

Year 2017: Sage BusinessWorks Year End Tips Guide

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Year 2017: Year End Tips for Sage BusinessWorks

Important Notes!

Do not install 2018 service pack 1 or 2017 service pack 4 – Make sure you have finished processing W-2s for 2017 before you install service pack 1 or 4.

Although Sage BusinessWorks Accounting retains five years of payroll history, it is essential that you verify W-2 figures **before** closing December.

Because you must complete many tasks **before or in conjunction with the last payroll**, please take time now to read through any topics that may affect you.

When closing a module, if the close does not complete you will need to restore a backup. See article **18035** and **18696** or search **month end close**.

Section 1: General Information

Web Site Assistance

Tip: All referenced articles are found in the Knowledgebase. For example: See article **40434** or search **access knowledgebase**.

The Sage Customer Portal Web site provides you up-to-the-minute information, the ability to e-mail inquiries and suggestions to an analyst, and utilities to download documents and the latest releases of Sage BusinessWorks.

Access the Sage Customer Portal and Sage Knowledgebase from within Sage BusinessWorks:

- On the main Sage BusinessWorks menu, click **Help**. Then point to **Support and Service on the Web**, and click **Online Support**.

Access through internet at <https://support.sage.na.com>.

Sage City, <http://sagecity.na.sage.com> is another way to get valuable year end information. Under **Support Communities** select **Sage BusinessWorks** and then select **Forums** tab. Open the topic **BusinessWorks Year-end assistance**, which provides links for payroll year-end processing and video tutorials. Also, the **Blog** tab provides detail information for federal forms, free year-end web classes and important tips from Sage support analysts.

Help!

Help with all year-end processing is just a click away. On the main Sage BusinessWorks menu, click **Help**. Then point to **Module Help**, and click **[Module] Contents**. Click the **Index** tab and type the text you wish to search. For example, if you want more information on processing bonuses, here are the steps to follow:

1. On the main Sage BusinessWorks menu, click **Help**.
2. Point to **Module Help**, and click **Payroll** contents. Click the **Index** tab.
3. Type **bonuses**
4. Click **bonuses** on the list displayed.

ⓘ Throughout this document, look for the ⓘ symbol for Sage BusinessWorks Help topics to search.

Section 1: General Information

Back Up Data

Before you close any Sage BusinessWorks module, it is essential that you perform a complete backup of company data. You should retain this backup indefinitely, as it provides critical data for audit purposes. See article **17278**, or search **backup**, or follow steps below.

1. On the Sage BusinessWorks main menu, click **File**, and then click **Backup** to open the **Database Backup Wizard**. Click **Next**.
2. To back up company data, click the company ID to back up, and then click **Next**.
3. In the **Select Backup File Name** window:
 - a. Select a folder or drive from the list on the left. To store the data in a new folder, see the Help topic "Backup," and follow the steps to create a new folder.
 - b. Use the **Backup File Name** automatically created or type a **Backup File Name** at the bottom, and click **Next**. Be careful not to overwrite an existing backup that you want to keep. For easy reference, use a file name that includes the company ID and the date. Example: Sample123112.zip
 - c. Click **Start** to begin the backup. When the backup is complete, a message appears allowing you to back up another company. If you have multiple companies, click **Yes**, and repeat the steps above.

Notes:

- Please perform a backup within Sage BusinessWorks even if another backup utility is used.
 - If you are unable to backup due to an error message or message indicating you cannot achieve an exclusive lock, see article **17294** or search **stranded users**.
 - See page 5 for instructions on making a copy of a Sage BusinessWorks company.
- ⓘ For information on safeguarding Sage BusinessWorks data, search the Sage BusinessWorks Help Index on **Backup** and **Backups** or see article **17278** and search **backup**.

Adjusting Entries

After closing the fiscal year, you can post prior year adjusting entries to all modules **except Payroll**. See article **18022** or search **posting periods**.

