

2017 Year-End Update Release Notes for Sage 100

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

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

The 2017 IRD is only compatible and applicable for the following Sage 100 versions:

- 2017 Update 1 (5.40.1) and above
- 2016 Update 3 (5.30.3) and above
- 2015 Update 5 (5.20.5) and above

Note: The 2017 IRD is not compatible with Sage 100 2018 or Payroll 2.17 or 2.18

Important Reminders:

- You must install the 2017 IRD and the year end eFiling (Aatrix) update before processing year-end tax forms. It does not matter which update is installed first, just as long as both updates have been installed before processing year-end tax forms for tax filing year 2017.
- Verify in **all** companies that Payroll and/or Accounts Payable **data entry files** are not in progress *before* installing the 2017 IRD.
- Make a backup of the entire... \MAS90 directory on the server prior to installing 2017 IRD.
- All users must exit out of Sage 100 before installing IRD.
- If you have any 3rd party modifications installed, please contact the developer to confirm the modification program is compatible with the 2017 IRD. Also, verify if the modification will need to be reinstalled after installing the 2017 IRD.
- **For Payroll customers:** **After** installing the 2017 IRD and printing 2017 W2s, you will need to update your Payroll Tax Tables by installing the 2018-Q1 Tax Table Update (TTU), which is located on the [Sage Support Portal](#), by searching for knowledgebase article [45726](#) and then clicking the [Download 2018-Q1 Tax Table Update for Sage 100 KB under the Related Resources section](#).



TIP! A user guide on how to process W2, ACA and 1099 forms can be downloaded from the Sage Support Portal (www.Sage.NA.Support.com). In the Search field type **53295** and click **Search** button or click [here](#) to access the knowledgebase article.

Installing Year-End Updates

The following are the **required minimum Sage 100 versions**. If you are **not** at least on one of the minimum versions below, you **must** install the required update before installing the 2017 Interim Release Download (IRD).

- 2017 Update 1 (5.40.1)
- 2016 Update 3 (5.30.3)
- 2015 Update 5 (5.20.5)

Note: The 2017 IRD is not compatible with Sage 100 2018 or Payroll 2.17 or 2.18

2017 IRD Installation steps:

1. Log into [Sage Support Portal](#)
2. Click **Search**, type **Download Sage 100 IRD for 2017** and click **Search**
3. Click the **Download** button
4. Click **Save** or **Save As**. Make note of the location saved
5. Go to the location noted, and open **Sage 100 End of Year IRD2017** folder
6. Double-click the file named **Sage 100 End of Year IRD2017.exe**
7. Click **Run**. Click **Next** and follow the on-screen instructions
8. Install the IRD to the ...\\MAS90 folder **on the server**
9. To verify 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 **Installed 2017 End of Year Changes**

Aatrix year-end update:

- The Aatrix year end update is being **released on December 12th**.
- The eFiling update is installed separately on each workstation that has State/Federal eFiling & Reporting installed.
- When you access any one of the eFiling and Reporting tasks in Sage 100, you will be prompted to install an “Automatic Update”; this will update all applicable form changes. For more information, see *knowledgebase article [How to install, activate, update and uninstall Federal and State eFiling and Reporting](#)* (KB ID 18851).

Interim Release Download (IRD) Read Me

Release date: December 14, 2017

In order to print or electronically file W2, ACA or 1099 forms, you will need to use the following menu tasks:

- **Payroll tax forms** (*i.e.* W2, 1095/94, 941, 940): Payroll > Period End > Federal eFiling and Reporting
- **1099 (MISC, DIV & INT) forms**: Accounts Payable > Reports > Form 1099 eFiling and Reporting

ACCOUNTS PAYABLE:

The 2017 IRD contains the following enhancements for Accounts Payable:

- The new 2017 boxes will be available for all companies in the installation after installing the 2017 IRD

Note: If these boxes were previously created (in the SY_1099Setup file) using the SY_1099Maint_UI utility, this IRD will overwrite those records in SY_1099Setup, but **will not** affect any paid-to-date dollar amounts already stored for the tax year 2017 in the data file AP_1099VendorPayments. Note if the new boxes were manually created using the utility, prior to installing the 2017 IRD, the user should use the SY_1099Maint_UI utility to verify that the boxes were created correctly as a text or non-text field (Text Field) in the Form 1099 Box Maintenance window, and make corrections as necessary.

No changes were required to forms 1099-DIV, 1099-INT and 1099-MISC for tax year 2017

- Form 1099 eFiling and Reporting version has been updated to 2.63
- In Form 1099 Tax eFiling and Reporting for 1099-MISC forms, a Tax Account Number is no longer required if there is no state income to report. (Defect 108516, PER 87866).

PAYROLL:

The 2017 IRD contains the following enhancements for Payroll:

- There were no W-2 form changes for 2017
- Federal and State eFiling and Reporting version has been updated to 2.63
- Box 12 code FF is available in Deduction Code Maintenance. Code FF is a permitted benefit for a qualified small employer health reimbursement arrangement (QSEHRA).
- ACA Form 1095-C is now created in Federal eFiling and Reporting for employees with ACA information set up but no paychecks for the current year. (Defect 107120, PER 82504)