

# Sage WageEasy

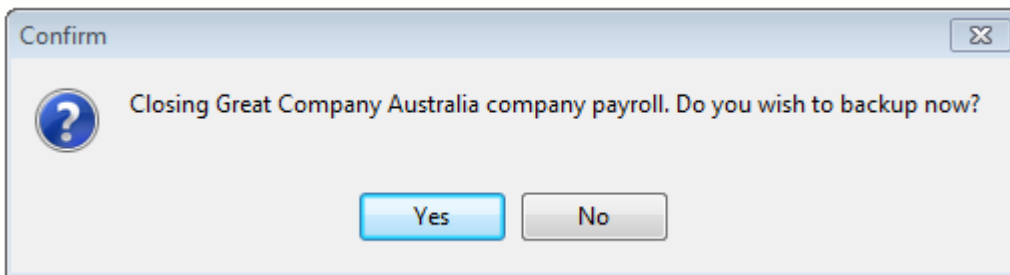
## Creating your Sage WageEasy Database

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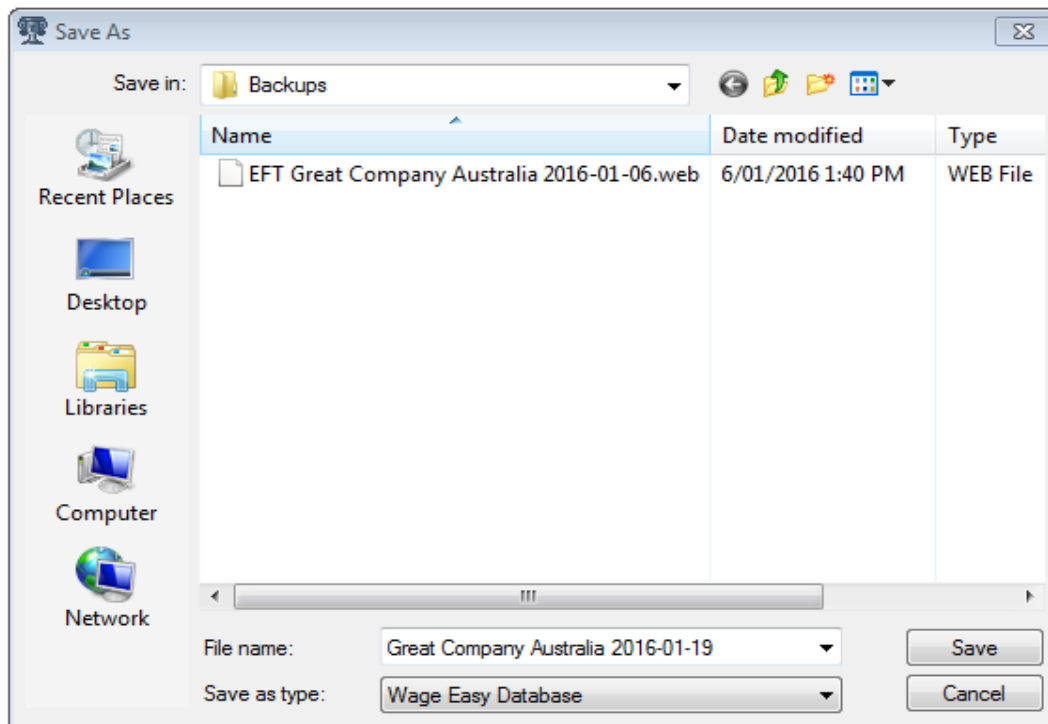
Once Sage WageEasy has been installed, please click on the Sage WageEasy Payroll Icon on your desktop that you will now find located there.

