

Sage 100 Payroll

Managing Your Payroll Needs with Sage 100

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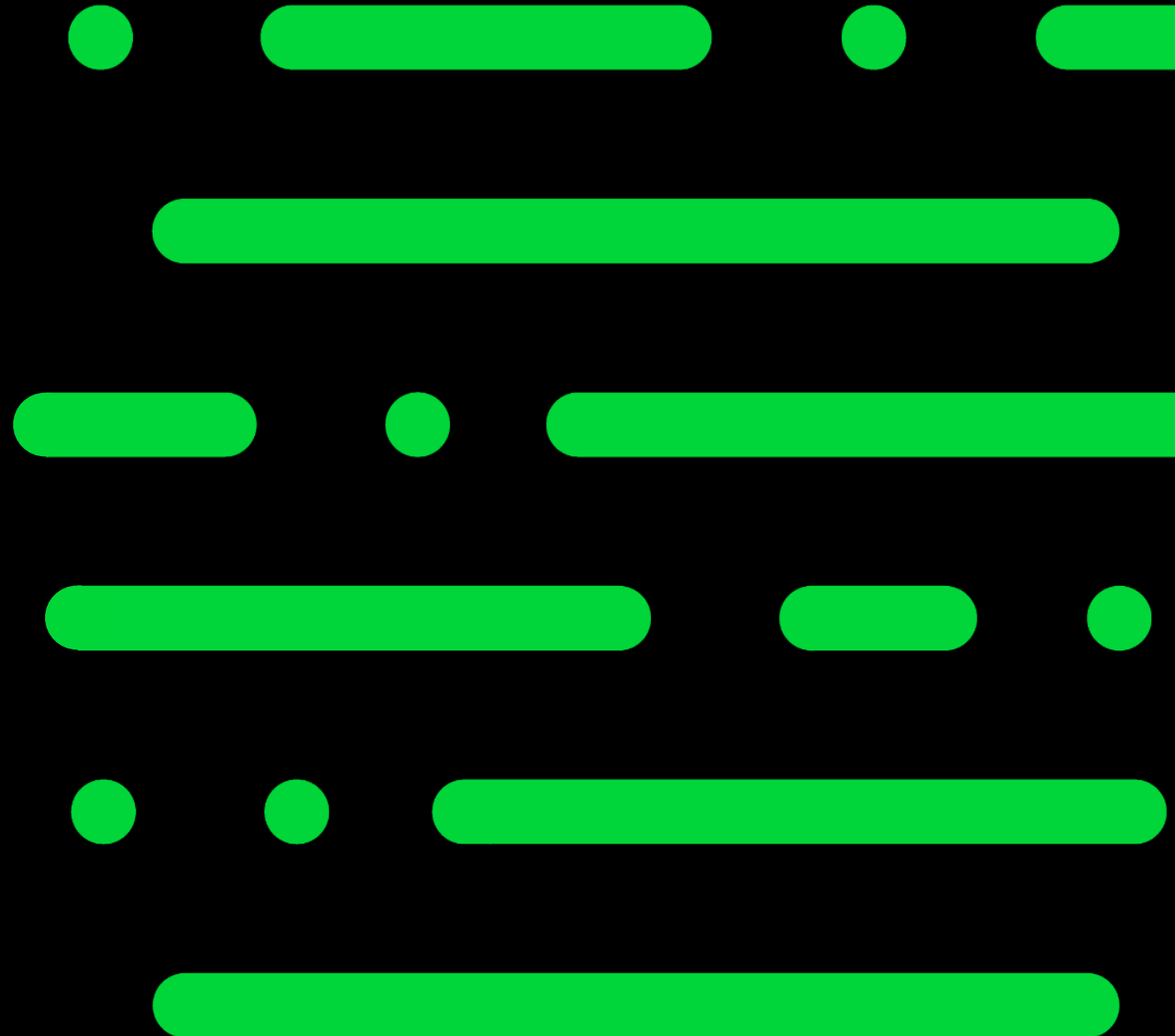
October 12, 2023

Sage



Topics Included

- **Welcome**
- **Sage 100 Payroll Benefits**
- **Sage 100 Payroll Features**
- **What's new in Payroll?**
- **Resources**
- **Questions**



Sage 100 Payroll Benefits

Automate federal, state,
and local tax table
updates and payroll
deduction calculations

Increase efficiency
through streamlined data
entry and tight integration
with Sage 100

Integrate with Job Cost,
TimeCard/Time Track,
Production Management,
and Operations
Management

