



Sage 300 U.S. Payroll

Q4 2023 Release Notes

December 2023

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Product update release notes

Important! All customers who update, maintain, and use Sage 300 U.S. Payroll should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Important! If you are using Sage 300 Web Screens AND you install Sage 300 version 2024 Product Update 1 after the US or Canadian Q4 2023 Payroll Tax Update, make sure you apply the recent hotfix. For more information about this hotfix, see Solution ID [231213165156483](#).

Product update information

Product: Sage 300 U.S. Payroll

Version: Product Update Q4 2023

If we receive additional payroll tax changes for this period and/or this year, a new update will be made available.

Software requirements

To use this product update, you must have Sage 300 U.S. Payroll 7.3 or 8.0, which is supported in Sage 300 2024, 2023, 2022, and 2021.

Payroll 8.0

As of Sage 300 2024 in September 2023, there is a new version of Payroll, 8.0. The tax tables for Payroll 7.3 will be available until March 2024. After this date, tax tables and support will only be available for Payroll 8.0.

Important! If you are upgrading from Payroll 7.3 to Payroll 8.0, make sure you have the latest Payroll 8.0 Tax Update. There might be an activation issue if not using the latest Payroll 8.0 Tax Update.

Note: If you are using an older version of Sage 300, please reach out to your Business Partner for your upgrade options.

	Sage 300 2024	Sage 300 2023	Sage 300 2022	Sage 300 2021
Payroll versions supported up to March 2024	7.3 & 8.0	7.3 & 8.0	7.3 & 8.0	7.3 & 8.0
Payroll versions supported after March 2024	8.0	8.0	8.0	8.0

Support and resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Help and documentation:** Many answers to common questions can be found in the help and documentation included with Sage 300. Visit the [Sage 300 Product Documents website](#) for access to more documents.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Community Hub Year-End Center:** Visit <https://communityhub.sage.com/p/yearend> for help, guidance, documents, and downloads specific to Sage 300 Payroll and Year End 2023.
- **Community Hub:** Visit <https://communityhub.sage.com/us> for blogs, tips, and guidance specific to Sage 300.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at <https://us-kb.sage.com/portal/ss/> or contact Customer Support at 800-253-1372 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.
- **Tax forms:** Because all printed forms have variations, Sage 300 Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at www.SageChecks.com.

Tip: For information about ordering W-2 forms, see Knowledgebase article 40172: [Which forms should I order for year-end?](#)

Payroll Tax Updates

The following federal, state, and local tax changes are included in this update.

Federal Legislative Updates

Federal Withholding Tax Changes for 2024

The IRS released draft withholding and allowance amount tables for wages paid on or after January 1, 2024.

Social Security Wage Base Changes for 2024

For 2024, the maximum amount of earnings subject to the Social Security tax (taxable maximum) is \$168,600.

State and Local Legislative Updates

This section lists state and local legislative updates available with this release. If a state or locality is not listed in this section, there are currently no tax updates or product modifications for that state or locality.

Note: Sage 300 U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.

If you use custom tax codes to capture SDI taxes, note the following:

- If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
- If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.

- Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.

Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Alabama

Effective January 1, 2024, the Alabama Department of Revenue has issued guidance to exempt overtime pay from state income tax.

For more information, see Solution ID: [231211185204510](#).

Arkansas

Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

California

- California withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- State disability insurance tax (CASDI) information is updated for 2024. Effective for wages paid on or after January 1, 2024:
 - The withholding rate is 1.1%.
 - The taxable wage limit has been removed for 2024.

Colorado

- The Unemployment Insurance wage base limit changes to \$23,800 for 2024.
- Colorado withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Connecticut

- For the Colorado Paid Family and Medical Leave plan, the wage base limit changes to \$168,600 for 2024.

For more information, including details about setting up payroll codes, see Sage Knowledgebase article [225924650095277](#).

Connecticut

- The Unemployment Insurance wage base limit changes to \$25,000 for 2024.
- Connecticut withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- For the Connecticut Paid Family and Medical Leave plan, the wage base limit changes to \$168,600 for 2024.

For more information, including details about setting up payroll codes, see Solution ID [220924660108247](#).

Idaho

The Unemployment Insurance wage base limit changes to \$53,500 for 2024.

