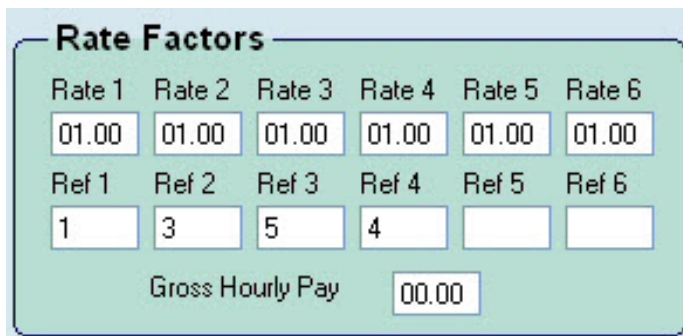**EGRESS SYSTEMS**

How to Export Data from Focus into Sage

Set-up

Before data can be exported to Sage it is necessary to record the Sage payroll references for each employee within Focus. To do this:

1. Click on the *Employees* button in the top left hand corner of the screen.
2. Select an employee from the tree-view.
3. Go to the *Rules* tab.
4. Set the References as appropriate for the pay element references used in Sage (see example below).
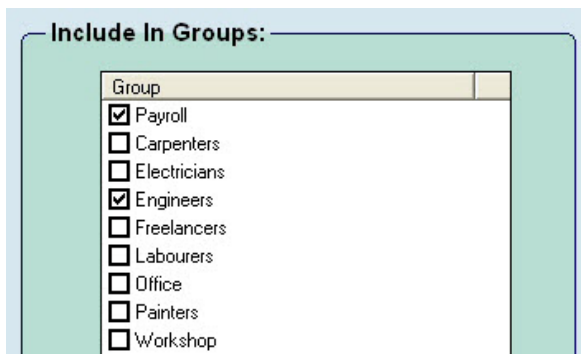5. *Save*.
6. Repeat for all employees.

It is also useful to assign all employees that you wish to extract to Sage into the *Payroll* group. To do this:

1. Click on the *Employees* button in the top left hand corner of the screen.
2. Select an employee from the tree-view.
3. Go to the *Groups* tab.
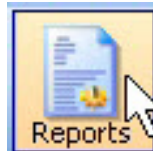4. Select the *Payroll* group as shown below.

EGRESS SYSTEMS

Exporting data to Sage

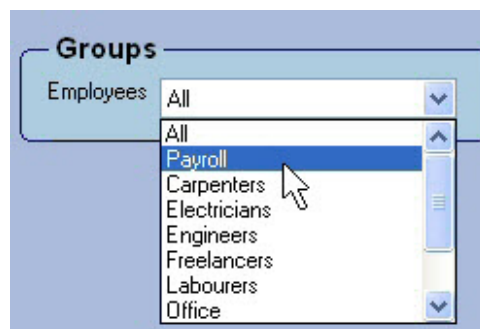1. Click on the **Reports** button in the top left hand corner of the screen.

2. Select the **Payroll** report from the tree view.

3. Select the **By Week** option if you wish rate totals to be calculated using a Weekly Rule.

4. Use the calendar to select the first day of the pay period.

5. Use the downward arrow to select number of weeks or days required (as shown).
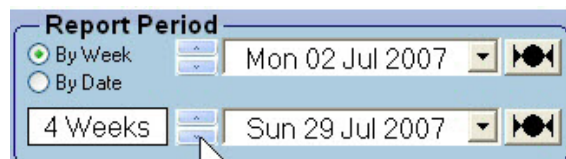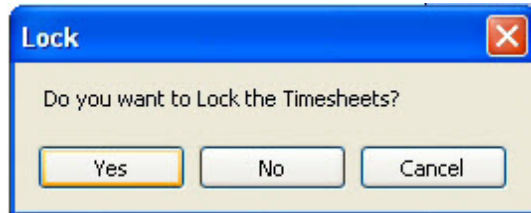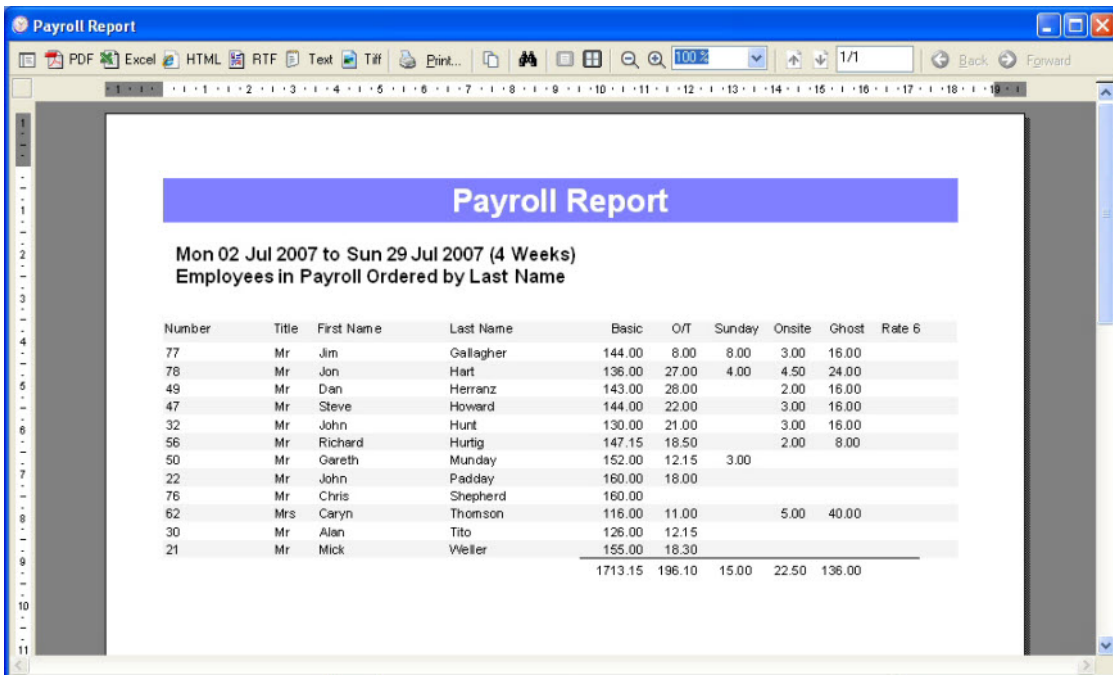
6. Select the **Payroll** group.

