Sage 300 People

Release Notes
26.4.3.5
November 2026

Sage

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1.0 New Features

1.1 EMP201 Integration

This release introduces direct integration with SARS, enabling the EMP201 to be submitted directly from the payroll system, removing the need to re-capture liabilities on eFiling. Employers must still make the corresponding EMP201 payment via eFiling.

When you choose to submit your EMP201 Return electronically via the Electronic Submission Service, key sections of the return are automatically prepopulated using information already available in your payroll system. This reduces duplicate capturing and helps improve accuracy and consistency.

The integration uses a secure Sage Service to send your PAYE, Skills Development Levy (SDL), Unemployment Insurance Fund (UIF) and Employment Tax Incentive (ETI) totals. You can review and complete the return in the online submission screens before submitting it to SARS.

Note:
While this integration enables direct electronic submission of your EMP201 to SARS, the employer remains responsible for ensuring that all information submitted is accurate, complete, and compliant before submission. The employer must also ensure that the submission has been successfully received and accepted on eFiling.

1.1.1 Prerequisites for Electronic Submission

- The correct Site Code must be completed on the 'About screen'.
- Tax Certificate Contact Person field must be completed for all South Africa Companies.
- User must have access to all the company rules before they are allowed to create a new Tax Monthly Total record or view an existing Tax Monthly Total record.
- Your company must be registered with SARS eFiling (registration is required for the integration).
- You need to activate Sage as the ISV (Independent Software Vendor) on the eFiling profile used for the submission:
    - Log into SARS eFiling and click Organisation.
    - Click ISV Activation.
    - Select Sage and click 'Activate' and SARS will provide a Login and Key.
    - You will need to input the Login Name, and Login Key, provided by SARSA when you submit your EMP201 electronically.

1.1.2 Submission Process

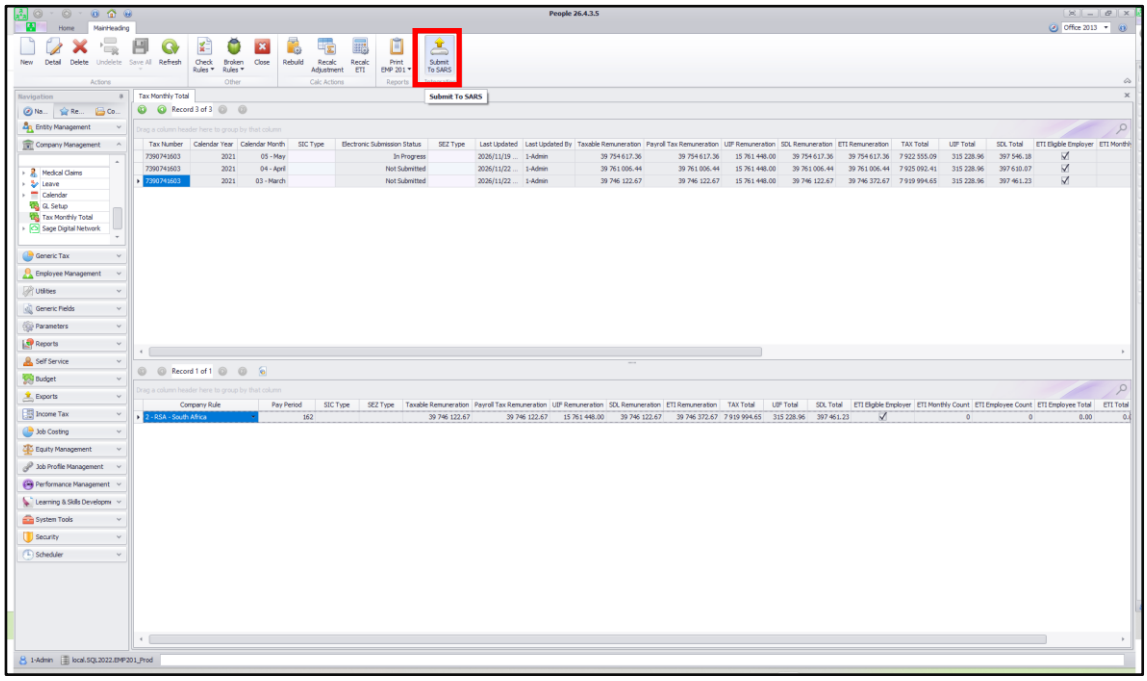
You may submit the EMP201 for any month on the Tax Monthly Total Screen, even for previous months, if not previously submitted to SARS on eFiling. There is a built-in check to prevent submitting the same month again after a successful submission.

