



Sage 300 ERP Payroll Sage HRMS Link Integration Guide

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Table of Contents

Overview	4
Sage HRMS for Sage 300 ERP Payroll	4
Set Up Sage HRMS with Sage 300 ERP	4
Steps to Process an Integrated Payroll	5
Setting Up Sage HRMS Link	6
Setting up Sage HRMS Link.....	6
Using Database Configuration to Specify the Sage HRMS Database.....	7
Using Employer Configuration to Link Organizations.....	7
Using Employee Configuration to Map Employee Record Fields	8
Demographics	8
Class.....	8
Cost Center	9
Earning Codes	10
Deduction/Benefit.....	11
Calculation Type Values.....	12
Advance	12
Expense Reimbursement	12
Accrual.....	12
Accrual.....	12
Shift Differential Schedule	13
Distribution Codes	14
Transferring Employee Information with Sage HRMS Link	14
Support and Resources	16

The Sage HRMS solution offers comprehensive payroll processing, training, and benefits administration to ensure your readiness to tackle challenging HR issues.

Sage HRMS for Sage 300 ERP Payroll

Sage HRMS for Sage 300 ERP Payroll includes:

Sage HRMS, a powerful solution for managing critical employee information. Ideal for businesses of any size, Sage HRMS helps you manage your company's benefits programs with comprehensive benefits administration tools, track and prepare reports to ensure government compliance, and electronically store employee forms and certificates.

Sage HRMS Time Off, for tracking employee absences and leave accruals. Its flexibility allows you to define absence codes, handle the Family and Medical Leave Act (FMLA), and manage accruals and carry-overs. Designed to meet all your attendance tracking needs, Sage HRMS Attendance offers complete flexibility in handling all types of attendance plans and employee time off.

Sage HRMS Train, a skills-based training management system used to define specific training needs, prepare compliance reports, and ensure certifications are completed on-time. In addition, it helps define training requirements for new employees based on their current skill sets and automatically updates employee "Skills Profiles" upon completion of new courses.

Sage Employee Self Service, the web-based employee self-service solution for Sage HRMS. The package includes the Employee Self Service functionality and Benefits Enrollment.

Sage HRMS Link, for transferring employee data and earnings, deductions, and benefits information from Sage HRMS to Sage 300 ERP Payroll.

Set Up Sage HRMS with Sage 300 ERP

You should install and set up Sage 300 ERP and Sage HRMS components in order noted below. These steps are listed in greater detail in the second section of this guide.

You must install Sage 300 ERP and Sage HRMS before you can install Sage HRMS Link.

Install, activate, and set up Sage 300 ERP modules

- Sage 300 ERP U.S. Payroll or Canadian Payroll must be installed.
- You must activate Payroll before you can activate the Sage HRMS Link.
- For full functionality, Optional Fields must be activated
- Add earnings, deductions, and benefit codes in payroll, following the guidelines in Chapter 2 of this guide.

Note: You add employees in Sage HRMS, and then transfer them to Sage 300 ERP Payroll after setting up the Sage HRMS Payroll Link.

If you already have employee records in Sage 300 ERP Payroll, you can use the Payroll Link module (a separate module for HRMS) to import employees into Sage HRMS.

Steps to Process an Integrated Payroll

Once you have set up Sage HRMS and Sage 300 ERP, follow these steps each time you process payroll:

1. Add or update employee records in Sage HRMS.
2. Use the Sage HRMS Link process in Sage 300 ERP to update Sage 300 ERP Payroll with new or changed employee records.
3. Add timecards, if necessary, in Sage 300 ERP.
4. Calculate the payroll in Sage 300 ERP Payroll.
5. Print the pre-check register in Sage 300 ERP.
6. Print and post payroll checks in Sage 300 ERP.
7. Use the Sage HRMS Link process to bring Absence Transactions from Sage 300 ERP payroll to Sage HRMS.

Setting Up Sage HRMS Link

This section provides the detailed steps for setting up the Sage HRMS Link for Sage 300 ERP.

Note: Setting up the Sage HRMS Link for Sage 300 ERP is only a small part of the overall setup process. You first have to set up Sage 300 ERP Payroll and Sage HRMS.

