Sage 100 Payroll

Managing Your Payroll Needs with Sage 100
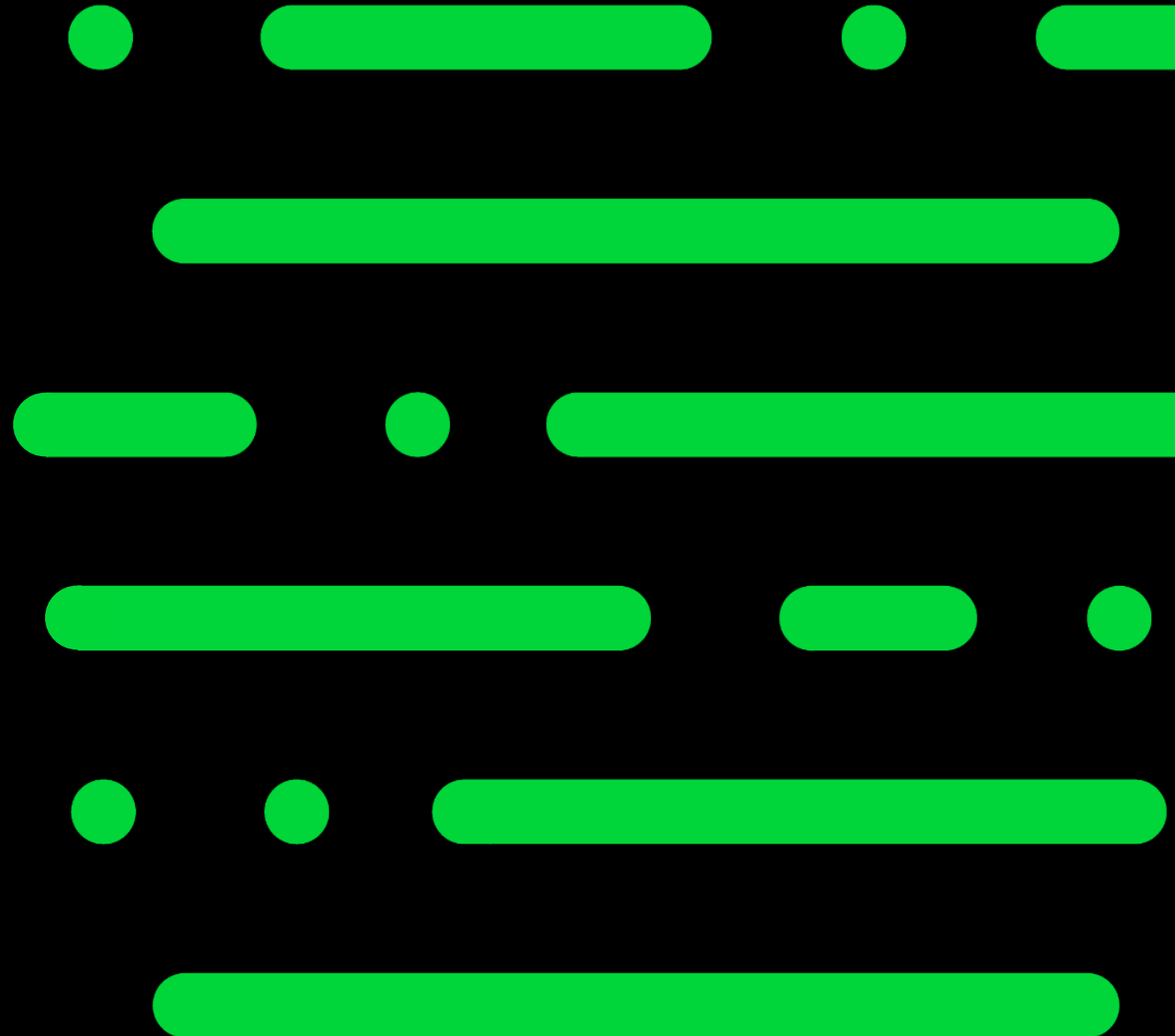
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Sage

Topics Included

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

Sage

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

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Payroll
Features

Sage

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

Multiple Bank Accounts

- Process paychecks for up to 36 bank accounts per company

- Automatically post payroll transactions to Bank Reconcilation

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

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 |

- 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

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- 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

Sage 100 Information Center

Sage City   Sage Knowledgebase   Sage University   Customer Portal   Integrated Products   Sage 100 Marketplace   Share your ideas

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.

Learn More

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

Visit Sage City

Learning Resources
Master the full power of your software with flexible learning from Sage University.

Visit Sage University

Customer Portal
Get answers to all your account questions; including activation codes, and payment information.

Visit your Customer Portal

Grad Caps/Sage University

Sage City / Sage 100 Year-end Center

https://www.sagecity.com/us/sage100/sage100-yearend/

Sage | 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

Checklists

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

Bookmark this group

PEGG
Chat with our digital year-end assistant

Learning

- Videos
- Sage University classes

Updates

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

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

Feedback

External Resources

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

Sage 100 Knowledgebase

Questions

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