Note:
Only one submission per month is allowed (per PAYE Number) when using the EMP201 Submission integration. No re-submissions are allowed through the integration after a successful submission. If you need to make corrections and re-submit, you must do so via SARS eFiling.

To use this feature, on the Navigation Pane go to:

Expand	**Company Management**
Double-click on	**Tax Monthly Total**
Select	**Applicable Tax Number – Calendar Year and Month**
or	
Select	**New**

Once you have selected the applicable tax number and period you would like to submit, click on the 'Submit To SARS' button.



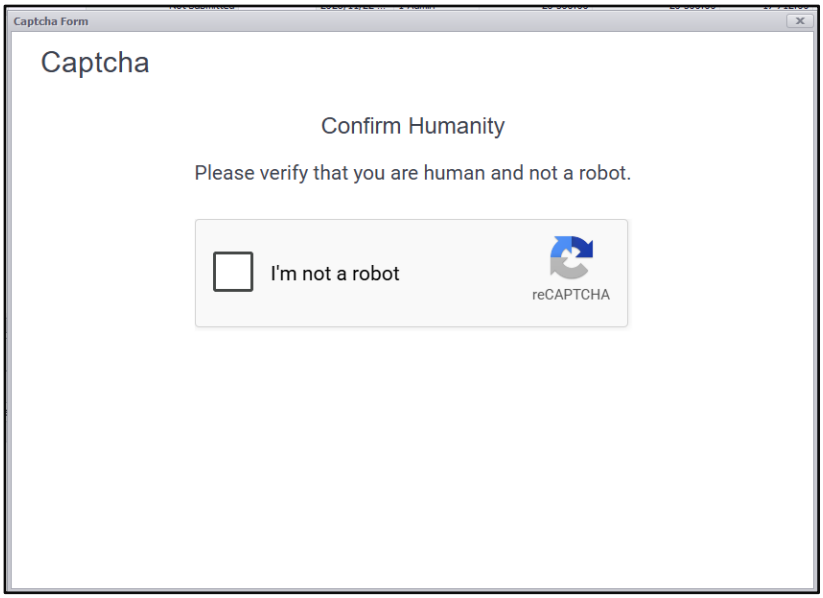
Note:
The EMP201 Electronic Submission will be stopped if one or more Tax Total values are negative. User will receive an error message and will need submit manually to SARS using the standard eFiling Service.

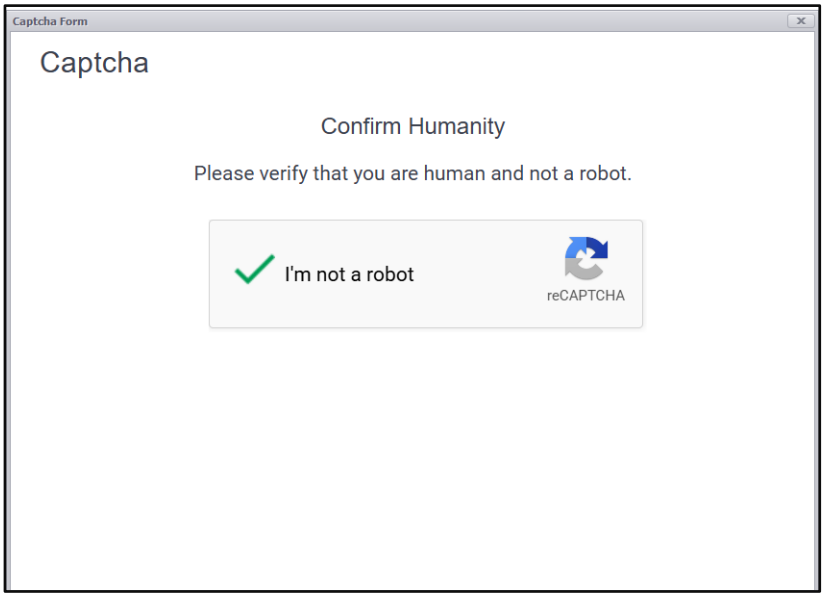
You can still print your EMP201 Detail and Summary report for the Tax Monthly Total record. The same values will be used to submit to SARS electronically. If you do so, you must manually submit the return to SARS using the standard SARS eFiling Service.