Before you start, you must install and set up:

- Sage 300 ERP Payroll—either U.S. Payroll and/or Canadian Payroll.
- Sage HRMS. Refer to the documentation on the [Sage HRMS product documentation website](#) for additional information.

Important! If you have just installed U.S. or Canadian Payroll, read the notes in this chapter on setting up benefits and accruals before setting them up in Sage 300 ERP.

Setting up Sage HRMS Link

After setting up Sage HRMS and Sage 300 ERP Payroll, follow these steps to install and set up the Sage HRMS Link.

Depending on your needs, this process can change, but the general procedure for setting up Sage HRMS Link is as follows:

1. Install and activate the Sage HRMS Link.
Once activated, the module will appear on the Sage 300 ERP Desktop as Sage HRMS Link.
2. Choose **Database Configuration** from the Sage HRMS Setup folder to specify the name of the Sage HRMS database
3. Choose **Employer Configuration** to link your Sage 300 ERP Payroll system to an organizational level in Sage HRMS.
4. Choose Employee Configuration to map fields in Sage 300 ERP Payroll employee records to fields in Sage HRMS.
5. Use the **Sage HRMS Process** form in the Sage HRMS Link to transfer employee information from Sage HRMS to Sage 300 ERP Payroll.
6. After completing setup, you can process payroll.

Note: If employee records exist in Sage 300 ERP Payroll before you add them to Sage HRMS, you must make sure that you use the same employee ID in Sage HRMS that you use in Sage 300 ERP Payroll. Otherwise, you may have two records for the same employee when you transfer the employee records.

Using Database Configuration to Specify the Sage HRMS Database

You must use Database Configuration to specify the Sage HRMS database before you can run Employer Configuration or Employee Configuration.

1. Choose **Database Configuration** from the Sage HRMS Setup folder.
2. Enter the SQL Server instance name or select it from the dropdown list beside **Sage Abra HRMS SQL Server Name**.
3. Enter the name of the Sage HRMS database. This will be the name assigned to the live HR data upon installation of Sage HRMS.
4. Enter the SQL Database User name and Password. The SQL password must not start or end with a space.
5. Click **Test Connection** to ensure that the Sage HRMS Link is connected to the Sage HRMS database. If Test Connection fails, the above steps must be verified for accuracy before the system will allow the data to be saved.

Using Employer Configuration to Link Organizations

You must complete Database Configuration before you can use the Employer Configuration and Employee Configuration forms.

1. Choose **Employer Configuration** from the Sage HRMS Setup folder.

You must complete Database Configuration before you can continue to Employer configuration and Employee Configuration.

Note: The payroll tab on the Employer Configuration screen depends on which payroll module (U.S. or Canadian) you have activated for the Sage 300 ERP database.

2. Select the **Use Interface** check box to activate a connection to the Sage 300 ERP Payroll module.

You can uncheck this box to temporarily disengage integration for maintenance or for other purposes.

3. In the **Link Payroll Company to <Canadian or U.S.> Payroll** field, select the organizational relationship between Payroll and HRMS.

You can choose any Organization Level set up in Sage HRMS Enterprise Setup, but, typically, you would choose "Employer" to associate a Sage HRMS employer with a company in Sage 300 ERP Payroll.

Note: If you choose Employer, the last field "Sage HRMS Org. to <Canadian or U.S.> Payroll" will not appear on the Employer Configuration form.


4. For **Sage HRMS Employer to <Canadian or U.S.> Payroll**, select the Sage HRMS employer or company that houses the employees you want to pay.
5. For **Sage HRMS Org. to <Canadian or U.S.> Payroll**, select the HRMS organization with the employees that you want to pay.

Using Employee Configuration to Map Employee Record Fields

You must complete Database Configuration and Employer configuration before you can use the Employee Configuration form.

The Employee Configuration setup form lets you map employee record fields in Sage 300 ERP Payroll to fields in Sage HRMS, according to payroll Profile IDs.

The Payroll Module description will be either Canadian Payroll or U.S. Payroll, depending on which payroll module is activated. If both Canadian and U.S. Payrolls are activated, you have to select the payroll module that you wish to integrate with each Profile ID.

1. Choose **Employee Configuration** from the Sage HRMS Setup folder.
2. Click on the **Go** button  or press F7 to display the Payroll fields on the Employee Configuration form.