- If a prior-year transaction affects G/L revenue or expense accounts, Sage BusinessWorks automatically rolls the values into retained earnings. No additional action is needed.
- Be sure to make the adjusting entry in the correct module. For example, if you need to make an adjustment to the cash account, you would normally make it through the Cash Management module. Making the adjustment directly in the G/L makes the bank reconciliation more difficult.
- **Important:** Do not perform a month-end (or year-end) close or rebuild in the Inventory Control Module during any phase of the Physical Inventory process. Sage BusinessWorks cannot retain book quantity information for a relative inventory update after the close or rebuild. See articles **18722** and **52028** or search **physical inventory**.

| Prior or Future Transactions | G/L | P/R | A/R, A/P, C/M, I/C, and O/E |
|---|--------------------------------|--------------------------------|------------------------------------|
| Prior month postings | Post 24 months back | Post current quarter only | Post 12 months back |
| Future month postings | Post 12 months ahead | No future month postings | Post 1 month ahead |
| Example: Current month = December 2017 | Post Dec 2015 through Dec 2018 | Post Oct 2017 through Dec 2017 | Post Dec 2016 through Jan 2018 |

Section 1: General Information

| | |
|------------------------------------|---|
| Module's current month? | On the main Sage BusinessWorks menu, click File , and then click System Status Report . On the window displayed, click the Module Information button. |
| Required parameter settings | <p>To post transactions to future or prior months see article 18767, set these parameters:</p> <ul style="list-style-type: none"> On the A/R menu, point to Utilities, and click Maintain A/R Parameters. In the Allow future postings list, select either Warning or Yes. On the main Sage BusinessWorks menu, click Utilities, and then click System Preferences: Verify Allow prior month postings is set to Yes. |

Section 2: Payroll Tips

| | |
|---------------------------------------|---|
| Completing End-of-year Payroll | <p>You must complete many end-of-year Payroll activities before or during the last payroll.</p> <ul style="list-style-type: none"> Contact an accountant or tax advisor for assistance regarding the taxable status of deductions or other pays. Back up data just before processing checks or handchecks. If you encounter a problem, you can restore the backup, correct the problem, and reprocess checks. |
| Yearly Close Checklist | <p>Sage BusinessWorks provides an End of Year Checklist for Payroll. After you have completed the last Payroll, review the Payroll – End of Year Checklist. To access the Checklist for a module go to the Sage BusinessWorks Launcher. From the Sage BusinessWorks Launcher select View and verify "Viewer" and "Modules" are selected. On the left side of the screen under Modules, select Payroll. In the viewer, the Common Tasks for the module appear. At the bottom, there are three tabs: Common Tasks, All Tasks, and Checklists. Select the tab for 'Checklists'.</p> |
| 2018 Tax Table Update | <p>The early Tax Table Update (TTU) will be available for download from the Sage Customer Portal in mid-December only for version 2017 and 2018. Because the update includes tax tables for 2018, install it only after you have printed W-2s and closed Payroll for December. Check customer portal late December for the early TTU service pack, See article 80066 or search tax table update</p> <p>Note: Processing a 2018 payroll before installing the 2018 TTU does not cause an issue, because Sage BusinessWorks automatically recalculates FICA, FUTA, SUI and SDI when you run a payroll after installing the update. Although table-driven taxes do not self-adjust, the difference is a few cents in most cases.</p> |
| Affordable Care Act (ACA) | <p>Important note: You will need to be on Sage BusinessWorks 2017 or 2018 to get the ACA forms and 2018 tax updates</p> <ul style="list-style-type: none"> Effective 2015, employers with 50 or more full time employees (or a combination of part time and full time employees equivalent to 50 full time employees) will be subject to the Employer Shared Responsibility provisions. See article 54913 or search affordable care. |

Section 2: Payroll Tips



Before Closing Payroll for December: Make a Copy of your Company

Create a Sage BusinessWorks backup before performing the December close. If you have not printed **and verified** W-2s and you need to process January's payroll, follow the steps below to create a copy or "clone" of the company data prior to performing a December close.

Important: Do not copy the folder in which the company resides to a new folder. Sage BusinessWorks does not recognize data in the newly-created folder as a company.