7. To print off a report to review click on the downward arrow next to the **List report** button and select the **Summary** report (as shown).
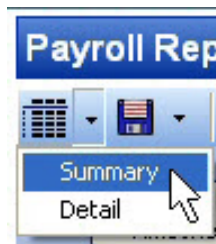
8. A prompt will appear asking if you want to *Lock the Timesheets*. Click **Yes** if you do not want people to edit the timesheets after you have printed the report. Otherwise click **No**.

A report like the one shown below will be produced.

9. To print the report click on the **Print** button at the top.

10. Review the data in the printed report and edit the timesheets if necessary.

The Old Wheelhouse, Hall Farm Yard,
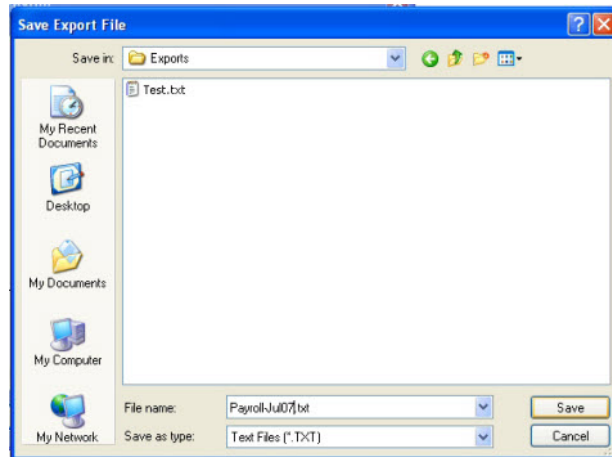Main Street, Kirklington,
Nottinghamshire, NG22 8NN

11. When you are happy that the payroll export is ready. Click on the downward arrow next to the **Save** button and select the **Sage** option.
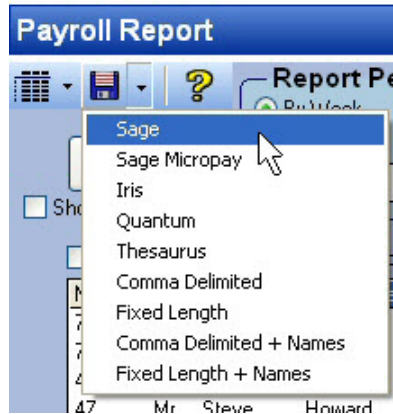
12. Click on the **Save to File** button.
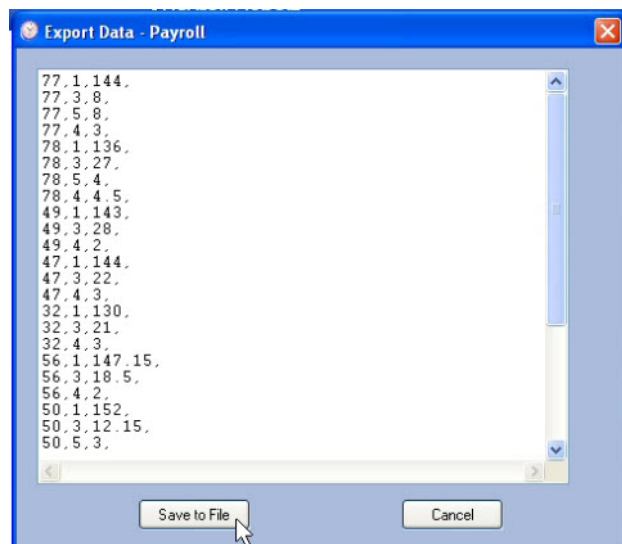
13. Choose a location to save your file, type in a file name and click **Save**.

14. Go into Sage and select the **Data Import** option from the file menu.

15. Select the **Import Sage Payroll Data** option. A wizard should start.

16. Follow the instructions presented by Sage which should be as follows:

    a. Click **Next**

    b. Select **Employees Payments (Hours and Rates)**

    c. Click **Next**

    d. Find the file you saved in Focus using the browse facility.

    e. Click **Finish**