



# **Sage 50–U.S. Edition**

Sage Payroll Services Getting Started  
Guide

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# Chapter 1: About Sage Payroll Services for Sage 50

Thank you for subscribing to Sage Payroll Services!

This guide describes how to set up Sage 50 for integration with your new payroll service. We offer three levels of payroll service for Sage 50: Sage Payroll Essentials (self-service with do-it-yourself tax filing), Sage Payroll Essentials Plus (self-service plus tax filing services), and Sage Payroll Full Service.

## How it works

To get started, you synchronize your general ledger accounts from Sage 50 with Sage Payroll Services using your Sage ID.

After your general ledger accounts are mapped to the corresponding accounts in Encore Online, the online payroll program, you can process payroll. When payroll is complete, synchronize the journal entries from payroll into your general ledger in Sage 50.

## How your information is stored

Sage is committed to the security and privacy of our customers' data. We use powerful encryption and authentication technology to ensure the highest level of security for your company information as it is stored and transmitted between your accounting program and your Sage web applications.

The following features ensure that your company information is safe and secure throughout the data transfer process:

- **Sage ID.** The WebSync Wizard in your Sage 50 program is securely configured to use a password-protected Sage ID that you create.
- **Secure HTTPS channel.** The WebSync Wizard transmits and verifies your Sage ID credentials through a secure HTTPS channel using the OAuth 2.0 protocol.
- **Microsoft Windows Data Protection API.** The WebSync Wizard encrypts your data using a key that ensures it can be decrypted only on the server where your Sage 50 program is installed.

## Before you start

### 1. Set up general ledger in your accounting program

Verify that you have set up your general ledger in Sage 50 Pro, Premium, or Quantum, 2015.3 and later and that you have enrolled in Sage Payroll Services.

If you don't have a currently supported version of Sage 50, call 877-495-9904 to purchase it. See the Sage 50 help for instructions to set up your general ledger in Sage 50 for payroll.

### 2. Enroll in Sage Payroll Services (if you haven't already done so)

Be sure that you have enrolled in the payroll service level that suits your company size and needs. If you haven't already enrolled, visit <http://na.sage.com/us/sage-payroll-services> to learn more, request a quote, and enroll in Sage Payroll Services. Or call 833-203-7226 to speak with a Sage Payroll Services sales representative.

### 3. Order your preprinted payroll checks from Sage Checks and Forms

If you haven't yet ordered your check stock, go to <https://www.sagechecks.com/> or call 800-617-3224 to order these specially formatted checks for use with Sage Payroll Services.

## Customer Support

If you have a question and can't find the answer here, or if you're experiencing an issue, contact Sage Customer Support. Depending on your Sage Business Care Plan, you can contact our Customer Support analysts by telephone or live chat, submit a support request online, and browse help and troubleshooting articles in the Sage Knowledgebase.

### Contacting Sage 50 Support

To speak to a customer support representative, call 866-747-3888. Our Support Center is open Monday through Friday, 9 a.m. ET to 8 p.m. ET.

Visit the Sage Knowledgebase at <https://support.na.sage.com> and review [article ID 35421](#) for additional support resources specific to Sage 50.

**Note:** The Sage 50 support team can help you prepare Sage 50 for integration with Sage Payroll Services.

## Contacting Sage Payroll Services Support

Because payroll support is customized to your needs and level of service, we send you your specific support contacts and resources when you enroll in the service.

Visit <https://www.sage.com/us/sage-payroll-services/support> for contact information for Customer Support for Sage Payroll Services.

# Chapter 2: Set up Sage 50 for payroll

After enrolling in Sage Payroll Services, you will receive a welcome email with an overview of the next steps to set up and use your new payroll service.

**Important!** If you have more than one company enrolled in Sage Payroll Services, you must follow these steps for each company. You must activate the service, manage users, and synchronize your data for each company individually.

## Step 1: Activate Sage Payroll Services

After you receive the welcome email and within 5 business days of your enrollment, we send you an email with a link to activate the payroll service integration using your Sage ID.

### Activating services with Sage ID

Sage ID is a unified sign-in system that gives you and your users access to your Sage web and mobile applications. If you do not have a Sage ID, you will be prompted to create one when you click the link to activate the service. If you already have a Sage ID, you will be prompted to connect your existing Sage ID to the payroll service you are activating.

### Manage users

After you activate the integration service with your Sage ID, we send you an email with a link to User Management. User Management is an online tool that lets you invite users who can access your company's Sage web and mobile applications.

Specifically for Sage Payroll Services, you can use User Management to determine who can use the WebSync Wizard to synchronize general ledger information and journal entries to and from Sage 50 and the Encore Online. You can give access to more than one user for the WebSync Wizard.