Click on the file menu then new company

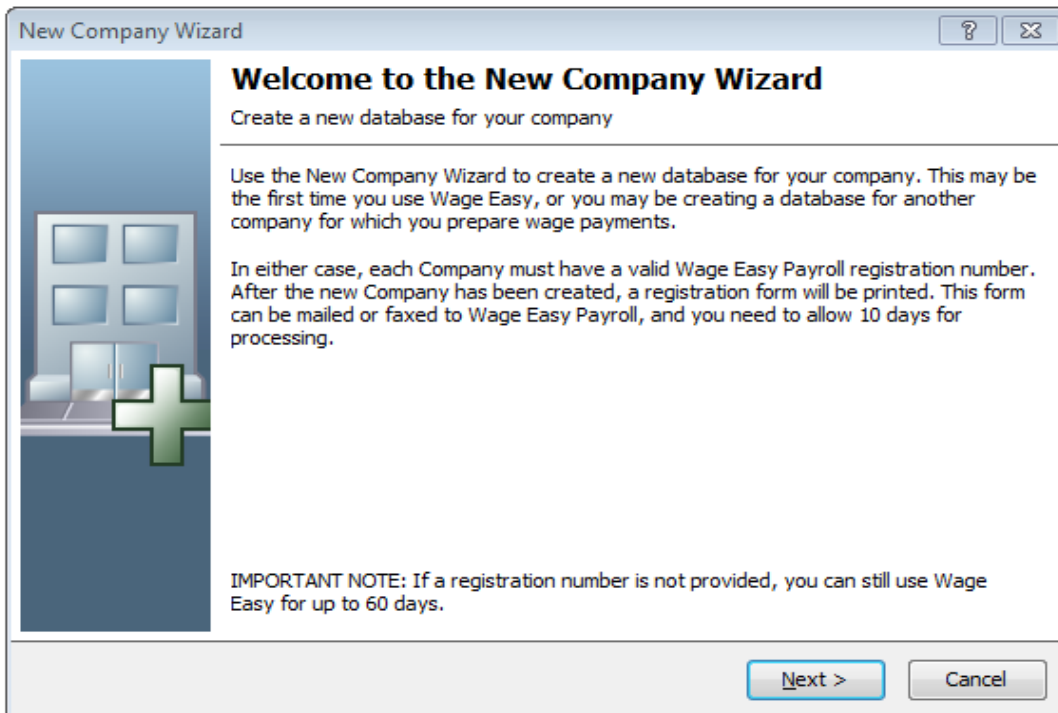
The below box will come up, choose yes



Save a backup



The below New Company Wizard will appear to step you through the process of creating the company file, which will become the database, with a file extension of .wed



The Next option will initiate the process.

The Items that will be required during this process are;

- Company Name and Trading Name ABN & ACN
- The Active Licenses purchased
- The Contact Person's name and Email Address
- The Company Address details and Postal Address if different
- The Pay Cycle and Pay Period Ending date (PPE)

**New Company Wizard**

### Company Details

Please enter your Company's name exactly as it will appear on your pay slips and other print outs. It is important that the name is spelled correctly, as once your Wage Easy software is registered, you cannot change the spelling without obtaining a new registration code from Wage Easy Payroll.

In addition, the number of active employees you can have in your database is determined by the number you enter below. This will also require a licence change should you wish to increase the number at some time in the future.

Company Name

Trading Name

ACN  ABN

No. of Employees

Please enter your Wage Easy Client Number below. This information is required for the registration process and will also be requested when you contact the Help Desk. Ring 1300 924 332 if you don't know your client

WE Client Number

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The first screen is a mandatory screen which requires the Company's Name and Trading Name to be entered along with the ACN and ABN if applicable.

When Sage WageEasy is purchased, you purchased the Software with an amount of licenses. These licenses are based on the amount of Active Employees you pay each continuous cycle.

In Sage WageEasy Payroll terms, this No of Employees can often be referred to as the Number of Active Licenses.

The No of Employees is what eventually gets licensed to this data base, and should be in line with the amount of Active licenses you purchased with the program.

You may find that, initially you will need to be above this amount, for bringing forward Year to Date Financial Totals. During this process, please incorporate into this "No of Employees" count, the terminated Employees who you may have paid in this Financial Year. Their financial information will be required, in order to reconcile with the old payroll system.

Once the Terminated Employee's financial information has been entered, they are given a termination date, which will discount them from the Active Employee list.

Once this screen has been populated accordingly please go next

This date represents the End of the Financial Year. This date is an automatic default setting for the Australian Taxation Year. All that is required is a confirmation by ticking in the box. Click next

The previous screen is for the Company's Contact details, as well as the details of the Person we are to contact for any Sage WageEasy Payroll items or notifications.

Please ensure the email address that is entered is the email address where we are to send all correspondences to.

Please then select next

New Company Wizard

### Postal Address

If the company's postal and street addresses are different, click on the Same as Company Address check box to remove the tick, and then enter the company's postal address as required. This information may be used in reports.

Same as Company Address

Postal Address:

City:

State:  Postcode:

Country:

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If the Company's Postal address is the same as the Company's address, please select "Next" and leave the tick in the box.