Note:
Ensure that the PAYE reference number is correct and that all relevant Company Rules for the

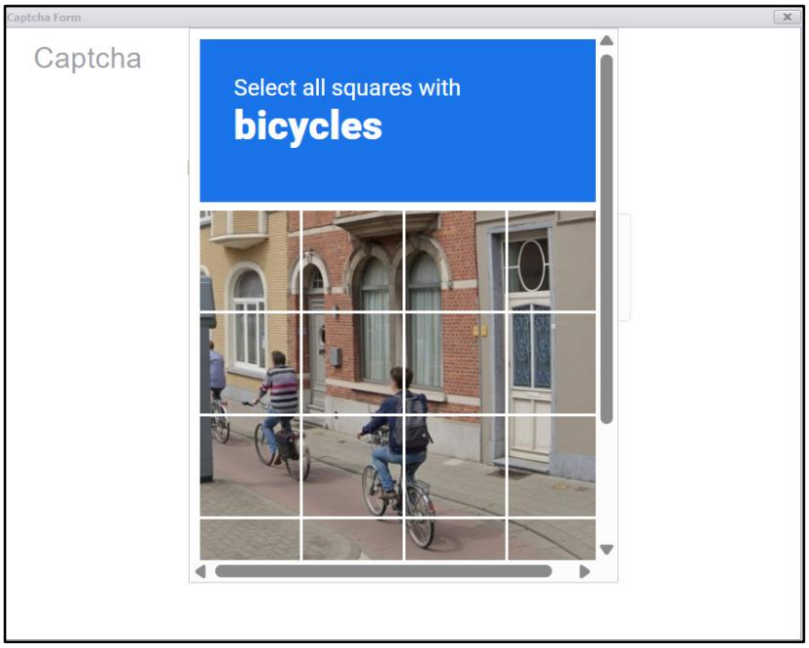
PAYE reference number is included. Before selecting Submit To SARS, ensure that the Site Code is correct and that the contact details for the entity linked to Tax Certificate Contact Person are complete and correct in Sage 300 People.

For desktop users, the Sage Submission Service uses your Site Code to authenticate your installation. The CAPTCHA screen appears the first time you use EMP201 Electronic Submission. Once you successfully complete the CAPTCHA verification, there is no need to repeat this step for subsequent submissions.