**Note:** See online help in Sage User Management for detailed instructions for inviting new users to your services.

## Step 2: Synchronize your chart of accounts

The WebSync Wizard connects Sage 50 with Sage Payroll Services to synchronize general ledger information between your accounting program and the online payroll service.

### Syncing your chart of accounts

Use the WebSync Wizard to synchronize your general ledger account information with Sage Payroll Services.

#### Before you start

- The synchronization process requires an Internet connection.
- The Sage ID you use here must be authorized to use Sage Payroll Services with your company. See the "Manage users" (page 4) section in this guide for more information.

#### To sync your chart of accounts

1. In Sage 50, open the company you have enrolled in Sage Payroll Services.
2. Select **Services > WebSync Wizard**.
3. On the **WebSync Wizard Sign In** window, enter your Sage ID email and password, and then click **Sign In**.
4. If you have multiple companies in Sage 50, the **Select a Company** window opens so that you can select the company you want to sync. Click **Next**.

**Note:** If you do not see your company listed here, you may need to activate the service, or your Sage ID may need to be granted access to the company in User Management. See "Activating services with Sage ID" (page 4) in this guide for more information.

5. On the **Select Services** window, select **Sage Payroll Services** and click **Next** to start the synchronization process. The wizard can take several minutes to transfer your data.
6. When the synchronization completes, select the check box next to **View Log File** for additional confirmation or for details if the synchronization fails.
7. Click **Finish** to close the wizard.

**Warning!** If the synchronization fails, your data is not transmitted. Contact Customer Support at 866-747-3888 for assistance. View the Log File that appears if the sync fails for details.



## Step 3: Set up Sage Payroll Services

After you synchronize your general ledger accounts from Sage 50 with your Sage Payroll Services account, and before you can process your first payroll, your payroll information must be set up in the Encore Online.

### Setting up Sage Payroll Services

Your company information, employees, tax information, and payroll details must be set up in Encore Online, the payroll service program. Depending on your level of service and your enrollment process, you may have set up your company using the payroll setup program (Guided Payroll Setup), or you may have worked with one of our payroll experts directly.

#### If you enrolled using the payroll setup program

We carefully review and validate your setup information to make sure everything necessary is entered in the system for your payroll. Then, we will email you the link to the online payroll program, Encore Online, and we provide you with detailed instructions to process payroll.

**Tip:** You use the same username (your email address) and password for both the payroll setup program and Encore Online, where you process payroll.

#### If you worked with Sage Payroll Services Support to enroll and set up

If you worked with our payroll specialists directly to enroll and set up your company, we will walk you through the remaining set-up process in Encore Online.

Your payroll specialist will provide you with the link to the program, and your username and a temporary password to log in to Encore Online. If you enrolled in Sage Payroll Full Service, we help you process your first payroll or we process payroll for you, according to your preferences.

### Mapping general ledger accounts

The general ledger accounts synchronized from your Sage 50 program must be mapped to the earnings, deductions, taxes, and bank accounts for payroll in Encore Online. Follow the instructions in [Help](#) in Encore Online to map the accounts yourself, or work with our payroll experts (for a fee) to map the accounts.

This one-time setup ensures that the general ledger journal entries from payroll are correctly generated before you download them into Sage 50.

## Timing to map general ledger accounts

You can process payroll in Encore Online before you map the general ledger accounts. However, you must have the general ledger integration feature activated before you start processing payroll. This is necessary for the system to create journal entries so you can download them to your Sage 50 general ledger when you're ready.

## To confirm general ledger integration is set up

1. Log in to Encore Online.
2. Select **PAYROLL > GENERAL LEDGER > Mapping** (tab).

**Note:** If **Basic Setup** is selected, Mapping is the only page you will see.

3. Confirm that **Payroll System GL Codes** are listed. These represent payroll items, such as earnings, deductions, taxes, and bank accounts. They are listed here only if the general ledger integration is set up.

The screenshot shows the 'Mapping' page in Encore Online. It has tabs for 'Account Setup', 'Mapping', 'Export Setup', and 'GL Download'. The 'Mapping' tab is active. Under 'Allocation', 'Use Account Name/Code' is selected. Below this is the 'Payroll GL Account Mapping' section with 'Group By' options (Dept., Division, Mapped, UnMapped, Debit, Credit) and 'Copy Mapping to Multiple Items' dropdowns. A table lists 'Payroll System GL Code' and 'Chart Of Account Allocation' with a red message 'Not all items are currently mapped'. Below is the 'Bank Account Mapping' section with a table for 'Bank Name', 'Bank A/C Number', and 'Chart Of Account - Bank A/C Name'. Buttons for 'Print Mapping', 'Reset Mapping', 'Apply Default Settings', 'Apply', 'Show Deactivated Items', 'SAVE', and 'CANCEL' are visible.