If the Postal address is to be different from the previous screen please remove the tick from the "Same as Company Address" and then populate with this alternate Postal Address.

This Postal address can in fact, be used for Reports in Sage WageEasy Payroll.

Please then select next

New Company Wizard

### E-mail Delivery Settings

Wage Easy Payroll can automate the e-mail delivery of reports - superannuation and union fees for example. Skip this page if you don't want this feature, or if you intend to provide this information at a future time.

The SMTP Server and Port fields identify the mail server for outgoing messages. You may be able to get this information by viewing the server properties or settings for the mail account used in your standard e-mail program. Otherwise, contact your Internet Service Provider or LAN administrator.

In the E-mail Name field, enter the name to appear as the Sender of the e-mail. In the E-mail Address field, enter the e-mail address to be used as the Sender of the e-mail. This address will also be used as a return address for any replies or transmission problems.

SMTP Server:  Port:

Server User Name:

Server Password:

E-mail Name:

E-mail Address:

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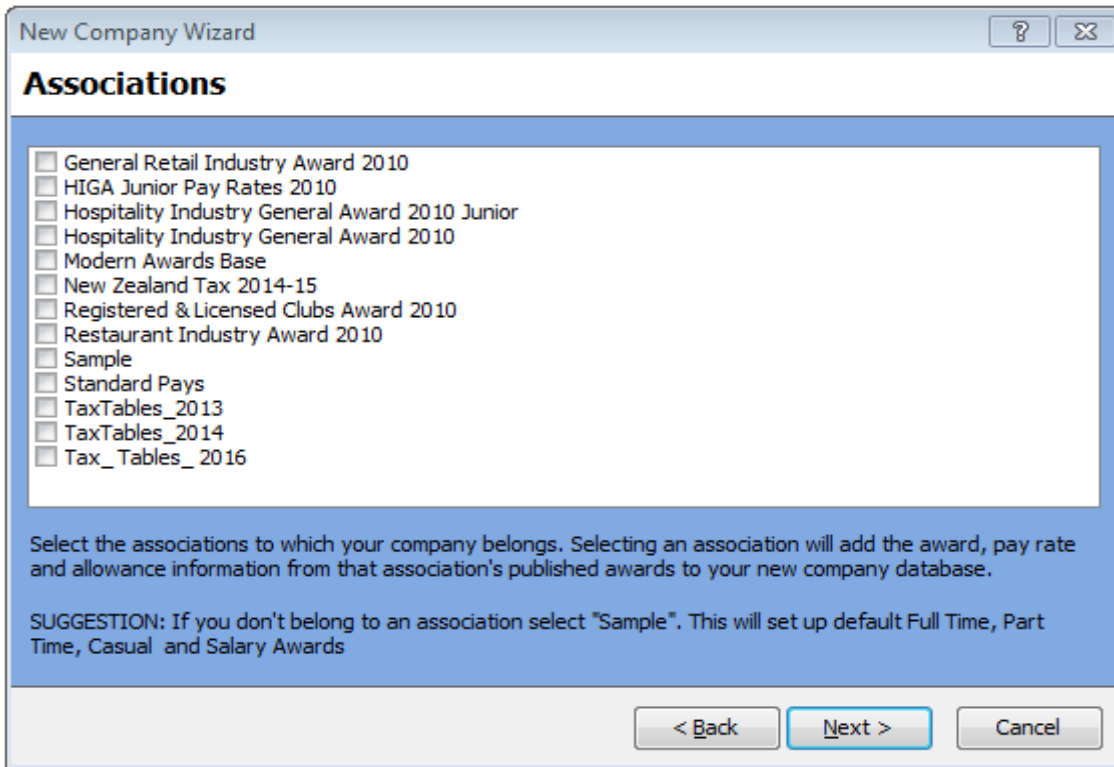
If you would like to email Pay slips or some Reports, this screen will require the server details in order to enable this function.

It may be best to get the IT department involved, or their approval, as often there can be security or email account size limitations that can affect this function.

Please remember that this screen is not mandatory in order to complete the New Company Set Up.

This function can be revisited and set up through Company details at a later stage.

If the details of these items are not known please select next to continue.



This screen is where you will load the Association that your Employee's Employment conditions and entitlements are derived from, or constrained by.

Please be aware, that the PDLs have been created by us, and therefore they are in accordance with our interpretation of the Awards as written.