The Sage 300 ERP Payroll fields that display may need to be mapped to appropriate Sage HRMS fields.

3. Double-click the cell for the **Sage HRMS Field** column to display the drop-down list of fields that can be selected for mapping.

The drop-down list displays fields from Sage HRMS or from any of the user-defined fields from non-multiple record Custom Detail windows in Sage HRMS. Custom Panels are created under System > Design Custom Details, in Sage HRMS.

4. Choose each tab, in turn, to map data from Sage HRMS to Sage 300 ERP Payroll.

Guidelines for configuring the various Employee Configuration pages are provided below.

Demographics

The Demographics Configuration page includes the following from the Sage 300 ERP Payroll Employee form:

- All fields from the Demographics window.
- Some fields from the Class window.
- All fields from the Other window.
- Some fields from the Pay window.

Mapping tables are provided in the Sage 300 ERP Help with information for mapping some of the Demographics Configuration fields. Certain rules are static and are not shown in the mapping tables. For example, Last Name in Sage 300 ERP Payroll transfers directly from Last Name in Sage HRMS.

Class

In Sage 300 ERP Payroll, you can set up classes and corresponding Class codes to be used for sorting and selecting data.

- Up to four Classes can be setup in Sage 300 ERP Payroll.
- Each Class can have an unlimited number of Class Codes.

- Class Codes can be assigned to each employee, and then used for sorting and selecting data.

For example, Class 1 may be setup as an office location with corresponding Class Codes of East Side Location, Central Office, and West Side Location. Then, data can be sorted to identify employees working in the Central Office by selecting the Central Office class code in the Class 1 field.

There are no standard settings in Sage HRMS similar to the Sage 300 ERP Payroll Class Codes. As such, Sage 300 ERP Payroll Class Codes must be mapped to user-defined code tables, and then each Class Code can be mapped to the corresponding code from the selected Sage HRMS code table.

Note: If Sage 300 ERP Payroll Class does not contain any class codes, the class will not be shown.

Cost Center

The Sage 300 ERP Payroll Cost Center tab allows you to specify General Ledger account segments for each employee. The segments specified will be used as the default account segments when payroll transactions are posted in General Ledger.

An example of a common account segment setup is shown below:

Account segments set up by department codes 100, 200, 300, and 400.

G/L accounts for 6720 Wages and benefits are set up as follows:

- 6720 – 100 Wages and benefits, dep 100
- 6720 – 200 Wages and benefits, dep 200
- 6720 – 300 Wages and benefits, dep 300
- 6720 – 400 Wages and benefits, dep 400

On the **Cost Center** tab of the **Employee Configuration** form, department codes can be assigned to each employee. An employee who works in department 100 will be assigned segment code "100" in the Department segment; an employee who works in department 200 will be assigned segment code "200" in the Department segment, and so on. As a result, when payroll transactions are posted in General Ledger, the 6720 expense account will be overridden with account 6720-100 for all employees who work in department 100; 6720-200 for all employees who work in the department 200, and so on.

Based on the Payroll Cost Center's setting:

- If, in the payroll module (U.S. or Canadian), **Use Cost Center Override** is not selected, the Cost Center page on the Employee Configuration form will be hidden.
- If, in the payroll module, **Use Cost Center Override** is selected, but **None** is selected for the **Use Cost Center Override in Accounts** field, the Cost Center page on the Employee Configuration form will be hidden
- In all other situations (when you select **Use Cost Center Override** and **Override Expense Accounts** or **Override Expense and Liability Accounts**), the Cost Center page will be displayed. Also, you will have a choice to map Payroll segments to Organization Codes from HRMS or to user-defined tables. After selecting an organization code or a user-defined table, you must map each individual segment to the value of the organization code table or user-defined table.

Earning Codes

Three earning code types can be mapped. These are listed below along with the mapping settings for each. Earning code types other than these cannot be mapped.

Salaried

- Category is "Earning"
- Type is "Salary & Wages"
- "Non-Periodic Payment" is un-checked
- Employee Calculation Method is set as one of the following:
 - Flat
 - Fixed
- Sage HRMS selections include:
 - Salaried
 - User-defined Employment Fields (Note: Only numeric data can be processed.)
 - User-defined Pay Fields (Note: Only numeric data can be processed.)

