

Setting up Employee Defaults

Available in Sage 50 First Accounting and higher

Sage Advisor

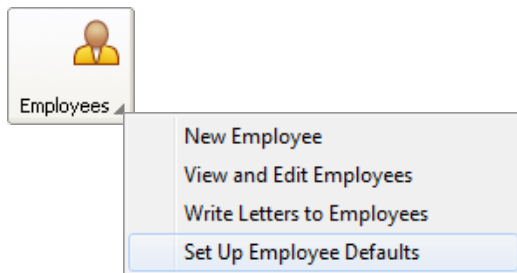
Quick Reference Guide

What are Employee Defaults?

Employee Defaults are basic information you enter that **applies to most of your employees**. Entering Employee Defaults can save you time because some of the information is automatically filled in for new employees you set up. You can change this information for each employee if necessary.

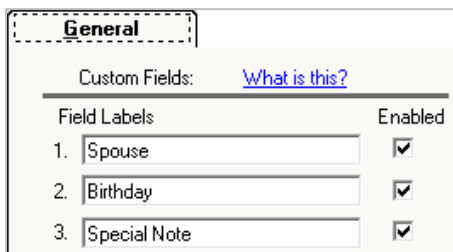
How do I access Employee Defaults?

Go to the **Employees & Payroll Navigation Center**, and click Employees, and then select Set up Employee Defaults. You need to complete the Payroll Setup Wizard first before accessing Employee Defaults. That's because the wizard will create most of the default information for you.

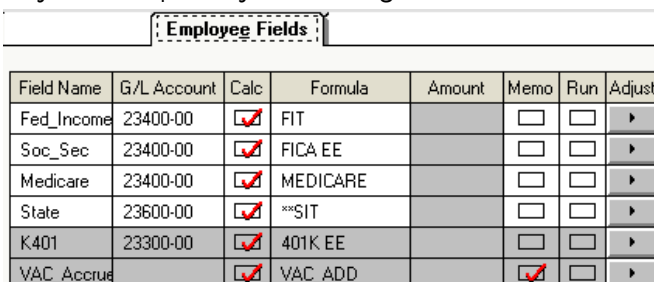


What kind of information can I enter?

- **Custom Fields** – You can record and track any information that you need about your employees that is not already in Sage 50. First, create the labels for custom fields in Employee Defaults. Then you can enter the actual data on each employee record.

A screenshot of the 'General' tab in the Employee Defaults setup window. It shows a section for 'Custom Fields' with a 'What is this?' link. Below this is a table with three rows, each representing a custom field. The first row is 'Spouse', the second is 'Birthday', and the third is 'Special Note'. Each row has an 'Enabled' checkbox, all of which are checked.

- **Employee Fields** (Available in Sage 50 Pro Accounting and higher) – displays employee taxes (such as Federal Income tax, Social Security, etc) and benefits (such as Retirement plans, vacation, etc). Rows that are grayed out were set up in the Payroll Setup Wizard. You can modify these fields in Payroll Settings (Employees & Payroll Navigation Center > Payroll Setup > Payroll Settings).

A screenshot of the 'Employee Fields' table in the software. The table has columns for Field Name, G/L Account, Calc, Formula, Amount, Memo, Run, and Adjust. The rows are: Fed_Income (23400-00, Calc checked, Formula FIT), Soc_Sec (23400-00, Calc checked, Formula FICA EE), Medicare (23400-00, Calc checked, Formula MEDICARE), State (23600-00, Calc checked, Formula **SIT), K401 (23300-00, Calc checked, Formula 401K EE), and VAC_Accrued (Calc checked, Formula VAC_ADD). The first five rows are grayed out, while the last row is not.

- **Company Fields** (Available in Sage 50 Pro Accounting and higher) – displays company paid taxes (such as Federal and State Unemployment taxes) and company contributions (such as 401K)

Company Fields					
Field Name	Liability	Expense	Calc	Formula	Adjust
Soc_Sec_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	FICA ER	▶
Medicare_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	MEDICARE	▶
FUTA_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	FUTA ER	▶
SUI_ER	23400-00	72000-00	<input checked="" type="checkbox"/>	***SUI ER	▶
K401_ER	23300-00	73000-00	<input checked="" type="checkbox"/>	401K ER	▶

- **Review Ratings** (Available in Sage 50 Complete Accounting and higher) – Enter up to 10 ratings that your company uses to review employees (Outstanding, Above Average, Unsatisfactory, etc).

Review Ratings	
Performance Review Ratings:	
Field	Ratings
1	Outstanding
2	Above Average
3	Satisfactory
4	Below Average
5	Unsatisfactory

You may add up to 10 Performance Review Ratings that your company uses when rating or reviewing employees. [Learn more](#)

- **Employment Status** (available in Sage 50 Complete Accounting and higher) - Enter up to 10 Employment Statuses (such as current employee, terminated, leave of absence, etc).

Employment Status	
Employment Status:	
Field	Status
1	Current Employee
2	Terminated
3	Leave of Absence
4	Dependent (COBRA)
5	Non-employee

You may add up to 10 Employment Statuses. You can create new statuses or edit the ones we have provided for you. [Learn more](#)

Did you know?

- **Memo** fields allow you to track information without making a general ledger entry or calculation. An example of a memo field is vacation or sick hours.
- **Run** fields keep a running balance from year to year. These payroll fields do not get reset to zero after closing a payroll year. This is useful if you allow vacation balances to carry over to the next year.

Employee Fields							
Field Name	G/L Account	Calc	Formula	Amount	Memo	Run	Adjust
VAC_Taken		<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input type="checkbox"/>	▶
VAC_Remain		<input checked="" type="checkbox"/>	VAC_REM		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▶