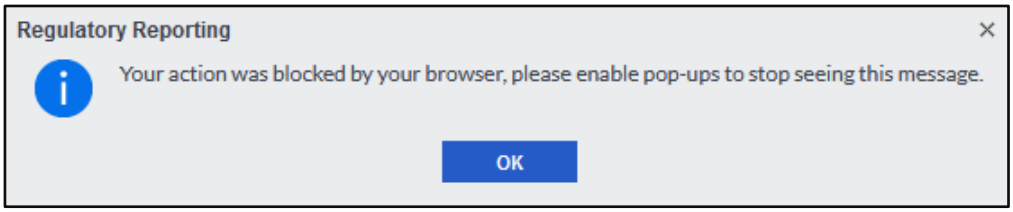




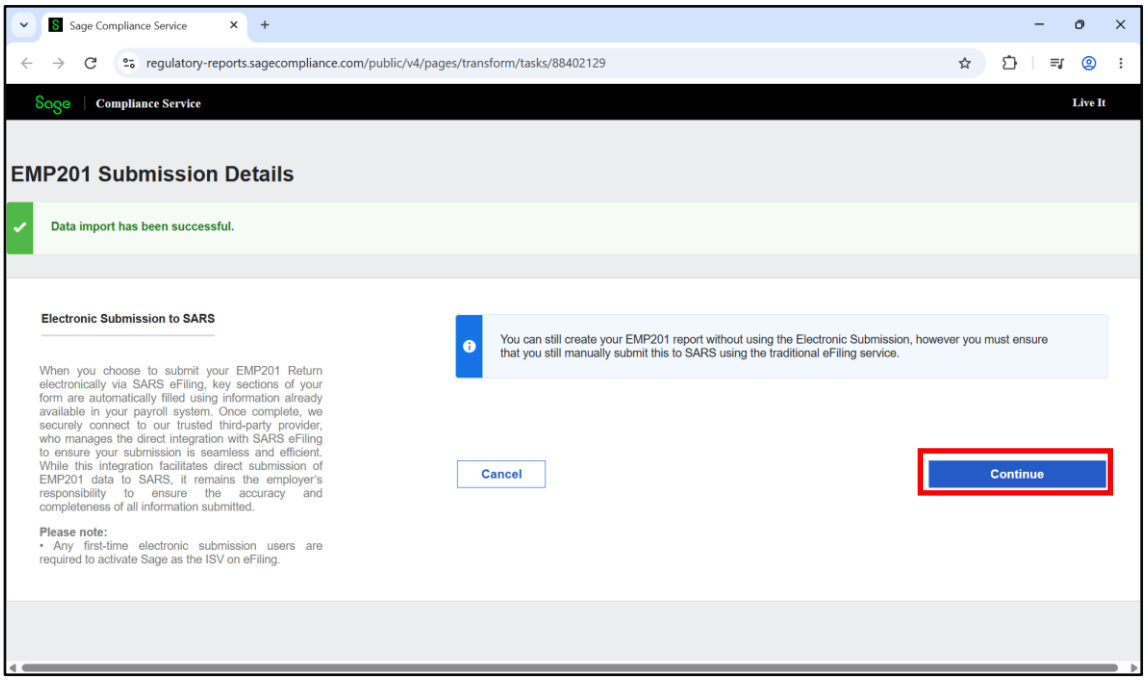
Follow the on-screen instructions to complete the CAPTCHA verification.



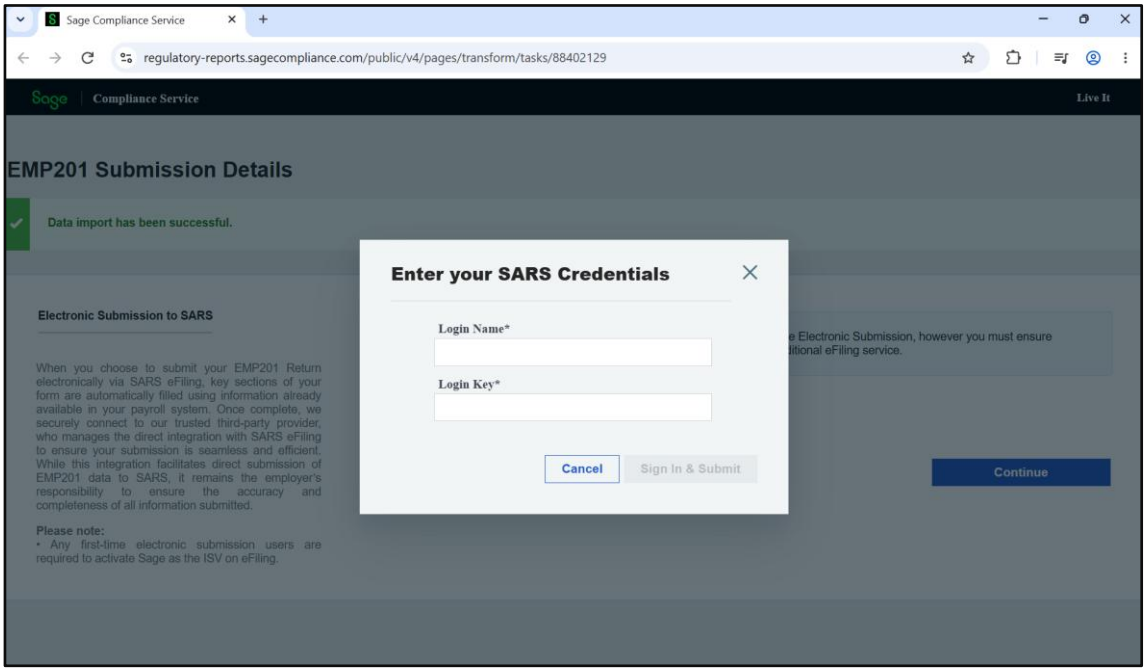
You might receive a message similar to the message below. Please note, Pop ups need to be enabled else you will get this message every time.