Indiana

- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
IN0012	Vanderburgh 82 CO Regular (NR) IT	1.25%	10/01/2023
IN0060	Henry 33 CO Regular (NR) IT	1.8%	10/01/2023
IN0078	Dearborn 15 CO Regular (NR) IT	1.4%	10/01/2023
IN0081	Clinton 12 CO Regular (NR) IT	2.65%	10/01/2023
IN0092	Adams 01 CO Regular (NR) IT	1.6%	10/01/2023
IN0103	Vanderburgh 82 CO Regular IT	1.25%	10/01/2023
IN0152	Henry 33 CO Regular IT	1.8%	10/01/2023

Illinois

Code	Description	Rate	Effective Date
IN0170	Dearborn 15 CO Regular IT	1.4%	10/01/2023
IN0173	Clinton 12 CO Regular IT	2.65%	10/01/2023
IN0184	Adams 01 CO Regular IT	1.6%	10/01/2023

Illinois

The Unemployment Insurance wage base limit changes to \$13,590 for 2024.

Iowa

The Unemployment Insurance wage base limit changes to \$38,200 for 2024.

Kentucky

- The Unemployment Insurance wage base limit changes to \$11,400 for 2024.
- Kentucky withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0033	Clinton CT Regular IT	1%	01/01/2024
KY0104	Springfield CT Regular IT	1.5%	01/01/2024
KY0142	Mercer CO Regular IT	1%	01/01/2024
KY0187	Elizabethtown CT Regular IT	1.95%	01/01/2024
KY0206	Bowling Green CT Regular IT	2%	01/01/2024
KY0213	Ballard CO Regular IT	1.5%	01/01/2024
KY0278	Kuttawa CT Regular IT	1.5%	10/01/2024
KY0281	Adair CO Regular IT	0.5%	01/01/2024
KY0282	Lyndon CT Regular IT	1%	01/01/2024

- Wage base limits have been updated for the following local taxes:

Massachusetts

Code	Description	Wage base limit	Effective Date
KY0009	Highland Heights CT Regular IT	\$168,600	01/01/2024
KY0013	Newport CT Regular IT	\$168,600	01/01/2024
KY0016	Kenton CO Regular IT	\$168,600	01/01/2024
KY0020	Florence CT Regular IT	\$168,600	01/01/2024
KY0022	Crestview Hills CT Regular IT	\$168,600	01/01/2024
KY0023	Covington CT Regular IT	\$168,600	01/01/2024
KY0024	Cold Spring CT Regular IT	\$168,600	01/01/2024
KY0025	Campbell CO Regular IT	\$168,600	01/01/2024
KY0027	Boone CO Regular IT	\$75,233	01/01/2024
KY0029	Alexandria CT Regular IT	\$168,600	01/01/2024
KY0093	Wilder CT Regular IT	\$168,600	01/01/2024
KY0096	Warsaw CT Regular IT	\$168,600	01/01/2024
KY0161	Jackson CT Regular IT	\$168,600	01/01/2024
KY0178	Fort Wright CT Regular IT	\$168,600	01/01/2024
KY0188	Edmonton CT Regular IT	\$168,600	01/01/2024
KY0198	Carroll CO Regular IT	\$250,000	01/01/2024
KY0204	Breathitt CO Regular IT	\$168,600	01/01/2024
KY0276	Union CT Regular IT	\$168,600	01/01/2024
KY0279	Campbell CO Mental Health Regular IT	\$168,600	01/01/2024
KY0280	Campbell CO Senior Citizens Regular IT	\$50,000	01/01/2024

Massachusetts

For the Massachusetts Paid Family and Medical Leave plan, the wage base limit changes to \$168,600 for 2024.

For more information, including details about setting up payroll codes, see Solution ID [225924650095277](#).

Maine

Maine withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Michigan

Michigan withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Missouri

- The Unemployment Insurance wage base limit changes to \$10,000 for 2024.
- Missouri withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Montana

- The Unemployment Insurance wage base limit changes to \$43,000 for 2024.
- Montana withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.
- Effective January 1, 2024, the MW-4 Form has been redesigned and the following filing statuses have been added:
 - Single or Married Filing Separately
 - Married Filing Jointly or Qualifying Widower
 - Head of Household
 - Married Filing Jointly with Multiple Jobs
 - Single using MW-4 form 2023 or earlier
 - Married using MW-4 form 2023 or earlier
- Existing employees will be updated to use either Single using MW-4 form 2023 or earlier or Married using MW-4 form 2023 or earlier. Montana Department of Revenue

Nebraska

encourages all employees to submit a new Form MW-4 for Tax Year 2024 to adjust the amount of wage withholding to more accurately reflect the employee's Montana tax liability.