They may not be representative of how you interpret the Awards.

Items such as Base Pay Rates, Allowances, Penalty payments and Shift loadings may not necessarily be up to date.

You must check through the items loaded by the PDL, and amend or edit as necessary so that your interpretation of the Awards are configured and reflected in these configurations.

Our intention, by creating these PDLs, is to give you a foundation or a head start so the Payment items do not need to be set from scratch.

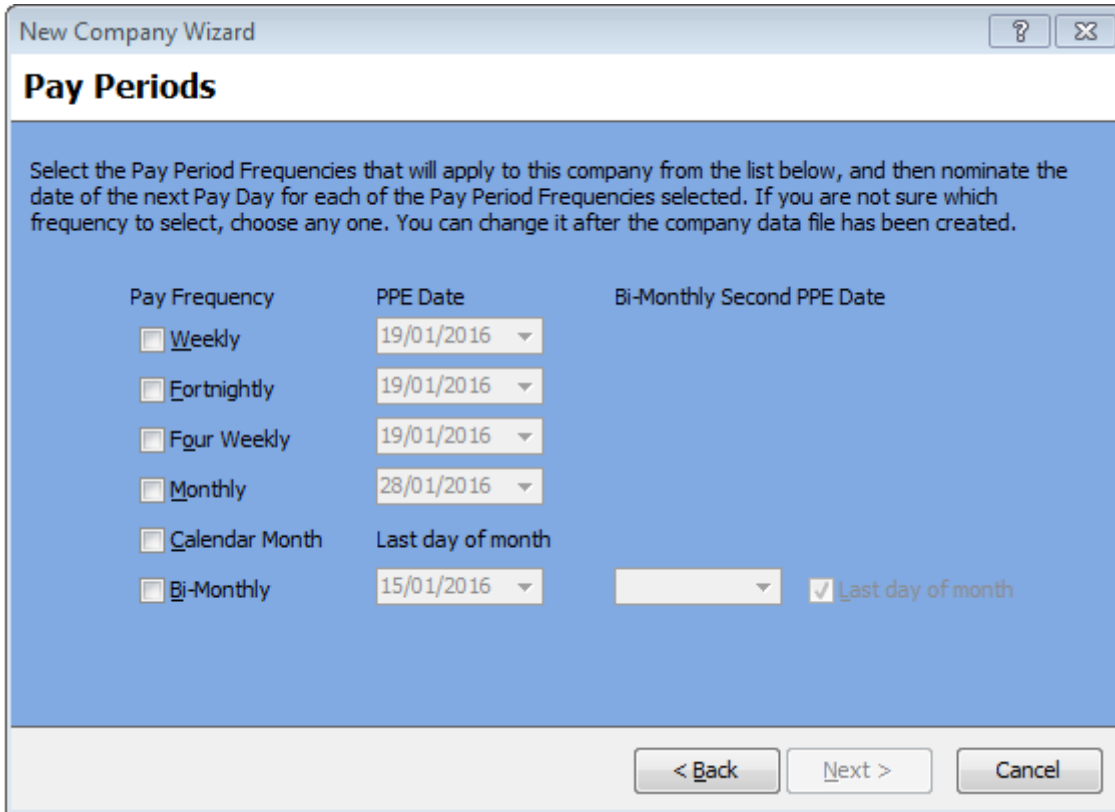
Ultimately the responsibility for these items must be in agreement with your own interpretation of the Associations Awards, Pay Rates, and Allowances that you utilize to pay your Employees.

At present you may be unable to locate your chosen Association, or your Employees are on Employee Agreements. Please select the "Sample" Association which will give you a beginning. This Association is a fictitious one and has been configured with some generic settings.

Your specific requirements will be configured later, once we have received the necessary documentation.

It can be renamed if need be and then referenced as such on the Pay Slip of the Employees.

PDLs can be loaded into the system at any time if required.



This is the screen where you will define your Pay Period Endings which will fall in line with your Pay Cycles.

Within Sage WageEasy Payroll you can set up multiple Pay Periods in the one data base if need be.

Meaning, you can have Weekly's, Fortnightly's and Monthly's all running consecutively.

Once you have selected the Pay Cycles required, you will need to allocate a date. This date needs to be the last day of the Pay Cycle, the Pay Period Ending date. This will come to be referenced in Sage WageEasy as the PPE.