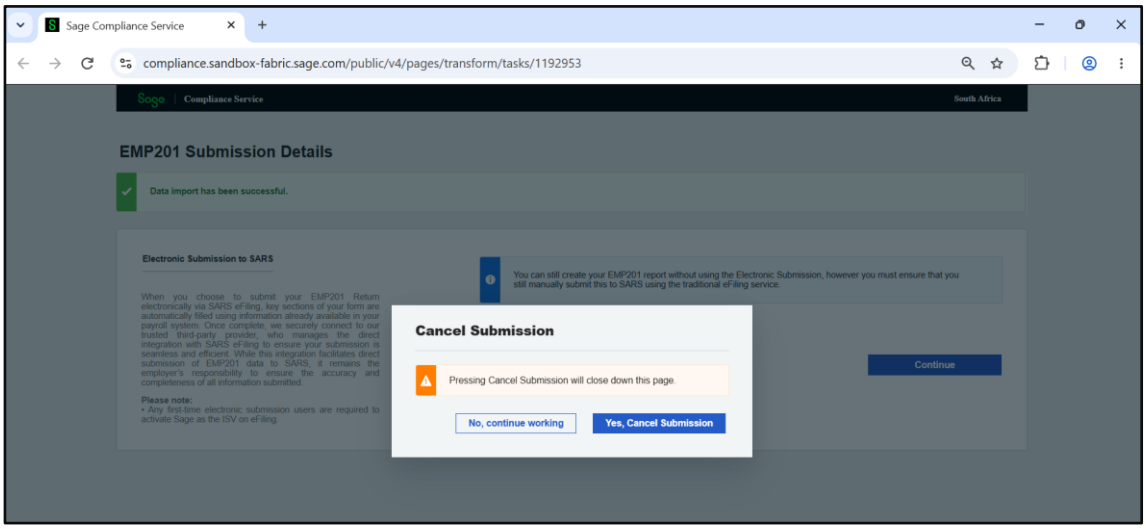
The website will automatically open in your default browser.



Click on the Continue button.

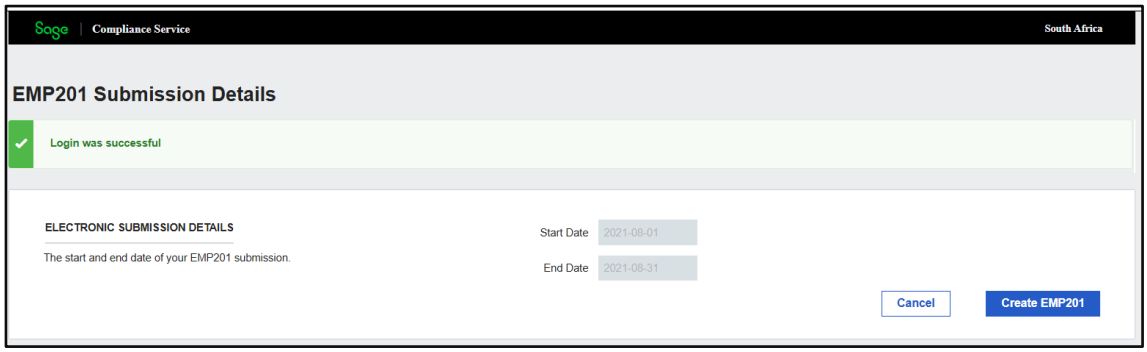


Complete the Login Name and Login Key, with the details SARS issued when you activated Sage as an ISV on eFiling.