Nebraska

Nebraska withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Nevada

The Unemployment Insurance wage base limit changes to \$40,600 for 2024.

New Jersey

- The Unemployment Insurance wage base limit changes to \$42,300 for 2024.
- State disability insurance tax information is updated for 2024. Effective for wages paid on or after January 1, 2024:
 - For employees:
 - The disability insurance rate is 0%.
 - The family leave insurance rate is 0.09%.
 - The taxable wage limit is \$161,400 for each employee per calendar year.
 - For employers:
 - The Disability Insurance rate is set by the state for each employer individually.
 - The taxable wage limit is \$42,300 for each employee per calendar year.

For more information about setting up state disability and family leave insurance taxes for 2024, see Solution ID [220924260102273](#) and [220924660108199](#).

New Mexico

- The Unemployment Insurance wage base limit changes to \$31,700 for 2024.
- New Mexico withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

New York

- The Unemployment Insurance wage base limit changes to \$12,500 for 2024.
- There are changes in the New York Paid Family Leave for 2024. Refer to the state publication for more details.

For more information, see Sage Knowledgebase article [225924450088150](#).

North Dakota

North Dakota withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Ohio

- Ohio withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH0375	Willard CT Regular IT	1.75%	01/01/2024
OH0893	Mercy West JEDD III CT	1.5%	10/01/2023

Oklahoma

Code	Description	Rate	Effective Date
	Regular IT		
OH1060	Blanchester 1401 SD Regular IT	1.0%	01/01/2024
OH1061	Marion 5403 SD Regular IT	0.5%	01/01/2024
OH0140	Dalton VI Regular IT	1.5%	01/01/2024
OH0150	Lebanon CT Regular IT	1.5%	01/01/2024
OH0205	Wilmot VI Regular IT	1.75%	01/01/2024
OH0211	Hartville VI Regular IT	1.5%	01/01/2024
OH0233	Shelby CT Regular IT	1.75%	01/01/2024
OH0276	New Concord VI Regular IT	2.25%	01/01/2024
OH0307	Saint Henry VI Regular IT	1.5%	01/01/2024

- Wage base limits have been updated for the following local taxes:

Code	Description	Wage base limit	Effective Date
OH0891	Green TP JEDD II CT Regular IT	\$133,199	01/01/2024
OH0892	Green TP Western Ridge JEDD CT Regular IT	\$140,616	01/01/2024
OH0893	Mercy West JEDD III CT Regular IT	\$103,700	01/01/2024
OH0948	Harrison Greene JEDD IV CT Regular IT	\$129,419	01/01/2024
OH0971	UDF-North Bend JEDD V CT Regular IT	\$124,763	01/01/2024
OH1007	McAlisters JEDD VI CT Regular IT	\$121,957	01/01/2024

Oklahoma

- The Unemployment Insurance wage base limit changes to \$27,000 for 2024.
- Oklahoma withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Oregon

- The Unemployment Insurance wage base limit changes to \$52,800 for 2024.
- Oregon withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- There are changes for Oregon Paid Family and Medical Leave for 2024.

For more information, including details about setting up related local tax codes, see Solution ID [221924660117849](#).

- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OR0005	Tri-Met Transit District Excise Tax	0.8137%	1/1/2024
OR0006	Lane County Transit District Excise Tax	0.79%	1/1/2024
OH0140	Dalton VI Regular IT	1.5%	1/1/2024
OH0150	Lebanon CT Regular IT	1.5%	1/1/2024
OH0205	Wilmot VI Regular IT	1.75%	1/1/2024
OH0211	Hartville VI Regular IT	1.5%	1/1/2024
OH0233	Shelby CT Regular IT	1.75%	1/1/2024
OH0276	New Concord VI Regular IT	2.25%	1/1/2024
OH0307	Saint Henry VI Regular IT	1.5%	1/1/2024

Pennsylvania

Effective December 31, 2023, the following tax codes have been expired:

Code	Description
PA0007	W Lampeter Anx TP, Lampeter-Strbg SD (NR) LST
PA0008	E Lampeter Anx TP, Conestoga Vly SD (NR) LST
PA0437	Young TP, Blairsville-Saltsburg SD (NR) LST
PA0443	Saltsburg BO, Blairsville-Saltsburg SD (NR) LST