Have all other users exit the company and see article 17616 or search **copy company**, or use the copy company option below.

How to use the Copy Company option.

1. On the main Sage BusinessWorks menu, click **Utilities**, and then click **Maintain Companies**.
2. Click **OK** at the exclusive option message.
3. Click the **Lookup** button  to select the Company ID; click **Accept**.
4. Click the **Copy** button .
5. Enter a new **Company ID** (for example, PAY2017), and click **OK**. Also click '**Copy User security**' to grant same user security as in the original company.

Notes:

- Do not close Payroll for December in the "cloned" company. Use the "cloned" company for printing W-2s only. The cloned company is the archive company and used for printing purposes only.
- The OASDI limit for 2018 is **\$128,400**. If the early TTU is installed prior to printing W2s, you will need to *change the OASDI limit back to \$127,200 limit for the 2017 W2s.
- After closing in the current company, verify beginning balances for vacation and sick accruals. See article **19525** or search **vacation**.

* To change the limit go to the PR menu, point to **Taxes**, and click **Maintain Tax Tables**. Click the **Lookup** button and select **US**. Click the **Allowances, Limits and Rates** button or see article **18746** or search **fica limit**.

Verify SDI and SUI Rates after Installing TTU

Because the SDI and SUI rates vary from one company to another, the Tax Table Update (TTU) revises these fields in **Maintain Tax Tables** only. Sage BusinessWorks uses the values stored in **Activate States** (on the **Taxes** menu). After installing the 2018 TTU, verify that the rates in **Activate States** for SDI and SUI are set to the proper values for each company. See article **18703** or search **state rates**.

Section 2: Payroll Tips

Processing Fringe Benefits as a Lump Sum

IMPORTANT: Fringe Benefits must be processed and check printed prior to closing December.

Tip: If you created a fringe benefit deduction in a prior year, you can simply change the active dates. On the **PR** menu, point to **Utilities**, and click **Maintain Deductions**.

Employees must pay taxes on the monetary value of fringe benefits such as personal use of a company vehicle or the premium for life insurance in excess of \$50,000. Some employers record fringe benefits on each payroll throughout the year; others record a lump sum at the end of the year.

If you record a lump sum, you must include the fringe benefit as a company-paid deduction on the employee's last paycheck for the year. Here's how:

1. Set up a company-paid deduction that is taxable for the employee. On the **PR** menu, point to **Utilities**, and click **Maintain Deductions**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Company-Individual
 - **Taxable check boxes:** Consult a tax advisor for assistance
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the last paycheck.
2. Click the **W-2** button, and specify the W-2 box for the fringe benefit.
3. On the **PR** menu, point to **Employees**, and click **Maintain Employees**. Click the **Deductions** button, and add this deduction for each employee who received the fringe benefit.

Tutorials for processing **Fringe Benefits** are also available in the Sage Knowledgebase at <https://support.na.sage.com> Articles **51588**, **37161** and **20995**. See page 2 for instructions to log on to the Sage Portal.

For time card processing of fringe benefits, search the Sage BusinessWorks Help Index for "Fringe Benefits" or search for **fringe benefits** for multiple articles/videos.

Allocated Tips

Have you already processed your last payroll for the year?

Process a pay check with just allocated tips. Be certain to deactivate all deductions and all other pays except for the allocated tips other pay. Remember to reactivate them when finished.

Allocated tips are the difference between tips reported by an employee and the employee's allocation of 8% of the employer establishment's gross receipts for a calendar year. They are not included in the employee's income, nor does the employer withhold taxes from allocated tips. They are reported in Box 8 of the W-2 only. An Other Pay is used to record allocated tips:

1. On the **PR** menu, point to **Utilities**, and click **Maintain Other Pays**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Individual
 - **Taxable check boxes:** **Clear** check boxes for all taxable fields, including **Add to Gross**.
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the last paycheck.
2. Click the **W-2** button, and specify Box 8.
3. On the **PR** menu, point to **Employees**, and click **Maintain Employees**. Click the **Other Pays** button, and add this other pay for each employee for whom you must report allocated tips.
4. In **Time Card Entry**, select **Other Pay / Allocated Tips** from the **Earnings type** list.

i For the time card processing of allocated tips, search the Sage BusinessWorks Help Index for "Allocated Tips", see article **18645** or search **allocated tips**.

