Sage Payroll Link 7.1C

Product Update 6
Release Notes
Introduction

Release information

**Product:** Sage Payroll Link

**Latest update:** 7.1C Product Update 6

About this release

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 the 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 6 Installation Package that is appropriate for your configuration. See "Compatibility with Sage programs" (page 3) for more information. The installation package is available as an electronic download from the [Sage Knowledgebase](#).

- Both Sage 300 Payroll and Sage HRMS must be already 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 "Compatibility with Sage programs" (page 3) 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!

- **Online help**: Click the Help button within the product to access specific information about the current window as well as procedures for using the product.

- **Documentation**: Access this and other documents from the Sage HRMS Product Documents website.

- **Sage University**: Learn how to best utilize the full power of your software through videos and classes at Sage University at www.SageU.com.

- **Sage City**: Join industry peers, certified partners, and Sage pros online 24/7 in Sage City—the best place to ask questions and share product experiences, tips, and tricks.

- **Sage Knowledgebase**: Search the Sage Knowledgebase (www.sageKB.com), which provides 24/7 access to support articles as well as the latest software downloads and updates.

- **Customer Support**: For additional resources, visit www.sagecity.com/resources. If you need to talk thorough an issue with an expert, call Customer Support at 800-829-0170 from the U.S. and 800-330-2607 from Canada during business hours.

**Tip**: Have your Customer ID handy when contacting Customer Support.
Compatibility with Sage programs

The following table shows the various versions of Sage 300 that are compatible with Sage HRMS. For each version, it also shows the application file name in the installation package for Sage Payroll Link version 7.1C. as well as the Knowledgebase article that contains the installation package.

<table>
<thead>
<tr>
<th>Sage 300 Payroll</th>
<th>Sage Payroll Link application file name</th>
<th>KB article</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>SagePayrollLink2020PU6.exe</td>
<td>102417</td>
</tr>
<tr>
<td>2019</td>
<td>SagePayrollLink2019PU6.exe</td>
<td>102416</td>
</tr>
<tr>
<td>2018</td>
<td>SagePayrollLink2019PU6.exe</td>
<td>102415</td>
</tr>
<tr>
<td>2017</td>
<td>SagePayrollLink2019PU6.exe</td>
<td>102414</td>
</tr>
</tbody>
</table>

Note: Any product versions not listed are not compatible with the currently-supported versions of the programs.

Verifying Sage Payroll Link

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 by selecting Control Panel > Programs and Features.

Warning: If you upgrade your Sage 300 version, you must uninstall the existing Sage Payroll Link and then install the appropriate version of Sage Payroll Link.
Installing the Sage Payroll Link update

Follow these instructions to download and install the latest update.

Before you start

- Verify that Sage HRMS and Sage 300 Payroll are installed, set up, and 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 of both Sage HRMS and Sage 300.
- Make sure you downloaded the correct installation package applicable to your configuration. See "Compatibility with Sage programs" (page 3) for 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 Sage 300 Payroll Sage HRMS Integration Guide carefully and follow the installation steps in that guide instead.

Downloading the update

1. Visit the Sage Knowledgebase at www.sageKB.com, click **Log on**, and then log on to the site.
2. In the **Search the knowledgebase** box, enter one of the following article IDs, and click 🌐 (the Search button):
   - **102417**: Download Sage Payroll Link 7.1C PU6 for Sage 300 2020
   - **102416**: Download Sage Payroll Link 7.1C PU6 for Sage 300 2019
   - **102415**: Download Sage Payroll Link 7.1C PU6 for Sage 300 2018
   - **102414**: Download Sage Payroll Link 7.1C PU6 for Sage 300 2017
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 already installed, follow these steps to install the product update you downloaded.

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 update’s .EXE file 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. In 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 configured 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, you do not have to activate it; your configuration settings remain unchanged.
Enhancements and resolved issues in product updates

The following sections describe the important new features and improvements included in each product update. The latest product update includes all of the improvements in the previous product updates.

Product Update 6

Time off transactions

Time off transactions now transfer correctly even when employee IDs are set to numeric in Sage HRMS (HR Setup > HR Options).

Product Update 5

TLS 1.2

The TLS 1.2 protocol is now supported.

Product Update 4

Inactive employees

Inactive employees, even those without a termination date, are now correctly transferred.

Transfer Time Taken button

The Transfer Time Taken button now appears when using Sage Payroll Link with Sage 300 2018.
Product Update 3

Workers compensation
The Workers Compensation Code values are now being transferred.

Large datasets
Sage Payroll Link transfers data successfully even for large datasets with many distribution codes.

Product Update 2

Canadian Payroll residential province
The Province of Employment information transfers from Sage HRMS to Sage 300 Canadian Payroll using Sage Payroll Link even when Employment Equity is selected in HRMS.

To ensure the employee's provinces of employment and residence correctly transfer to Sage 300 Payroll, follow the relevant steps.

For employees who live and work in the same province:
1. In Sage HRMS, select Employees > View/Edit Employee > Demographics, click the 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, select Employees > View/Edit Employee > Demographics, click the Address and Phone subtab, enter the employee's address and select the province (of residence).
2. Click the Personal subtab, select the EE Reporting checkbox so the EE Groupings subtab appears.
3. Click the EE Groupings subtab, and then select the Employment Province.
4. Open Sage 300 and use Sage HRMS Process to update payroll.
Product Update 1

Workstation setup

Sage Payroll Link is now supported for Sage 300 workstation setup using a Windows peer-to-peer network; when workstations access Sage 300 on a server, you can now successfully use Sage Payroll Link on the server and all workstations. If you use Sage 300 with this configuration, you must install the update on the server and then repeat the installation steps on each workstation that will access Sage 300 programs from the server.

**Note:** If it is not already turned on, you must turn on the Windows feature for .NET Framework 3.5 on each workstation in order to use Sage Payroll Link on the workstation.

Canadian Payroll Province of Employment

When you set the **Employment Province** for an employee in Sage HRMS (Employees > View/Edit Employee > Personal tab > Demographics > EE Groupings subtab) and use the Sage HRMS **Process** feature (in Sage Payroll Link), the **Province of Employment** is now updated in Sage 300 Canadian Payroll (Payroll Employee > Employees > Class/Schd tab).