Hourly

- Category is "Earning"
- Type is "Salary & Wages"
- "Non-Periodic Payment" is un-checked
- Employee Calculation Method is set as one of the following:
 - Hourly Rate
 - Amount per Hour
- Sage HRMS selections include:
 - Hourly
 - User-defined Employment Fields (Note: only numeric data can be processed)
 - User-defined Pay Fields (Note: only numeric data can be processed)

Bonus Amount

- Category is "Earning"
- Type is "Salary & Wages"
- "Non-Periodic Payment" is un-checked
- Employee Calculation Method is set as one of the following:
 - Flat
 - Fixed
- Sage HRMS selections include:
 - Bonus
 - User-defined Employment Fields (Note: only numeric data can be processed)
 - User-defined Pay Fields (Note: only numeric data can be processed)

Notes:

The program adds a default value for the field **All Sage HRMS Codes Map To One Dist. Code** when you select a value (except None) for Sage HRMS and the value of fields **All Sage HRMS Codes Map To One Dist. Code** and **Distribution Code Maps To** are empty. The default value is the first distribution code in the drop down list related to the Payroll Earning code.

If None is selected for Sage HRMS, the value of the fields **Distribution Code Maps To** and **All Sage HRMS Codes Map To One Dist. Code** will default to None and N/A, respectively. Also, the fields **Conversion Factor**, **Dist Code Maps To**, and **All Sage HRMS Codes Map To One Dist. Code** cannot be edited until a value other than None is selected for Sage HRMS.

When the value of one of the distribution code fields (for example, the **Dist. Code Maps To** or **All Sage HRMS Codes Map To One Dist. Code** field) is changed, the value of the other distribution code field will automatically reset to the default value for the distribution code mapping record related to the Sage 300 ERP Payroll Earning code. If Sage 300 ERP Payroll Class does not contain any class codes, the class will not be shown.

Deduction/Benefit

All Payroll Deduction and Benefit codes can be mapped. You can select from the following three Sage HRMS mapping options to map the deduction and benefit codes:

- Benefit Type
- Benefit Code
- User Defined

Benefits are set up differently in Sage HRMS from the way they are set up in Sage 300 ERP Payroll.

- In Sage HRMS, employer and employee portions of a benefit premium are setup in one place (Insurance Benefits table).
- In Sage 300 ERP Payroll, the employer and employee portions of a benefit premium are set up twice: the employer portion as a Payroll Benefit, and the Employee portion as a Payroll Deduction; or, are set up once as a Payroll Deduction.

Therefore, the employer portion of the HRMS benefit can be mapped to Payroll earnings categorized as Benefits or Deductions; and, the employee portion of the HRMS benefit can be mapped to the Payroll deductions (in the Deductions category).

If the Sage 300 ERP Payroll earnings are set up in the Deductions category, the options for the field "Calculation Type" are:

- Do not Calculate
- Employee Only
- Employer Only
- Both Calculate

If the Sage 300 ERP Payroll earnings are set up in the Benefits category, the options for the field Calculation Type are:

- Do not Calculate
- Employer Only

Calculation Type Values

- For the field **Employer Portion Calculation Type**, if you selected **Other Calculated Amount Field**, you must prorate one pay period's amount based on the corresponding employee's benefit code pay frequency. Also, this field cannot be edited if you use a User-defined field to map the Payroll Deduction/Benefit Code, or if you use Benefit Type or Benefit Code for mapping, but only calculate employee portion.
- The program adds a default value for the field **All Sage HRMS Codes Map To One Dist. Code** when you select a value (except None) for Sage HRMS, select a value (except Do not Calculate) for **Calculation Type**, and the value of fields **All Sage HRMS Codes Map To One Dist. Code** and **Distribution Code Maps To** are empty. The default value is the first distribution code in the drop down list related to the Payroll Deduction/Benefit code.
- If None is selected for Sage HRMS or Do not Calculate is selected for **Calculation Type**, the value of the fields **Distribution Code Maps To** and **All Sage HRMS Codes Map To One Dist. Code** will default to None and N/A, respectively. Also, the fields **Conversion Factor**, **Dist Code Maps To**, and **All Sage HRMS Codes Map To One Dist. Code** cannot be edited until a value other than None is selected for Sage HRMS and a value other than Do Not Calculate is set for Calculation Type.
- When the value of one of the distribution code fields (for example, the **Dist. Code Maps To** or **All Sage HRMS Codes Map To One Dist. Code** field) is changed, the value of the other distribution code field will automatically reset to the default value for the distribution code mapping record related to the Sage 300 ERP Payroll Earning code.

