Sage Payroll Link 7.1C

Product Update 2 Release Notes

May 2017

Contents

Introduction

Release Information

Product: Sage Payroll Link

Version: 7.1C Product Update 2

About This Update

This document describes enhancements and modifications in Sage Payroll Link, the application designed to integrate Sage 300 Payroll and Sage HRMS.

> **Note:** If you are using Sage Payroll Link for the first time, review the Sage 300 Payroll Sage HRMS Integration Guide for detailed instructions to install, set up, and configure the program for the first time.

We recommend you consult your certified business partner or Sage Professional Services Group to install the program for you.

You need all of the following to install this update:

- The Sage Payroll Link 7.1C Product Update 2 Installation Package, appropriate to your configuration. The installation package is available on the Sage Knowledgebase at https://support.na.sage.com.

- Sage 300 Payroll and Sage HRMS must be installed and set up.

> **Tip:** Refer to the Sage 300 Documentation and Sage HRMS Documentation websites for instructions to set up and use each program.

Before You Update

- You must log on as a user with administrative privileges to install the update.

- Complete all payroll processing and print all payroll checks.

- Review the compatibility guidelines in this document to ensure you use the correct installation package applicable to your version of Sage 300 and Sage HRMS.

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 and linked from within the help menu.

- **Sage City:** Visit http://sagecity.na.sage.com/ for blogs, tips, and guidance for your Sage programs.

- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at https://support.na.sage.com or contact Customer Support at 800-829-0170 from the U.S. and 800-330-2607 from Canada. Please have your Customer ID ready when contacting Support.

Product Updates

The following new features and improvements are included with this product update.

Canadian Payroll Residential Province

With this update, we made a small change to how the Province of Employment information transfers from Sage HRMS to Sage 300 Canadian Payroll using Sage Payroll Link. To ensure the employee's province(s) of employment and residence correctly transfers to Sage 300 Payroll, refer to the steps below.

For employees who live and work in the same province:

1. In Sage HRMS > Employees > View/Edit Employee > Demographics > **Address and Phone** subtab, enter the employee's address and select the province (of residence).

2. Open Sage 300 and use **Sage HRMS Process** to update payroll.

> **Important!** If you use the **EE Reporting** feature (View/Edit Employee > Demographics > Personal subtab), you must select the **Employment Province** (same as residence) on the EE Groupings subtab for the information to update Payroll.

For employees who live and work in different provinces:

1. In Sage HRMS > Employees > View/Edit Employee > Demographics > **Address and Phone** subtab, enter the employee's address and select the province (of residence).

2. On the **Personal** page (View/Edit Employee > Demographics > Personal subtab), select the **EE Reporting** checkbox. The EE Groupings subtab appears.

3. On the **EE Groupings** page (View/Edit Employee > Demographics > EE Groupings subtab), select the **Employment Province**.

4. Open Sage 300 and use **Sage HRMS Process** to update payroll.

Refer to the Sage Payroll Link 7.1C Product Update 1 Release Notes (February 14, 2017) for more information about how we recently updated the program for Canadian Payroll.

Compatibility with Sage Programs

The information below is intended to guide you regarding the compatibility of Sage HRMS and Sage 300 product versions with Sage Payroll Link. You should assume that any product versions not listed here are not compatible with the currently-supported versions of the programs.

Compatible Versions

Note the following compatibility guidelines and supported versions:

Sage 300 Payroll	Sage HRMS	Sage Payroll Link Installation Package	Sage Payroll Link Version
2018	2016 or 2017	Sage Payroll Link for Sage 300 2017	7.1C
2017	2016 or 2017	Sage Payroll Link for Sage 300 2017	7.1C
2016	2016	Sage Payroll Link for Sage 300 2016	7.1C
Prior versions	Prior versions	Sage Payroll Link	6.1C

Verifying Sage Payroll Link

Before you install Sage Payroll Link product update 1, you must select the correct installation package to download. The installation packages are provided on the Sage Knowledgebase as follows:

- **Sage Payroll Link for Sage 300 2017 Product Update 2**. The application file name is *SagePayrollLink2017PU2.exe*
- **Sage Payroll Link for Sage 300 2016 Product Update 2**. The application file name is *SagePayrollLink2016PU2.exe*

During the installation process, verify the correct installation package name displays in the InstallShield Wizard. After installation, you can confirm the version that was installed in your Control Panel > Programs and Features.

Installing Sage Payroll Link Product Update

Follow these instructions to download and install the product update.

Before you start

- Verify that Sage HRMS and Sage 300 Payroll have been installed, set up, and are working correctly.
- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access system data.
- Make sure that all users have exited and logged off from Sage HRMS and Sage 300.
- Make sure you have downloaded the correct installation package applicable to your configuration. See "Compatibility with Sage Programs" (page 4) for more information.

> **Important!** If you are installing this version (7.1C) of Sage Payroll Link for the first time or after using an older version of Sage Payroll Link, review the Integration Guide carefully and follow the installation steps in the guide instead.

Downloading the update

1. Visit the Sage Knowledgebase at https://support.na.sage.com, click **Log on**, and then log on to the site.
2. In the **Search the knowledgebase** box on the introduction page, enter one of the following article IDs and click the Search button:
   - 81746: **Download Sage Payroll Link 7.1C PU2 for Sage 300 2017**
   - 81747: **Download Sage Payroll Link 7.1C PU2 for Sage 300 2016**
3. In the download article, click **Download Now** to launch the Sage Download Manager, or click the direct download link to download the executable file.

Installing the product update

If you have Sage Payroll Link 7.1C installed, follow these steps to install the product update.

1. Using your external backup procedures, back up the Sage HRMS and Sage 300 databases to a media device that is external to your Sage servers.

2. On the server where Sage 300 is installed, run the **.EXE** file provided with Administrative privileges. Depending on your configuration, you may have to right-click the file and select **Run as Administrator**.

3. Follow the prompts on the InstallShield Wizard.

4. On the **Ready to Install the Program** window, click **Install** to proceed with the installation.

5. The system displays Installation windows indicating the progress of the installation. When the **InstallShield Wizard Completed** window appears, click **Finish**.

> **Important!** If you configure Sage 300 using a Windows peer-to-peer network, you must install this update on the server, and repeat the steps to install the program on each workstation that will access Sage 300 and Sage Payroll Link.

Activating Sage Payroll Link

If you install this product update after you installed and configured Sage Payroll Link 7.1C (August 2016), you do not have to activate it and your configuration settings remain unchanged.