BUSINESS **SOLUTION** PROVIDERS

Sage Partner

CONNECTING HRMS WITH SAGE 100
Simplifying Employee Management

The built-in payroll module in Sage 100 is great when it comes to cutting checks and withholding taxes. But some companies with larger workforces need to take it a step further to automate every aspect of employee management from hire to retire. That's where the integration between Sage HRMS and Sage 100 comes in. Here's a closer look.

What is Sage HRMS?

Just like Sage 100 streamlines all your accounting and operational tasks, Sage HRMS improves HR efficiency with a variety of features and components that include:

- **Applicant Tracking & Onboarding:** manage recruiting and onboarding with a paperless, online process that's easy and efficient.
- **Benefits Enrollment:** enable employees to make their own benefits selection or update their file with life events like marital status, dependents, and beneficiaries.
- **Time & Attendance Tracking:** A web-based solution that collects, analyses, and manages your employees' attendance and labor data.
- **Employee Self-Service:** A personal HR portal that enables employees to see and update their personal information, request time off, download paystubs, and more.
- **Much More** … including Training Management, Workforce Reporting, and HR Analytics.

The Benefits of Integration

Because of the seamless integration, all newly-hired or updated employee information entered in Sage HRMS is easily transferred to Sage 100 Payroll, and vice versa. That's added efficiency that you wouldn't get with two stand-alone applications which includes the following benefits:

Payroll Setup Detail Page: All required Sage 100 Payroll employee setup information is automatically installed in Sage HRMS and included in the new hire, re-hire, and job promotion actions.

Job and labor codes: You can map Sage HRMS job codes to Sage 100 Payroll labor codes.

Time-off Transfers: Easily transfer absence transactions entered in Sage 100 Payroll to Sage HRMS.

Transferring Pay History: After a payroll is processed, you can use the integration link to transfer pay history for a date range from Sage 100 Payroll to Sage HRMS Employee Self Service so your employees can view their pay stub information.

Ongoing Employee Updates: whether adding new employees in Sage 100 or modifying employee information in Sage HRMS, both systems seamlessly update the respective employee files.

[Contact Us](#) to learn more about streamlining HR processes with Sage HRMS.

How To Create a Custom Lookup View in Sage 100

Lookups are an important function in Sage 100. After all, what good is having all that data in your accounting system if you can't easily pull it up? However, the default lookups don't always display exactly what you need so let's take a look at how to customize your lookup views in Sage 100.

Custom Lookup Views

Anytime you click the magnifying glass icon, it launches into a lookup screen. Whether you're searching for vendors, customers, accounts, or any other data in Sage 100, lookups are a quick and easy way to find what you need.

But in some cases, hundreds or even thousands of records might display by default, forcing you to spend additional time searching and scrolling. With the following instructions, you can customize the fields, filters, and search criteria to really speed things up:

1. From any lookup window (after clicking the magnifying glass icon), choose the **Custom** button which launches the **Lookup Customization Wizard**.

2. In the **View** field of the Customization Wizard, select **Create New View** and give it a name in the description field (or you can select an existing view to modify it).

3. Click the **Default View** checkbox if you'd like this to be the new default lookup. Click **Next**.

4. On the next screen, you can **add, remove, modify, and rearrange the order of the columns** that display in the lookup. Note that the first column indicated by an asterisk (*) cannot be removed, but can be modified.
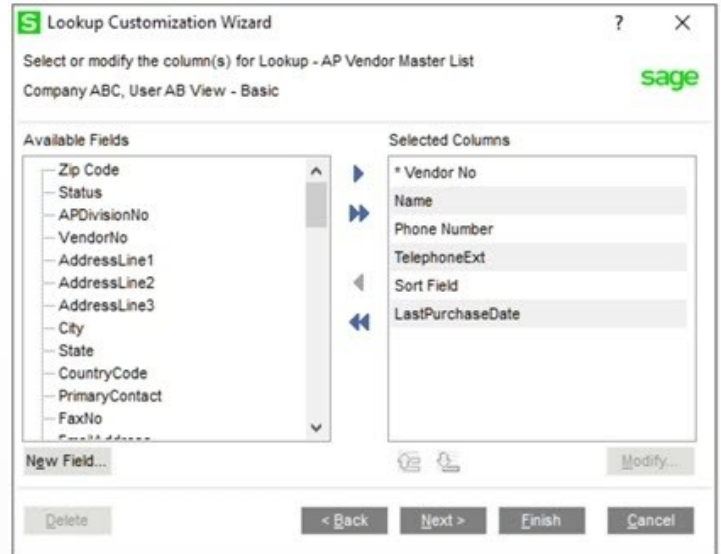
5. At this point, you can either click **Finish** if you're happy with your new customized view or click **Next** to launch a third options screen to define additional settings to modifying the Filters and further refine the data that will display in your lookup.

6. In the last Customization Wizard screen, you can make any final changes and then click **Finish** to create your new customized lookup view.

Now when you launch your new lookup screen, you'll notice that the title bar at the top left shows your new description along with an asterisk to indicate that this is a custom view.

Bonus Tip: Exporting Lookup Data

Did you know you can export the data in your new custom lookup to Microsoft Excel? Just click the Excel icon in the lower right corner of your lookup window and voila! The data is exported so you can further slice, dice and analyze.

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