, please contact the developer to confirm the modification program is compatible with the 2021 IRD. Also, verify if the modification will need to be reinstalled after installing the 2021 IRD.

Installing Year-End Updates

Update 5 for Sage 100 2019 (6.10.5) must be installed before you can install the 2021 IRD.

IRD Installation Steps

1. Log into the [Sage Knowledgebase](#).
2. In the **Search field**, type **Download Sage 100 IRD for 2021**, and then press **Enter**.

3. Open the applicable article, and then click the **Download** button.
4. Click **Save** or **Save As**. Make note of the location where the file is saved.
5. Go to the location noted, and open **Sage 100 End of Year IRD2021** folder.
6. Double-click the **Sage 100 End of Year IRD2021.exe** file.
7. Click **Run**. Click **Next** and follow the on-screen instructions
8. Install the IRD in the ...\\MAS90 folder **on the server**.
9. To verify that the IRD was successfully installed, do the following in Sage 100:
 - a. Expand **Library Master, Reports, Activity Log**.
 - b. Click **Preview**.
 - c. Look for the description of **Sage 100 End of Year IRD2021**.

1099 Form Tax Reporting (Aatrix) year-end update

- The Aatrix year-end update is scheduled each year on December 20th at the latest.
- The Aatrix update must be installed on each workstation that has Federal and State Tax Reporting installed.
- When you access any Tax Reporting task in Sage 100, you will be prompted to install an Automatic Update. Install this update for all applicable form changes. For more information, see [article ID 18851](#) in the Sage Knowledgebase.

IRD Details

To print or electronically file 1099 (DIV, INT, MISC or NEC) forms, use the following task in Sage 100:

- Accounts Payable > Reports > Form 1099 Tax Reporting

The 2021 IRD contains the following enhancements for Accounts Payable:

- Form 1099 Tax Reporting version has been updated to 2.95.
- The following new 2021 boxes will be available for all companies in your installation after installing the 2021 IRD.
 - 1099-DIV Form changes for tax year 2021:
 - Box 2e was added for Section 897 Ordinary Dividends
 - Box 2f was added for Section 897 Capital Gain

- 1099-MISC Form change for tax year 2021:
 - Box 11 was added for Fish Purchased for Resale
- 1099-NEC Form change for tax year 2021
 - No changes were made in Sage 100. After the Aatrix update is installed, if the Payer Made Direct Sales of \$5,000 + checkbox in Vendor Maintenance is selected for the 2021 1099-NEC form, an X will print in Box 2 on the form.
- 1099-INT Form changes for tax year 2021:
 - No changes were required for 1099-INT Form for tax year 2021.

Note: If boxes were previously created (in the SY_1099Setup file) using the Form 1099 Box Maintenance utility, this IRD will overwrite those records in SY_1099Setup, but it **will not** affect any paid-to-date dollar amounts already stored for the tax year 2021 in the AP_1099VendorPayments file.

Using the Form 1099 Box Maintenance Utility

If the new boxes were manually created, before you install the 2021 IRD, use the Form 1099 Box Maintenance utility to verify that the boxes were created correctly regarding whether alpha characters are allowed.

Select the **Text Field** checkbox if alpha characters are allowed in the selected 1099 box. Clear the checkbox if only numeric characters are allowed.

Follow these steps to start the utility.

1. On the Sage 100 **File** menu, click **Run**. The Sage 100 Program window opens.
2. In the **Program** field, type **SY_1099maint_ui** and then click **OK**.
3. In the message window, click **OK**. The Form 1099 Box Maintenance utility opens.

For more information on the utility, press **F1** in any field to open the help.