Pennsylvania

Code	Description
PA0462	Black Lick TP, Blairsville-Saltsburg SD (NR) LST
PA1766	Loyalhanna TP, Blairsville-Saltsbrg SD (NR) LST
PA2134	Conemaugh TP, Blairsville-Saltsburg SD (NR) LST
PA2137	Burrell TP, Blairsville-Saltsburg SD (NR) LST
PA2138	Blairsville BO, Blairsville-Saltsburg SD (NR) LST
PA2583	W Lampeter Anx TP, Lampeter-Strbg SD (NR) Regular IT
PA2584	W Lampeter Anx TP, Lampeter-Strbg SD Regular IT
PA2585	E Lampeter Anx TP, Conestoga Vly SD (NR) Regular IT
PA2586	E Lampeter Anx TP, Conestoga Vly SD Regular IT
PA3941	Young TP, Blairsville-Saltsburg SD (NR) Regular IT
PA3942	Young TP, Blairsville-Saltsburg SD Regular IT
PA3957	Saltsburg BO, Blairsville-Saltsburg SD (NR) Regular IT
PA3958	Saltsburg BO, Blairsville-Saltsburg SD Regular IT
PA3989	Conemaugh TP, Blairsville-Saltsburg SD (NR) Regular IT
PA3990	Conemaugh TP, Blairsville-Saltsburg SD Regular IT
PA4003	Burrell TP, Blairsville-Saltsburg SD (NR) Regular IT
PA4004	Burrell TP, Blairsville-Saltsburg SD Regular IT
PA4009	Blairsville BO, Blairsville-Saltsburg SD (NR) Regular IT
PA4010	Blairsville BO, Blairsville-Saltsburg SD Regular IT
PA4011	Black Lick TP, Blairsville-Saltsburg SD (NR) Regular IT
PA4012	Black Lick TP, Blairsville-Saltsburg SD Regular IT
PA4309	Loyalhanna TP, Blairsville-Saltsbrg SD (NR) Regular IT
PA4310	Loyalhanna TP, Blairsville-Saltsbrg SD Regular IT

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA1388	Conoy TP, Elizabethtown SD	\$52	1/1/2024

Code	Description	Rate	Effective Date
	(NR) LST		
PA7966	Black Lick TP, River Valley SD Regular IT	1.25%	1/1/2024
PA7967	Black Lick TP, River Valley SD (NR) Regular IT	0.5%	1/1/2024
PA7968	Black Lick TP, River Valley SD (NR) LST	\$52	1/1/2024
PA7969	Blairsville BO, River Valley SD Regular IT	1.25%	1/1/2024
PA7970	Blairsville BO, River Valley SD (NR) Regular IT	1.0%	1/1/2024
PA7971	Blairsville BO, River Valley SD (NR) LST	\$52	1/1/2024
PA7972	Burrell TP, River Valley SD Regular IT	1.25%	1/1/2024
PA7973	Burrell TP, River Valley SD (NR) Regular IT	0.5%	1/1/2024
PA7974	Burrell TP, River Valley SD (NR) LST	\$52	1/1/2024
PA7975	Conemaugh TP, River Valley SD Regular IT	1.25%	1/1/2024
PA7976	Conemaugh TP, River Valley SD (NR) Regular IT	0.5%	1/1/2024
PA7977	Conemaugh TP, River Valley SD (NR) LST	\$52	1/1/2024
PA7978	Saltsburg BO, River Valley SD Regular IT	1.25%	1/1/2024
PA7979	Saltsburg BO, River Valley SD (NR) Regular IT	1.0%	1/1/2024
PA7980	Saltsburg BO, River Valley SD (NR) LST	\$10	1/1/2024
PA7981	Young TP, River Valley SD Regular IT	1.25%	1/1/2024

Code	Description	Rate	Effective Date
PA7982	Young TP, River Valley SD (NR) Regular IT	0.5%	1/1/2024
PA7983	Young TP, River Valley SD (NR) LST	\$52	1/1/2024
PA7984	Loyalhanna TP, River Valley SD Regular IT	1.25%	1/1/2024
PA7985	Loyalhanna TP, River Valley SD (NR) Regular IT	0%	1/1/2024
PA7986	Loyalhanna TP, River Valley SD (NR) LST	\$52	1/1/2024
PA7987	Lancaster CT, Conestoga Vly SD Regular IT	1.1%	1/1/2024
PA7988	Lancaster CT, Conestoga Vly SD (NR) Regular IT	1%	1/1/2024
PA7989	Lancaster CT, Conestoga Vly SD (NR) LST	\$52	1/1/2024
PA7990	Lancaster CT, Lampeter-Strbg SD Regular IT	1.10%	1/1/2024
PA7991	Lancaster CT, Lampeter-Strbg SD (NR) Regular IT	1%	1/1/2024
PA7992	Lancaster CT, Lampeter-Strbg SD (NR) LST	\$52	1/1/2024

Rhode Island

Rhode Island withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

South Carolina

South Carolina withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Utah

Utah

The Unemployment Insurance wage base limit changes to \$47,000 for 2024.