Personalize experience
with modified screens,
user-defined fields, dual
grid entry, and custom
office scripts

Certified Payroll Reports

Track pension account
and benefit accrual

Keep Payroll up to date
with the latest updates
and enhancements
independently of Sage
100

Direct Deposits

W-2 form e-filing with
Federal and State eFiling
Reporting powered by
Aatrix

Payroll Features

Departments

- Assign employees to more than 1000 departments
- Departmental subtotals on reports
- Post earnings and employer tax expenses by department to separate general ledger accounts
- Department level security

The image shows two overlapping software windows from Sage. The top window is titled 'P/R Department Maintenance (EEC) 10/11/2023'. It has a 'Department Number' field with '00' and a 'Description' field with 'MAIN DEPARTMENT'. Below these are four tabs: '1. Main', '2. Earnings', '3. Deductions', and '4. Security'. The '1. Main' tab is active, showing a list of 'Payroll Expense Accounts' with their corresponding codes and descriptions. The bottom window is titled 'Department List' and displays a table of departments. It includes a search bar with 'Department' selected and 'Begins with' as the filter. The table shows 5 records, with '00 MAIN DEPARTMENT' highlighted. At the bottom of the 'Department List' window, it says 'Found 5 records'.

Department	Description
00	MAIN DEPARTMENT
01	Field Staff
02	Field Management
03	Office Staff
04	Management

Account Name	Code	Description
Standard Payroll	505-00-00	Labor - General
Employer Disability	235-00-00	State Disability
Employer Social Security	510-00-00	Payroll Taxes
Employer Medicare	510-00-00	Payroll Taxes
Employer Other	510-00-00	Payroll Taxes
Federal Unemployment Insurance	510-00-00	Payroll Taxes
State Unemployment Insurance	510-00-00	Payroll Taxes
Workers' Compensation	510-00-00	Payroll Taxes

Multiple Bank Accounts

- Process paychecks for up to 36 bank accounts per company
- Automatically post payroll transactions to Bank Reconciliation

Bank Code Maintenance (EEC) 10/11/2023

Bank Code: B K < > > | More...

Description: Payroll Checking - Security

Cash Account Number: 102-00-00 | Cash in Bank - Payroll

Bank Account Number: 55583784

Next Check Number: 0000056790

Country: USA | United States

Address: 101 Main Street

ZIP/Postal Code: 92648

City: Huntington Beach | State/Province: CA

Telephone: 555-555-5555 | Ext: | Work: | Fax: | E-mail Address: | URL Address: | Contact: | Comment: |

Accept Cancel Delete

Federal and State Taxes

- Facilitate filing payroll tax information with Federal and State e-Filing and Reporting features
- Electronic forms automatically populate information in appropriate fields to save time and reduce errors
- Print and mail forms to your employees
- Go Green with fee based e-filing service powered by Aatrix

The screenshot shows a software window titled "Federal and State Tax Reporting". It contains several sections for inputting tax information:


- Form Type:** A dropdown menu set to "Federal".
- State Code:** An empty dropdown menu.
- Form Name:** A text field containing "2022 941/SCHEDULE B/941-V REPORT" with a green checkmark icon to its right. Below it is a descriptive text box: "[Quarterly] Employer's Quarterly Federal Tax Return. Use this to report quarterly federal tax information."
- Reporting Period:** A section with "Quarterly" selected in a dropdown, "Year" set to "2020" in a text field, and "Quarter" set to "2" in a dropdown.
- W-2 Selections:** A section with "Kind of Employer" set to "N = None Apply" in a dropdown.
- Dates:** "Starting Check Date" is "4/1/2020" and "Ending Check Date" is "6/30/2020", both with calendar icons.
- Company Information:** Fields for "Name" (Edwardson Electric Company), "Country" (USA with a green checkmark and "United States" text), "Address" (two empty lines), "ZIP/Postal Code", "City", and "State/Province". To the right are fields for "Federal ID No.", "Telephone", "Fax", and "Trade Name".
- Selections Table:** A table with three columns: "Select Field", "Operand", and "Value".


Select Field	Operand	Value
Employee Number	All	
Sort Field	All	

At the bottom, there are three buttons: "Activate" (disabled), "Proceed" (green), and "Cancel" (green) with a help icon to the right.