Section 2: Payroll Tips

Bonuses

Bonuses are taxable. Be sure to mark the Other Pay as taxable and select the **Add to Gross** check box.

If you create a time card for an employee receiving a bonus, that time card automatically overrides the standard time card you may have on file for them.

By law, bonuses are taxable. The employee is responsible for paying FWT. However, as an employer, you must normally remit both employer and employee FICA for all bonuses paid. (Regulations vary by state. Please consult a tax advisor for specific state requirements.)

What if I want to hand an employee \$500 in cash?

If you want the employee's bonus to be a flat amount, rather than the bonus amount less taxes use this formula to figure the gross bonus amount:

Formula: Net bonus amount / [1 - (Total tax rate ÷ 100)] = Gross bonus amount

Example: \$500 / [1 - (7.65 ÷ 100)] = \$541.42

To set up and pay bonuses in Sage BusinessWorks, please follow these steps, see articles **79431** and **18656** or search **bonus**:

1. On the **PR** menu, point to **Utilities**, and click **Maintain Other Pays**. Set the following parameters:
 - **Calculation method:** Variable, entered on time card
 - **Category:** Individual
 - **Taxable check boxes:** All taxable boxes should be marked. Be sure to select the **Add to Gross** check box. Even though you may not withhold FWT from the bonus, it is normally taxable, so the **FWT Taxable** check box should be selected. Consult a tax advisor for clarification on SWT.
 - **Active:** Select the **From** option button, and set **To** and **From** to the date you plan to use on the bonus paycheck.
 2. On the **PR** menu, point to **Employees**, and click **Maintain Employees**. Click the **Other Pays** button, and add this other pay for each employee who receives the bonus.
 3. Set any other pays to inactive that should not be included in the bonus. (Double-click the other pay, and click the **Inactive** option button.) Close the Other Pays window.
 4. In **Maintain Employees**, click the *Deductions* button. Set any deductions to inactive that should not be included in the bonus.
 5. In **Time Card Entry**, and using the example above, select the employee that is receiving the bonus. In the **Earnings** window, select the **Other Pay: Bonus**. In the **Earnings** window (using our example above), enter the grossed up earnings \$541.42. **Accept**, and save the time card.
 6. Run **PR, Processing, Automatic Payroll Calculation** for the employee. Review the **Payroll Register**. The payroll calculation will be adjusted in the next step.
 7. Open **PR, Processing, Manual Payroll Calculation**, and select the employee from step 5. You will receive notice that there is a calculated check on file. Select **Yes**, to use the calculated check information.
 8. Select the **Federal & State Taxes** button. Zero out the Employee **FWT**, **SWT**, and **SDI** withholding amounts. Click **OK** and **Save**. The payroll check is a correct net \$500.00 amount, and OASDI and Medicare have been correctly withheld.
 9. Print the employee's bonus check using **PR, Processing, Print Payroll Checks**.
- ① For the time card processing of bonuses, search the Sage BusinessWorks Help Index for "Bonuses" or search Sage Knowledgebase for **bonus**.

Payroll Overlaps Two Years

According to IRS regulations, the employee's tax liability is based on the payment date, not the time period the employee worked. Therefore, employees pay taxes in 2018 on any pay checks they receive after 12/31/17, even though work may have actually been performed in 2017.

Section 2: Payroll Tips

Deleting Terminated Employees

During the month-end December close, you will see the option to delete terminated employees. You can delete them as a group now or later on an individual basis through Maintain Employees. Payroll history is kept a minimum of two calendar years but can be increased up to five years. On the **PR** menu, point to **Utilities**, and click **Maintain Payroll Parameters**. In the **Years to keep history** list, select the number of years desired.

Note: You cannot delete an employee who has had activity within the last two calendar years or within the **Years to keep history** setting.