Vermont

The Unemployment Insurance wage base limit changes to \$14,300 for 2024.

Washington

- The Unemployment Insurance wage base limit changes to \$68,500 for 2024.
- There are changes for Washington Paid Family and Medical Leave for 2024.

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article [225924650095277](#).

West Virginia

- The Unemployment Insurance wage base limit changes to \$9,521 for 2024.

Wyoming

- The Unemployment Insurance wage base limit changes to \$30,900 for 2024.

Product updates

Payroll product updates

This update does not include any new features or improvements to payroll.

My Workforce Forms updates

This update does not include any new features or improvements to My Workforce Forms.

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage 300. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll > Government Reports > Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

<https://partner.aatrix.com/partners/sage300>

Supported W-2 Forms

For information about ordering W-2 forms, see the article [Which forms should I order for year-end?](#) on the Sage Support website.

Quarterly Wage on Disk(ette)

If you use Sage 300 U.S. Payroll, note that tax filing for Puerto Rico is not currently supported by Sage Payroll Tax Forms and eFiling by Aatrix. To produce State Unemployment Tax (SUTA) quarterly wage reports for Puerto Rico, use the Quarterly Wage on Disk(ette) feature.

For more information, see the following Knowledgebase articles at

<https://support.na.sage.com>:

- [Knowledgebase article 32877](#) - Producing Quarterly Wage Reports on Disk(ette) or Hard Disk
- [Knowledgebase article 32876](#) - State-Specific Information for Quarterly Wage on Disk(ette)
- [Knowledgebase article 32880](#) - Entering Employee Supplemental Information

Preparing for Year-End Processing

Before you start processing your 2024 payroll, visit the Sage City Year-End Center, where you can get fast answers from Sage support, peers, and product experts at the busiest time of year. You'll find helpful articles, discussion forums, and other links and resources to help your year-end processing go smoothly.

To get started, visit <http://sagecity.na.sage.com/p/yearend> and select Sage 300.

The Year-End Center provides you with information on the following topics:

- Printing and filing W-2 forms
- Entering employee supplemental information
- Frequently asked questions for year-end processes
- Information about processing year-end 2023 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2024

Product update installation instructions

Follow the instructions in this section to install, apply, and verify this Product Update.

Before you start:

- Back up your data.
- Make sure all users have exited the program.
- Verify your service pack or product update level. To verify what service pack or product update you have installed, click the **System Information** option on the **Help** menu in Sage 300.

Installing the product update

To install the product update:

1. Right-click the Product Update file to Run as Administrator (or make sure you have administrator rights to run the installation) and launch the installation program.
2. On the Welcome window, click **Next** to continue to the Software License Agreement window.
3. Select the features to install. Click **Next**, then **Install**.
4. On the Setup Complete window, click **Finish** to finish the installation.

Activating the tax update

To activate the tax update:

1. Start Sage 300.
2. In the **Administrative Services** folder, select **Data Activation**.
3. Select the current tax update, and then click **Activate**.
4. If you are prompted to convert a previous payroll tax update to the current version, click **Proceed**.

After you complete installation and activation, and after you have made any adjustments described in this document, you can resume processing payroll.

Verifying the product update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > System Information**. The tax update version will be listed with a product update number.

Updating the local tax repository and rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage 300.
2. On the Local and Other Custom Taxes window, click the **Install Repository** button to update all of the local tax rates in the system.
3. When asked if you want to continue updating company-level local tax records with information from the local repository, click one of the following:
 - **Yes** to automatically update the company rates for all local taxes.
 - **No** to update local taxes individually (select each tax and click the Update button to apply the rate changes). Doing this enables you to validate rates before and after the changes.
4. Depending on your choice in the previous step, update employee-level local tax records as follows:
 - If you clicked **Yes** in the previous step, when asked if you want to continue updating employee local tax records from the local tax repository, click one of the following:
 - **Yes** to automatically update the employee-level rates for all local taxes.
 - **No** to select each employee or use the Update Taxes tax, then update each tax or employee individually.
 - If you clicked **No** in the previous step, you must manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll > Update Taxes**, or by individual employee from **Employee Payroll > Taxes**.

Important! This process requires security permissions in Sage 300 to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.