Security for Personally Identifiable Information

- ☒ Allow Updating of Registers from Preview
- ☒ Allow Viewing, Printing and Editing of Highly Sensitive Personally Identifiable Information
- ☒ Allow Visual Integrator Exports

Social Security No.	226-85-4712
Birth Date	6/12/1977 

Social Security No.	***-**-4712
Birth Date	6/12/1977 

- Personally Identifiable Information (PII) is encrypted and extra security precautions are placed on information considered highly sensitive such as Social Security Number, Bank Account, and Bank Routing details
- Role Maintenance/Security Options to allow viewing, printing and editing of PII

More Payroll Features

Multiple Earnings Distributions

Distribute earnings to any combination of state, locality, department, job category or worker's compensation code

Earnings & Deduction Information Tracking

Track earnings and deduction information on a monthly, quarterly, and annual basis for each employee

Automatic Application Of Earnings & Deductions

Automatically apply earnings and deductions to salaried and hourly employees who work a standard number of hours

Multiple State & Local Tax Processing

Include earnings and appropriate taxes from multiple state and local tax jurisdictions on the same check

Manual Checks/ Check Reversal

Process manually written checks and reverse previously recorded checks. Up to 10 separate checks per employee per pay period

Efficiently Process Deductions

Automatically perform deductions utilizing Payroll Deduction Codes for 401(k) and Pension Plans for regular, sick, and vacation earnings.

Benefit Accrual

Automatically accrue and track vacation, sick time, and other designated benefits and print a Benefits Register for each pay period. Generate a Benefit Accrual Report for any employee.

941 and Quarterly Pay Recap Report

Generate quarterly summaries of payroll wages and taxes per pay period and by department

Management and Tax Reports

Create quarterly and annual reports providing information on earnings, deductions, vacations, sick time, employee & employer taxes

What's New in Payroll

Payroll 2.23

- **Default Years to Retain Payroll History** – In Payroll Options on the History Tab, the default number of years to retain payroll history is now nine years. The minimum number of years to retain history has not changed, and this update will not affect your existing settings.

Payroll 2.23.1

- Version 2.23.1 contains program fixes for Sage 100 Payroll

Payroll 2.23.2

- **Mask Social Security Number When Printing**– Employee Social Security will now print masked on selected reports. For the following reports, the Print Social Security Number field has been added, and you have the option to print the last 4 digits of the Social Security Number or to excluded the Social Security Number from printing:
 - Employee Listing
 - Check History Report
 - Quarterly Tax Report
 - Quarterly Unemployment Report
 - Pension Plan History Report
 - Pension Plan Audit Report

Only users with the appropriate security can view this sensitive information and access the option to print the full Social Security Number.

In addition, the employee Social Security Number will always print masked on the following reports:

- Employee Audit Report
- Employee Retention Credit Worksheet
- Qualified Emergency Leave Report

Payroll 2.23.2 (continued)

- **Mask Direct Deposit Information When Printing** – Employee direct deposit information, which includes bank account and routing numbers, will now print masked on selected reports. For the following reports, the Direct Deposit Information field has been added, and you have the option to print the last 4 digits of the bank account and routing numbers or to exclude them from printing:
 - Employee Listing
 - Payroll Data Entry Audit Report

Only users with appropriate security can view this sensitive information and access the option to print the full bank account and routing numbers.

In addition, the company routing number and the employee bank account and routing numbers will always print masked on the following reports:

- Direct Deposit Register
 - Check Register
- **View Tax Table Rates in Tax Profile Maintenance** - The Tax Table Rate Inquiry button has been added in the Tax Rates and Limits window access from Tax Profile Maintenance. When the tax selected is a table rate, you can click the Tax Table Rate Inquiry button to view detailed tax table rate information.

Payroll Compatibility

- Effective with the December 2023 release of Sage 100 Payroll 2.24, payroll customers and those utilizing 1099 functionality must upgrade to install Payroll 2.24 and up – if they are running Sage 100 versions 2018 and 2019.
- One of the following versions of Sage 100 will be required:
 - 2023.x
 - 2022.x
 - 2021.x
 - 2020.x
- A failure of the Payroll update installation and the inability to generate 1099's, W-2's or associated tax reporting documents will be experienced if no action is taken.

Resources

1. [Sage Publications](#) - A leading publisher of academic books and journals, offering a wide range of resources for researchers and students.

2. [JSTOR](#) - A digital library of books and journals, providing access to a vast collection of academic texts.

3. [ERIC](#) - The Educational Resources Information Center, a full-text database of education-related materials.

4. [Google Scholar](#) - A search engine for scholarly literature, including articles, books, and theses.

5. [ResearchGate](#) - A platform for researchers to share and discover research papers and articles.

6. [Scopus](#) - A large abstract and citation database of peer-reviewed literature.

7. [Crossref](#) - A service that links digital objects and their metadata, facilitating the discovery and linking of research.