Third-Party Sick Pay

Third-party sick pay reporting requirements vary significantly from one plan to the next. For this reason, no option is available within Sage BusinessWorks to handle this function. Please review IRS Publication 15-A for information on the requirements that pertain to you. A tutorial for **Third-Party Sick Pay** is also available in the Sage Knowledgebase at <https://support.na.sage.com>, see article **51584** or search **third party sick**.

How Sage BusinessWorks Calculates Percentage-based Taxes

Sage BusinessWorks calculates percentage-based taxes (OASDI, Medicare, FUTA, SDI, and SU) on year-to-date taxable pays, rather than the taxable pay for the current pay period. See articles **17613** and **17792** or search **percentage based taxes**.

Percentage-based tax calculation formula:

$[(\text{YTD taxable pay} + \text{Current period taxable pay}) * \text{Percentage rate}] - \text{YTD tax withheld or accrued} = \text{Tax to withhold or accrue for this payroll}$

Source for figures in the formula above:

| | |
|-----------------------------|--|
| YTD taxable pay | On the PR menu, point to Employees , and click Maintain Employees . Click the Totals button. |
| Current period taxable pay | Calculated from time card entries |
| Percentage rate | On the PR menu, point to Taxes , and click Maintain Tax Tables (OASDI, Medicare, FUTA) or Activate States (SDI, SU). |
| YTD tax withheld or accrued | On the PR menu, point to Employees , and click Maintain Employees . Click the Totals button. |

Limitations: Sage BusinessWorks automatically self-adjusts over- or under-withheld taxes when you calculate payroll for an employee within the following limitations:

- Sage BusinessWorks adjusts taxes only when you process payroll. Therefore, Sage BusinessWorks makes no adjustments for a terminated employee.
- If you have over-withheld a tax, Sage BusinessWorks does not reduce the tax already withheld. The program calculates \$0.00 until the difference is made up.
- If an employee has met the taxable limit for the year, Sage BusinessWorks does not self-adjust. Contact Customer Support for further instructions.

940 Taxes

You will need to use Enhanced Tax Reporting to print the 2017 940 annual form. There are instructions in the Sage Knowledgebase at <https://support.na.sage.com>, see article **42541** or search **940** to determine Quarterly 940 tax liability.

Section 3: Processing W-2s

Verifying W-2 figures

We recommend that you first print W-2s on plain paper to verify the figures. Tutorials for processing **W2's in Enhanced Tax Reporting** are available in the Sage Knowledgebase at <https://support.na.sage.com> Articles **27775** and **37169** or search **w2 figures** for multiple articles.

Important Note:

Beginning with V2012 the option to print W-2s from within BusinessWorks is no longer available. When selecting **Print W-2 Forms** it will automatically launch **Enhanced Tax Reporting** listing the W-2/W-3 forms.

Laser printers: Print the actual payroll forms through the **Enhanced Tax Reporting** option. The **Enhanced Tax Reporting** option prints only the 4-up W-2 form - blank, perforated forms and must be purchased.

All forms may be purchased from Sage Checks & Forms website: <http://www.sagechecks.com/estore/> Phone: 1-800-617-3224, the IRS, or any office supply store.

Notes:

- Sage BusinessWorks does not accommodate side-by-side forms.
- Printing an alignment test first is recommended when using the **Print W-2 Forms** option.
- Selecting **Print W-2 Forms** in **PR, Taxes** menu will automatically launch **Enhanced Tax Reporting** to process W-2s.
- If a form still shows 2016, select it and continue processing. When the updated forms for 2017 are available, you will be prompted to run Automatic Updates, which will update the forms to 2017. This update will be available around mid-December.

Tax form information is available in the Sage Knowledgebase <https://support.na.sage.com>, see article **52613** or search **what tax forms to use**.

- ① For the processing of W-2 forms, search the Sage BusinessWorks Help Index for "W-2" or "Print W-2 Forms."

W-3

Beginning with Version 2012 W-3s can only be printed through **Enhanced Tax Reporting**.