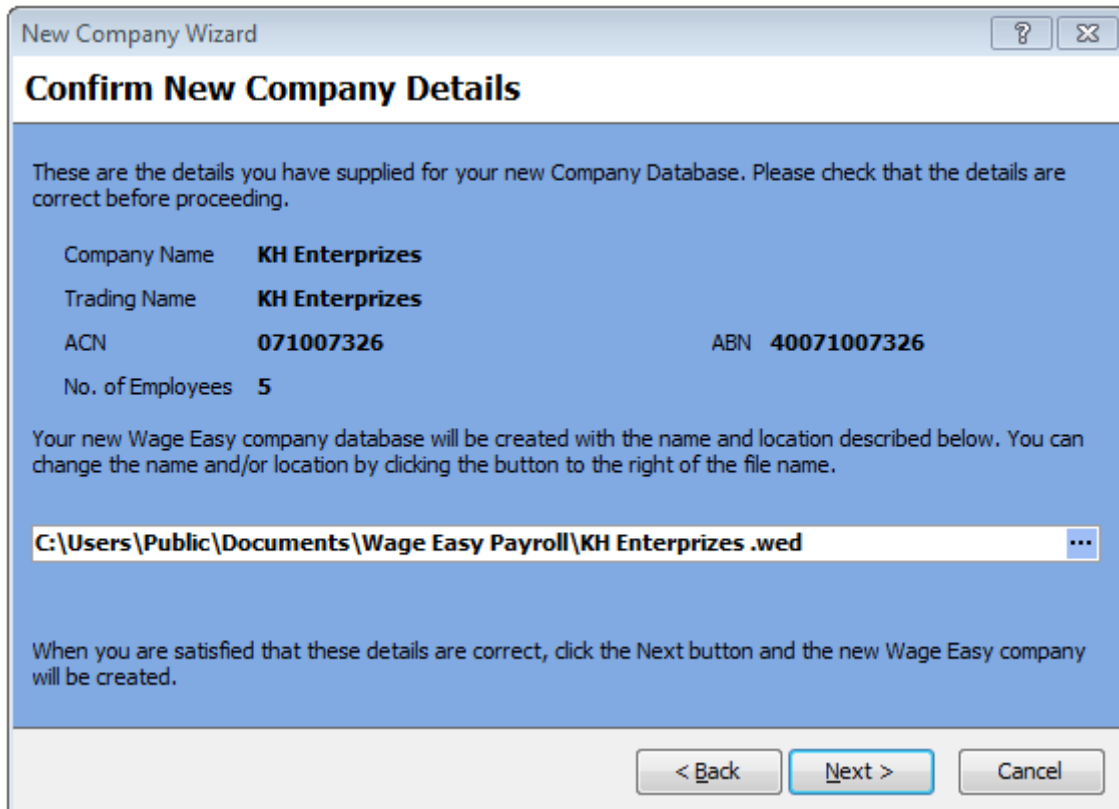
What you will need to be mindful of, is that sometimes these Pay Periods may cross over on certain dates. The result is that the Pay Cycles will merge during reporting, as when selecting this particular Pay Period Ending date, there may be multiple cycles attached.



An option would be to process those employees within one of the cycles and then create all the necessary Reports.

The Employees remaining should be those attached to the other Pay Period Ending. Then process these Employees and create the Reports required.

Whilst this screen needs to be populated before moving forward, additional Pay Periods can be added at a later stage, through the Company details if required.



This is the last stage of the Database creation.

It will briefly recap the Company details and the number of Employees to be allocated in this data base.

This screen also indicates the details of the Company File/database that will create, but also the location where it will create to.

This location is a default setting in Sage WageEasy to where the database will currently create to.

At this stage, there are a couple of options to think about.

If there is only one user then it would be recommended to allow the default setting to remain. By selecting next, both the Application and the database are on the local drive.

If there are going to be multiple users, but only one user creating the initial database set up requirements, then it would also be advisable to allow the default setting to remain. Once this user has set the rest of the data base up, as required, the file can then be moved to the Network location for all users to access.

If there are multiple users assisting with the setup, by using the ellipsis, the creation file path can be changed and redirected to the Network drive where it is to reside.

This will mean that all users will have the Application installed locally, and the database is located on the Network drive for all to access immediately.

When the database resides on the Network, it means that only those with the Application installed on their machines will be able to Open and Read the database.

Selecting Next will Create and Save the database/company file to the designated location in the file path.