Advance

You can map all Sage 300 ERP Payroll Advance codes to four User-defined Employment fields and four User-defined Pay fields of Sage HRMS. The mapping rules applicable to other fields and distribution codes are the same as those for Earning Codes.

Expense Reimbursement

You can map all Sage 300 ERP Payroll Expense Reimbursement codes to four User-defined Employment fields and four User-defined Pay fields of Sage HRMS. The mapping rules applicable to other fields and distribution codes are the same as those for Earning Codes.

Accrual

You can map all Sage 300 ERP Payroll Accrual codes to generate Time Cards.

Users can use Time Cards in Sage 300 ERP Payroll to enter Attendance / Absence Transactions.

An example of an absence transaction might be vacation taken or sick days. In Sage HRMS, when users add an absence transaction for an employee, they must indicate the day the absence occurred and the number of hours taken. When Sage HRMS Link Process runs, all absence transactions that occurred during the transferred period will be transferred to Time Cards in Sage 300 ERP Payroll.

The mapping rules applicable to other fields and distribution codes are same as those applicable to Earning Codes.

Absence Transactions

- In Sage 300 ERP Payroll, you do not adjust the regular amount of hours worked if an absence transaction occurred. Sage HRMS Payroll does not support generating payment-type time cards; only accrual-type time cards can be generated.
- You must specify the **Sage HRMS Absence Reason Code** and the **Sage HRMS Attendance Plan Code** at same time to generate Time Cards accurately.
 - The Absence Reason Code is used by Sage HRMS Link to get absence transactions information from Sage HRMS.
 - The Attendance Plan Code is used by Sage HRMS Link to get the attendance information from Sage HRMS (for example, Year Carry-Over, Accrued, and Hours Available).
- If you only want Sage HRMS to transfer accrual records to Sage 300 ERP Payroll and will enter time absent into Sage 300 ERP Payroll directly, select None in the HRMS Absence Reason Code column. Otherwise, select the corresponding Absence Code.

Shift Differential Schedule

Shift Differential Schedules exist in both the Sage HRMS and Sage 300 ERP Payroll applications. However, the configurations of shift differential schedules are different in each application.

- In Sage 300 ERP Payroll, you can set up an unlimited number of schedules. Each schedule can have up to 4 shifts. For each shift you can specify a differential rate (an amount per hour paid in addition to the regular pay).
- In Sage HRMS, there is only one schedule (specified in the Shift Differential Codes code table). In the schedule, you can create an unlimited number of shifts. For each shift, you can enter a differential rate (amount or percentage per hour).

The Sage 300 ERP Payroll Shift Differential Schedule and related shifts can be mapped to the following four types of codes in Sage HRMS:

- HRMS Shift Differential Codes
- Four User-defined Employment fields
- Four User-defined Pay fields
- User-defined Code Table

Notes:

- You can specify a differential rate in both the Sage HRMS and Sage 300 ERP Payroll applications. However, when you map each Sage 300 ERP Payroll shift to a Sage HRMS shift, the differential rate assigned to the Sage 300 ERP Payroll shift will be used.
- In Sage HRMS, you can select a shift for an employee and then change the shift premium specifically for this employee (on the Current Pay form). This change will not be available in Sage 300 ERP Payroll once Sage HRMS Link Process runs. The differential rate assigned to the mapped shift in Payroll will be used in the employee's pay calculations. In other words, differential rates in HRMS entered for

employees are ignored in Payroll calculations. Payroll will use the differential rates entered in Payroll for the mapped HRMS Shifts.

- On the **Shift Diff. Schedule** tab, the Sage HRMS Code field drop down list does not display shift codes previously used. If you want to select a code that has already been used, you must first release the code by selecting None in the cell where it was previously selected.