Select	Payroll System GL Code	Debit/Credit	Chart Of Account Allocation
<input type="checkbox"/>	401K	Credit	*Select*
<input type="checkbox"/>	401KCO	Credit	*Select*
<input type="checkbox"/>	BILLING1	Credit	*Select*
<input type="checkbox"/>	FICA	Credit	*Select*
<input type="checkbox"/>	FFER	Credit	*Select*

  

Bank Name	Bank A/C Number	Chart Of Account - Bank A/C Name
Taxes	456745422	*Select*
Service Charge	68413131	*Select*
Net Pay	433154611	*Select*
Deductions	12135644	*Select*

## Next steps:

- See online Help to learn how to [map your general ledger accounts](#), or
- "Process payroll" (page 9)

**Warning!** If you see the message *This feature is not currently activated based on your General Ledger set up*, contact Customer Support (<https://www.sage.com/us/sage-payroll-services/support>) immediately to have the integration set up. If you process payroll before the general ledger integration is

set up, journal entries will not be created and you will have to manually enter them in Sage 50.

# Chapter 3: Process payroll

Payroll processing is easy with Sage Payroll Services! We provide you with a unique link to your online payroll company, resources customized to your needs and level of service, and a few ways to submit your payroll:

- **Sage Payroll Essentials.** If you enrolled in this self-service payroll option, you can enter your payroll information directly in Encore Online, and you prepare and file your own payroll taxes. We offer you support from payroll experts through live chat, email, or you can request a callback.
- **Sage Payroll Essentials Plus.** If you enrolled in this self-service payroll option, you can enter your payroll information directly in Encore Online. We offer you support from payroll experts through live chat, email, or you can request a callback.
- **Sage Payroll Full Service.** If you enrolled in this full-service payroll option, you can submit your payroll information by phone, fax, email, or enter it directly in Encore Online. With full-service payroll, we provide you with one-on-one service from payroll experts committed to simplifying payroll for your business.

## Processing payroll in Encore Online

Encore Online is a comprehensive online payroll processing program. You can use the program to add and edit employees (who receive W-2 forms) and contractors (who receive 1099 forms). Depending on your payroll services setup, you can also view and maintain your company and payroll setup.

You use Encore Online to process payroll for all of your employees and contractors.

Review [online Help](#) or the [Processing payroll guide](#) for step-by-step instructions.

## Update your general ledger after payroll

Each time after processing payroll, you must use the WebSync Wizard to download the journal entries from payroll into your Sage 50 general ledger.

**Note:** You must map your general ledger accounts from Sage 50 to payroll items in Encore Online before you can download the journal entries. See "Mapping general ledger accounts" (page 6) in this guide for more information.

## Syncing payroll journal entries

Follow these steps after payroll is processed to download the payroll journal entries.

## Before you start

- The synchronization process requires an Internet connection.
- Use the Managed Payroll - Pre-Sync GL Posting Report in Encore Online (PAYROLL > REPORTS) to review the journal entries that are ready to download to Sage 50.

## To sync payroll journal entries

1. In Sage 50, open the company that is enrolled in Sage Payroll Services.
2. Select **Services > WebSync Wizard**.
3. On the **WebSync Wizard Sign In** window, enter your Sage ID email and password, and then click **Sign In**.
4. If you have multiple companies in Sage 50, the **Select a Company** window opens so that you can select the company you want to sync. Click **Next**.
5. When the synchronization completes, click **Finish** to open the **Web Transaction Center** with a summary of the journal entries downloaded from payroll.
6. Select the check box next to the payroll date you want to view and click **View transaction detail**.
7. The **General Journal Entry** window opens with details of the journal entries from payroll.
8. Click **Close** to close the **General Journal Entry** window and Web Transaction Center.

**Warning!** If the synchronization fails, your data is not transmitted. Contact Customer Support at 866-747-3888 for assistance. View the Log File that appears if the sync fails for details of the sync failure.

## Syncing payroll service fees

The journal entry for your payroll service fees is available immediately after processing payroll. The fees journal entry is downloaded to the Web Transaction Center with the payroll journal entries when you use the WebSync Wizard after payroll.

**Tip:** You specify the **Fee Expense Account** for the fees journal entry when your G/L accounts are mapped in Encore Online. See online Help to learn more about [mapping general ledger accounts](#).