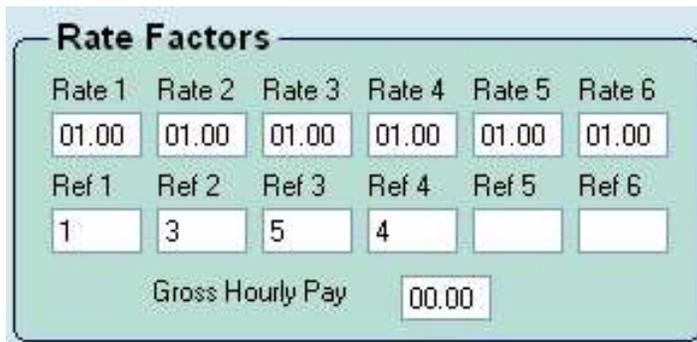


How to Export Data from Focus into Sage

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.

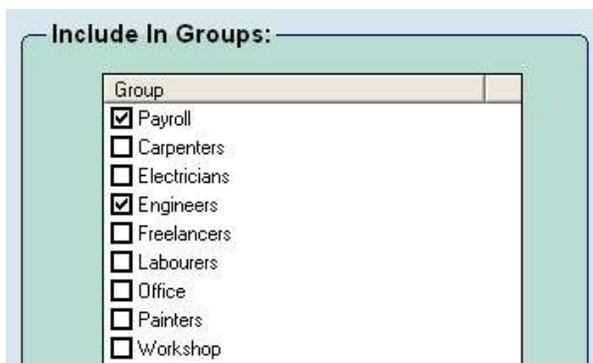


Rate 1	Rate 2	Rate 3	Rate 4	Rate 5	Rate 6
01.00	01.00	01.00	01.00	01.00	01.00
Ref 1	Ref 2	Ref 3	Ref 4	Ref 5	Ref 6
1	3	5	4		

Gross Hourly Pay: 00.00

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.



Group
<input checked="" type="checkbox"/> Payroll
<input type="checkbox"/> Carpenters
<input type="checkbox"/> Electricians
<input checked="" type="checkbox"/> Engineers
<input type="checkbox"/> Freelancers
<input type="checkbox"/> Labourers
<input type="checkbox"/> Office
<input type="checkbox"/> Painters
<input type="checkbox"/> Workshop

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.



The screenshot shows a web browser window displaying a "Payroll Report". The report title is "Payroll Report" in a blue header. Below the title, it specifies the period "Mon 02 Jul 2007 to Sun 29 Jul 2007 (4 Weeks)" and "Employees in Payroll Ordered by Last Name". The report contains a table with the following data:

Number	Title	First Name	Last Name	Basic	O/T	Sunday	Overtime	Gross	Rate 6
77	Mr	Jim	Gatlagher	144.00	8.00	8.00	3.00	16.00	
78	Mr	Jon	Hart	136.00	27.00	4.00	4.50	24.00	
49	Mr	Dan	Hernanz	143.00	28.00		2.00	16.00	
47	Mr	Steve	Howard	144.00	22.00		3.00	16.00	
32	Mr	John	Hunt	130.00	21.00		3.00	16.00	
56	Mr	Richard	Hurtig	147.15	18.50		2.00	8.00	
50	Mr	Gareth	Munday	152.00	12.15	3.00			
22	Mr	John	Padday	160.00	18.00				
76	Mr	Chris	Shepherd	160.00					
62	Mrs	Caryn	Thomson	116.00	11.00		5.00	40.00	
30	Mr	Alan	Tito	126.00	12.15				
21	Mr	Mick	Veller	155.00	18.30				
				1713.15	196.10	15.00	22.50	136.00	

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.

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:
- Click **Next**
 - Select **Employees Payments (Hours and Rates)**
 - Click **Next**
 - Find the file you saved in Focus using the browse facility.
 - Click **Finish**