Distribution Codes

You can map specific Sage 300 ERP Payroll distribution codes to each HRMS Org. Value. To do this, select an organizational level (Division, Department, Location or whatever you have set up in Sage HRMS) from the **Dist. Code Maps To** field.

You can also assign to have all HRMS codes mapped to one Payroll distribution code. To do this, simply select a field from the **All Sage HRMS Code Map to One Dist. Code** column.

Note: In HRMS, if an employer has no codes at the employer level, all codes default to the enterprise level. However, if an employer has only one code at the employer level, only that code will be available for selection in the drop down list(s).

Transferring Employee Information with Sage HRMS Link

Once you have set up the database connection between Sage HRMS (HR) and Sage 300 ERP Payroll (Payroll) via the Database Configuration page, and have completed the mapping process on the Employer and Employee Configuration pages, you can transfer employee information from HRMS to Payroll. To do this, complete the following steps:

1. Choose **HRMS Link Process** from the Sage HRMS Link directory. This displays the Sage HRMS Link Process form for selecting employee records to be transferred from HRMS to Payroll.

Note: Only one user can access the Sage HRMS Link Process at a time. When Sage HRMS Link Process is open, no configuration forms can be opened, or configuration changes saved.

2. Use the Finder to select the **Profile ID** from which you wish to transfer employee records, and then click the **Get Employee** button to display a list of the employees to be transferred.

You can change the employee selection by selecting or clearing the employee status boxes at the top of the form, by selecting a specific pay frequency, by selecting a specific Organization Level, by selecting a specific Organization Code, and/or by setting a specific Employee ID range.

You can also select or de-select employee records for processing without changing the overall selection criteria by changing the value of the cells in the Include column to Yes to include the item or No to exclude the item.

3. Three check boxes in the Profile allow you to Calculate Accruals for Salaried Employees, Overwrite Distribution Codes, and Overwrite Payroll Pay Frequencies.

You can define whether to transfer an employee as Hourly regardless of HRMS setting by checking or un-checking the **Calculate Accruals for Salaried Employees** box. For example, you can transfer the hourly rate of a salaried employee to Sage 300 ERP Payroll by checking the box.

Also, you can decide whether to overwrite the existing Distribution Code while updating existing records in Sage 300 ERP Payroll by checking or un-checking the **Overwrite Distribution Codes** box.

In addition, you can decide whether to **Overwrite Payroll Pay Frequencies** by checking or un-checking the box. HRMS supports 4 pay frequencies (Bi-Weekly, Monthly, Semi-Monthly, and Weekly), while Sage 300 ERP Payroll supports 5 additional specific pay frequencies (Daily, 22 per, 13 per, 10 per, and Quarterly). Say, for example, existing pay frequency is Daily in Sage 300 ERP Payroll, if you check the box, the program will overwrite the existing pay frequency (Daily) with whatever the value it retrieved from HRMS setting; otherwise, the program will not update the existing 5 specific pay frequencies.

4. Select the benefits that you want to include or exclude in the Benefit section at the bottom of the screen.
5. When you are ready to transfer employees, click the **Process** button.
6. After the transfer is complete, the transferred data will appear on screen for review.
7. Click the **Print** button to print a report of this data.
8. After reviewing the report, click **Update** to complete the process and transfer the data to payroll.
9. After updating Payroll, you can print a report of the update results which will show what was updated and any errors that occurred during the update. Also, you can:
 - View the updated employee records in Sage 300 ERP Payroll.
 - Export the reports to a file to keep a log of all information that you have transferred.
10. You can also transfer absence transactions from Sage 300 ERP Payroll to HRMS by creating Accrual payouts. After the accrued payroll is posted, select the desired employees and then click **Transfer Time Taken**.

Note: If employee records already exist in Sage 300 ERP Payroll, you must make sure that you use the same employee ID in Sage HRMS that you use in Sage 300 ERP Payroll. Otherwise, you may have two records for the same employee when you transfer the employee records from Sage HRMS to Sage 300 ERP Payroll.

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 Sage HRMS.

Customer Support: For knowledgebase articles and resources such as live chat, visit <https://support.na.sage.com> or contact Sage HRMS Customer Support at 1-800-829-0170 (US) or 1-800-330-2607 (Canada).