



# Sage 300 Construction and Real Estate

## Anytime Learning | Year-End Procedures Subscription 2012

The Year-End Procedures Anytime Learning subscription provides a convenient way to learn about the year-end release for Sage 300 Construction and Real Estate, and to learn how to generate year-end government forms, make adjustments to your General Ledger after closing the year, process supplemental wages and taxable fringe benefits in Payroll, and recalculate payroll subject-to amounts.

These lessons are designed for Construction Accounting and Real Estate customers who generate year-end government forms in Accounts Payable, Payroll, Canadian Payroll, or Property Management, or who process Payroll or make General Ledger entries.

Each 5- to 20-minute session is a recorded instructor-led presentation that includes guidelines and step-by-step demonstrations through key year-end tasks.

These lessons include instructions on how to use the Sage interface with Aatrix® Tax Forms and eFiling Service for filing year-end forms.

The Anytime Learning Year-End Procedures subscription provides access for a full year to 16 online lessons, available to your entire staff. With Anytime Learning, you can learn at your own pace, as your busy schedule allows. Your employees can view each lesson as many times as they want, anytime, from almost anywhere. All that is required is a high-speed internet connection and a computer with headphones or speakers. List Price \$149 US.

For more information about purchasing an Anytime Learning subscription, visit Sage University at [www.sageu.com](http://www.sageu.com) or call the Training Information team at 877-724-3285.

## General Year-End Release

### Year-End Update Information

What is included in the year-end software update? Does your company need to install it? Where can you find the update? This lesson also explains **when** to update your software so that you can accurately produce year-end government required forms and reports. Anyone responsible for processing payroll or generating year-end tax forms will benefit from this lesson.

## Payroll

### Download and Update Taxes

Avoid payroll headaches in the new year. Learn which tax rates are supplied by Sage 300 Construction and Real Estate, and how to correctly download them. Find out how and when to update the new payroll tax rate changes and verify that the new rates are in effect. This lesson is designed for anyone who processes payroll. View this lesson before you begin processing payroll for the new year.

### Process Bonus Pays and Supplemental Wages

Learn how to set up and process bonus pays and other types of supplemental wages. Find out how to use a separate tax rate for a supplemental pay and how to process a supplemental pay with taxes as the only deduction. You'll also be taught how to create a separate check for only supplemental pay. This lesson is designed for anyone who processes payroll.



## **Process Taxable Fringe Benefits**

Do you provide taxable fringe benefits to your employees, such as a company car or an insurance allowance? Find out how to set up and process this kind of benefit so that it is properly taxed and reported. Learn what corrections you can make if you neglected to process a taxable fringe benefit with the employee's regular wages. This lesson is designed for anyone responsible for processing taxable fringe benefits.

## **Recalculate Subject-To Amounts**

Have you discovered that certain taxable and subject-to earnings are wrong? Did you process 2013 payroll checks before installing the year-end update or before you updated taxes? Learn about the Recalculate Subject-to tool and what to consider before you use it to correct taxable and subject-to earnings. This lesson is designed for anyone who processes payroll or produces government-required reports.

## **U.S. Forms**

### **Customize the Template for Form W-2**

How does Payroll know what to print in each box of the W-2 form? The secret lies within the template! In this lesson, you will learn how to customize the W-2 template to accommodate your particular reporting needs. We'll also show you how to use formulas to calculate specific amounts. This lesson is a must for anyone produces W-2s.

### **File Form W-2**

How do you prepare to file W-2s? How can you tell if the amounts on the forms are correct? This lesson provides step-by-step detail on how to use the Sage interface with Aatrix to produce W-2s and W-3s, including form printing and the optional e-filing. Anyone who plans to generate W-2 forms will benefit from this lesson. You should also view the lesson titled *Customize the Template for Form W-2*.

### **Local Tax Reporting for W-2 Forms**

Learn how to link tax amounts for localities so that they will print on W-2 forms, and accumulate the way you want them to. Find out how to produce the W-2 forms for localities. The process has been simplified. This lesson demonstrates each of the four scenarios you might encounter for reporting your local taxes.

### **Verify 1099 Filing Information**

How can you ensure that the amount on the 1099 form for each vendor is correct? And what if you need to print 1099 forms by fiscal entity? How does the software allocate the amount paid to each vendor by entity? Find out which reports can help you reconcile these totals and what to do if they are incorrect. This lesson demonstrates the tools you can use to reconcile and correct 1099 totals by vendor or by prefix. This lesson is a must for anyone producing 1099s in Accounts Payable.

### **File Form 1099**

Take a guided tour through the process of generating the 1099 form, reviewing the form data, and printing and e-filing the forms in Accounts Payable. This lesson will help you become familiar with the Sage Aatrix Tax Forms and eFiling service, and show you how to file forms for a single payer or multiple payers, by prefix or by vendor. If you are responsible for filing 1099 returns, this lesson is for you.



## **File Form 1099-INT**

What steps should you complete before you print 1099-INT forms? How do you verify the interest amount paid on lease deposits, and correct amounts that are wrong? This lesson leads you step-by-step through the process of preparing for and producing 1099-INT Forms. You'll see how to generate the 1099-INT data, and review it, and how to print and e-file the forms. This lesson will benefit anyone responsible for filing 1099-INT returns in Property Management.

## **File Form 1098**

How do you prepare for filing 1098 Mortgage Interest statements? Where is the reportable information stored in Property Management, and how is it calculated? This lesson addresses these topics and guides you through the process of printing the 1098 forms, and creating a file that you can submit electronically. View this lesson if you are responsible for producing 1098 Mortgage Interest statements.

## **Generate State and Federal Quarterly Reports**

How do you prepare for filing quarterly reports, and then create them? This lesson leads you through each step of the process of generating your state and federal quarterly reports, printing them, and using the optional e-filing process. We'll show you how easy it is to keep up with changes to quarterly forms, and to complete forms using the Sage interface with Aatrix Tax Forms and e-Filing Service.

## **Canadian Forms**

### **Close Payroll and File T4 Slips**

What is the suggested order for updating the software, closing the payroll year, and generating your T4 forms? How do you close payroll? How do you file T4 forms? This lesson covers these topics and offers a step-by-step tour of creating, printing, and e-filing T4 forms. Anyone responsible for processing Canadian Payroll or producing T4 forms should view this lesson.

### **File T5018 Slips**

Do you need to report to the Canada Revenue Agency the payments made to subcontractors for construction services? Watch this lesson to find out how to set up vendors so that the correct information is generated for the T-5018 slips and how to generate and electronically file the T-5018 Summary and the related slips. This lesson will benefit anyone responsible for reporting T5018 information.

## **General Ledger**

### **Prior Year Adjustments**

Your accounting team has just identified adjustments and entries for the fiscal year you recently closed. How can you enter and post these adjustments so that they affect your account records for the proper period and year? How do you ensure that these entries are closed to retained earnings? This lesson addresses the most common questions about prior-year adjustments. Anyone responsible for closing the fiscal year or recording prior-year adjustments in General Ledger will benefit from this lesson.

Questions? Contact our training information team at 877-724-3285 or [TrainingInfo.CRE@sage.com](mailto:TrainingInfo.CRE@sage.com)

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