

Export Employee Data from Sage 50 Desktop

Summary

This tutorial covers the process of exporting employee data from Sage 50 Desktop to a CSV file for integration with BuilderPal or other payroll and timesheet systems. This is useful for construction teams to sync employee details, time entries, and payroll information efficiently.

Prerequisites

- Access to Sage 50 Desktop software.
- A sample company file for testing (to avoid modifying live data).
- A text editor (e.g., Notepad) for verifying the CSV file.

Steps

1. **Open Sage 50 Desktop.** Use a sample company file (e.g., File > Open Company > Sample Company) to avoid modifying live data.
2. **Access Payroll Data Export.** Go to File > Data Export > Payroll Data Export.
3. **Select Employee Details.** Choose Employee Details and click Next. Select fields to export (e.g., EmployeeID, FirstName, LastName, Address, SSN, Phone, Email, HireDate).
4. **Save CSV File.** Click Browse to choose a save location, ensure "Include column headings" is checked, and save as a CSV file (e.g., employees.csv).
5. **Verify CSV.** Open the CSV in a text editor (not Excel, to avoid formatting issues) to confirm fields match your system's requirements. Rename to sage.csv if importing into systems like BrightPay that require it.
6. **Test Import.** Import the CSV into your system, mapping EmployeeID to your system's unique identifier to ensure proper syncing.
7. **Validate Data.** Check that records (e.g., names, IDs) imported correctly and align for future syncs with time entries or payroll.

Confirmation

The exported CSV file will contain the selected employee fields and can be successfully imported into BuilderPal or other systems, with data matching the source records.

FAQ

Q: Why is EmployeeID critical?

A: EmployeeID ensures accurate syncing with systems like BuilderPal for payroll or time tracking.

Q: Why test with demo data?

A: Using a sample company file verifies field compatibility without risking live data changes.

Q: Why avoid opening the CSV in Excel?

A: Excel may reformat sensitive fields like SSN or sort codes, leading to import errors in BuilderPal.

Q: What if I need more fields like PayRate or Department?

A: Select additional fields during the export step to customize the dataset for BuilderPal integration.

Q: How do I handle mid-year exports?

A: Export Employee Year-to-Date Figures separately via the same menu to include payroll balances in BuilderPal.

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