Section 3: Processing W-2s

Special Cases: Local Tax and Box 12 Entries

W-2 forms have space for only two local taxes and four entries in Box 12. If an employee's W-2 exceeds this limit, the IRS requires that a second W-2 be created. Use the **Enhanced Tax Reporting** option in Sage BusinessWorks to produce the required second W-2.

Note:

- A warning appears when a deduction or other pay is added to the employee's record that exceeds the number allowed on the W-2. However, no warning is issued at the time the W-2 is printed.

Editing W-2's in Enhanced Tax Reporting

If employee totals were manually updated in setup mode, then the W-2 information will need to be edited in the **Enhanced Tax Reporting** grid. Tutorials for processing **W2's in Enhanced Tax Reporting** are available in the Sage Knowledgebase at <https://support.na.sage.com> Articles **27775** and **37169**. See page 2 for instructions to log on to the Sage Portal.

Section 4: Electronic Filing

General Information: Electronic Filing

The Social Security Administration requires that you obtain a User ID and choose a password for electronic filing. Please call 1-800-772-6270 or visit their website, <http://www.ssa.gov/bso/bsowelcome.htm> for more information.

The **Enhanced Tax Reporting** option includes the ability to file W-2s electronically.

California Form DE 9C

California employers with 250 or more employees must file the DE 9C electronically. The **Enhanced Tax Reporting** option includes the ability to electronically file the DE 9C file. For complete information, point to **PR, Taxes** and click **Enhanced Tax Reporting**. On the window displayed, click **How do I...**

Section 5: Accounts Payable

Before You Close A/P for December

You must print 1099 forms **before** closing December. **When you close the calendar year, all 1099 information for 2017 is removed.** If you have 1099 vendors, print and review the 1099 Worksheet. When the figures have been verified, print 1099 forms prior to closing December. Even though your fiscal year may not coincide with the calendar year, be sure to print the 1099 forms at the end of the calendar year.

1099 Form Types

Important!

Print 1099s **before** closing December. Closing December sets the Maintain Vendors 1099 payment information field to \$0.00.

Enhanced Tax Reporting is used to print 1099 forms and uses the blank 4 part pre-perforated 1099 forms for the Payer. You will also need to purchase the preprinted (red ink) 1099 Federal forms and preprinted (red ink) 1096. Tax form information is available in the Sage Knowledgebase <https://support.na.sage.com>, see article **52613** or search **what tax forms**.

Notes:

- 1099-MISC forms may be purchased from Sage Checks & Forms website <http://www.sagechecks.com/estore/> Phone 1-800-617-3224, the IRS, or any office supply store. (You must use the 1099-MISC form; other forms are not compatible with Sage BusinessWorks.)
- For both dot matrix and laser printers, use a standard 8.5" x 11" printer driver for printing reports.

ⓘ For the processing of 1099 forms, search the Sage BusinessWorks Help Index for "1099" and "Print 1099 Forms", or see article **18046** or search **process 1099**.

Electronic Filing 1099s

Sage BusinessWorks creates an electronic file for 1099 forms using the Enhanced 1099 Reporting option for a nominal fee. On the **A/P** menu, point to **Vendors**, and click **1099 Processing**.

Call us!

If you have a current ClientCare or PartnerCare phone support plan and have any questions about year-end processing, contact Sage Software Customer Support at 1-800-447-5700 and press 3. We are available from 6:00 a.m. to 5:00 p.m. Pacific time, Monday, Tuesday, Thursday, and Friday and 6:00 a.m. to 4:00 p.m. on Wednesday. (We close at 4:00 p.m. on Wednesdays for staff development.) If you wish to purchase a support plan or upgrade your plan to include phone support, please call 1-800-447-5700 and press 1.

We're always here to help! Join us 24/7 online:

- Browse help articles, download the latest updates to your software, and access live chat: [Sage Knowledgebase](#)* (*Some resources require an active Sage Business Care plan.)
- Share product tips, find out what's new in our blogs, and view the latest Sage videos: [Sage City](#)
- Access an extensive library of on-demand learning topics and comprehensive classes: [Sage U](#)