8. [Open Access Journals](#) - A collection of journals that provide free access to their content, often in the fields of science, technology, and medicine.

9. [PubMed](#) - A free database of biomedical literature, primarily consisting of articles from the United States National Institutes of Health.

10. [Sage Research Methods](#) - A collection of books and articles that provide guidance on various research methods and techniques.

Sage 100 Information Center

100

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Sage 100 Information Center

Connect with Sage for tools and information that will help you get the most out of Sage 100.



Sage 100 2023.1 and 2022.4 are now available

Explore how you can further streamline workflows and improve accuracy.

[See What's New](#)



Product Update

Using older software?
You may be missing out.

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Sage City

Join product groups to ask questions, share tips, and
collaborate with other community members.

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Learning Resources

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learning from Sage University.

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Customer Portal

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activation codes, and payment information.

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Grad Caps/Sage University

Employee Maintenance (EEC) 10/11/2023

Employee No.01-0001000

Warning - Data Entry in Progress!

More...

Last NameEmerson

First NameDavid

Middle Name

1. Main

2. Additional

3. Benefits

4. Taxes

5. Pay Defaults

Mailing Address

Country

Address4662 W. Lakeview Dr.

ZIP/Postal Code92668

CityTustin

State/ProvinceCA

Telephone 1(714) 556-3217

Ext

Home

Primary

Telephone 2

Ext

Home

Primary

E-mail Address

Job Title

Full / Part TimeFull

Seasonal Employee

Statutory Employee

Employee StatusActive

Status Change

Hire

Review

Inactive

Termination

Rehire

Date1/12/202

Accept

Cancel

Delete

Sage University

Home

Sage product training

About Sage U

Help

Contact us

Browse for Training

Browse for Training 3 Results

AllSage 100 - PR Employee maintenance

By Title

Training clear

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My Subjects

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Newest

Solution/Topic clear

Accounting and ERP Products

SBC Accounting - NA

SBC Accounting Canada

SBC Accounting U.S.

SBC Accounting UK

Sage 100

Sage 100 - Accounts Payable

Sage 100 - Accounts Receivable

100E - Sage 100 - Payroll Specialist: Complete Learning Package

Learning Package - eLearning/Anytime Learning

This Anytime Learning Package is designed for customers who want to know how to both set up and process payroll. This course applies to Payroll 2.x. Course curriculum: Two eBooks are included in this learning package. Make sure to launch the books so that you can follow along with the training... read more

100E - Sage 100 - Payroll Specialist: Entering Employee Information

Learning Package - eLearning/Anytime Learning

This anytime learning package includes information about setting up and maintaining employee payroll information, including benefits, taxes, pay defaults, direct deposits, and ACA information. This course applies to Payroll 2.x. Duration: This package consists of 5 videos that will take... read more

100ET2 - Sage 100 - How to create and maintain employees

OnDemand - eLearning/Anytime Learning

In this Anytime Learning topic you will learn how to create and maintain employees, including benefit, tax, and default pay information. This course is provided at no charge for those with a Gold or Platinum Business Care plan. Please log in to your Sage University profile to get full access... read more



Sage City / Sage 100 Year-end Center



City ☰

Product Support

Community Help

🔍 Search



United States > Sage 100

Sage 100 Year-end Center



Ask a question



FAQs

- Installation
- Payroll
- Product and Tax updates
- Reports and Tax Forms
- Acts & Legislation



Learning

- Videos
- Sage University classes



Checklists

- Year-end Checklists
- Payroll & AP Year-end Checklist
- Payroll Workflow



Updates

- Announcements, News, and Alerts
- Software Updates
- Documentation

Bookmark this group



PEGG

Chat with our digital year-end assistant

Still need assistance?
Access all help options
at:
Sage.com/Resources

External Resources

- Aatrix:State W2 & 1099 eFile Deadlines
- Internal Revenue Service
- Important Dates: IRS



Sage 100 Knowledgebase

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Sage 100

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Featured Solutions

- ▶ Deferred printer is the only option available when accessing a Printing task
- ▶ How to install Workstation Setup for Sage 100



How to

- ▶ How to request Administrator user password reset assistance for Sage 100
- ▶ How do I migrate my Sage 100 Contractor SQL program, licenses, and data from one server to another?
- ▶ Does Sage have plans to stop supporting TLS 1.0 & 1.1 for Sage 100?
- ▶ Scope of Support
- ▶ How to set up Security in Sage 100 Contractor

[See more](#)



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- ▶ Contact us



Common Problems

Questions