Sage Payroll Link 7.1C

Product Update 10
Release Notes

Contents

Introduction

Release information

Product: Sage Payroll Link

Latest update: 7.1C Product Update 10

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 10 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 or press **F1** within in the product to open the online help for the window you are viewing. From within the help, you can click the **Contents** tab (on the left side of the window) to explore a variety of topics, click the **Index** tab to look for topics related to a particular keyword, or use the search box (in the upper right corner of the window) by typing a particular word or phrase and clicking to search for topics containing that text.

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

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

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

- **Customer Support:** For other support resources, visit the Sage City Customer Resources page, select your country, and then select your product.

- **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.

- **Tax forms:** Because all printed forms have variations, Sage HRMS 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.

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.

Sage 300 Payroll	Sage Payroll Link application file name	KB article
All supported versions of Sage 300 Payroll	SagePayrollLink2020PU10.exe	117883

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 are using a version of Sage Payroll Link other than 2020, 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.

- Check which installation package is 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 in**, and then log in to the site.

2. In the **Search for answers** box, enter the following article ID, and press enter:

   117883: Download Sage Payroll Link 2020 7.1C PU10

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 10

Required update for Q4 2022

Starting with the Sage 300 Payroll Q4 2022 product update, this is a required update.

Some customers were experiencing an issue where Attendance transactions were not being created in HRMS when pressing the **Transfer Time Taken** button from the **Sage HRMS Process** page. This issue has been fixed. Additionally, we added the capability to restore missing Attendance transactions. To do this, you would enter a Period Start and End Date range before pressing the **Transfer Time Taken** button. Any missing Attendance transactions for that Period Date range will be transferred to Sage HRMS.

Product Update 9

Required update for Q2 2022

Starting with the Sage 300 Payroll Q2 2022 product update, this is a required update.

If the Gender Identity field on the Sage HRMS Employee Demographics page is set to "Non-binary," the Gender field on the Employee Payroll page will be set to "Non-binary," otherwise Gender will transfer as before.

Product Update 8

Required update for Q1 2022

Starting with the Sage 300 Payroll Q1 2022 product update, this is a required update.

Province of Employment is now transferred for Canadian Employees.

For the Premium version of Sage HRMS, taxes that are marked as **Include for Employees by Default** will be automatically added to new employees.

Product Update 7

Required update for transferring employees

Starting with the Sage 300 Payroll Q4 2021 product update, this is a required update.
You must install this update in order to transfer employees.

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).