You can cancel the submission process at any stage and continue later. To resume, select Submit To SARS. The system will return you to the last page or last step.

Confirm that you are submitting the EMP201 for the correct period.

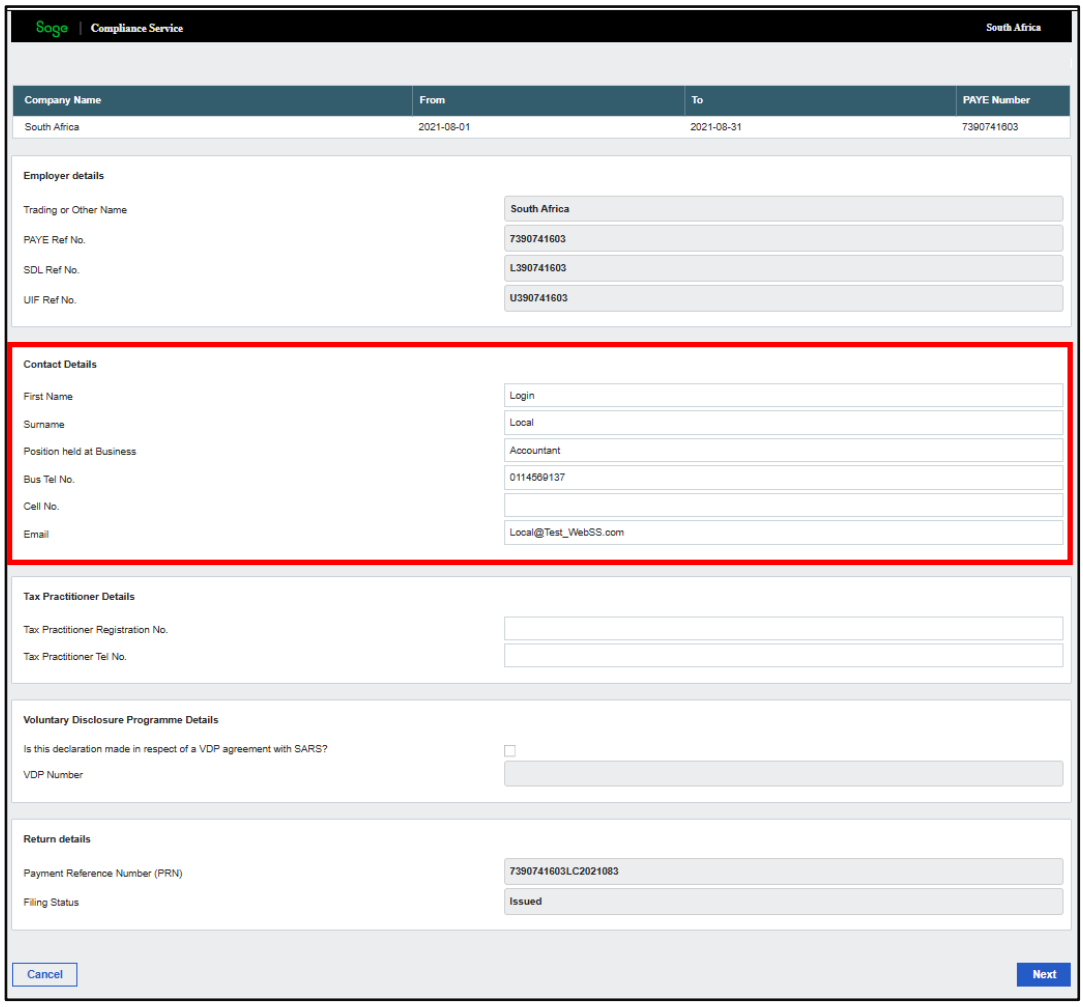


Click on the Create EMP201 button.

The EMP201 is returned by SARS with key sections automatically prepopulated using information from Sage 300 People and SARS.

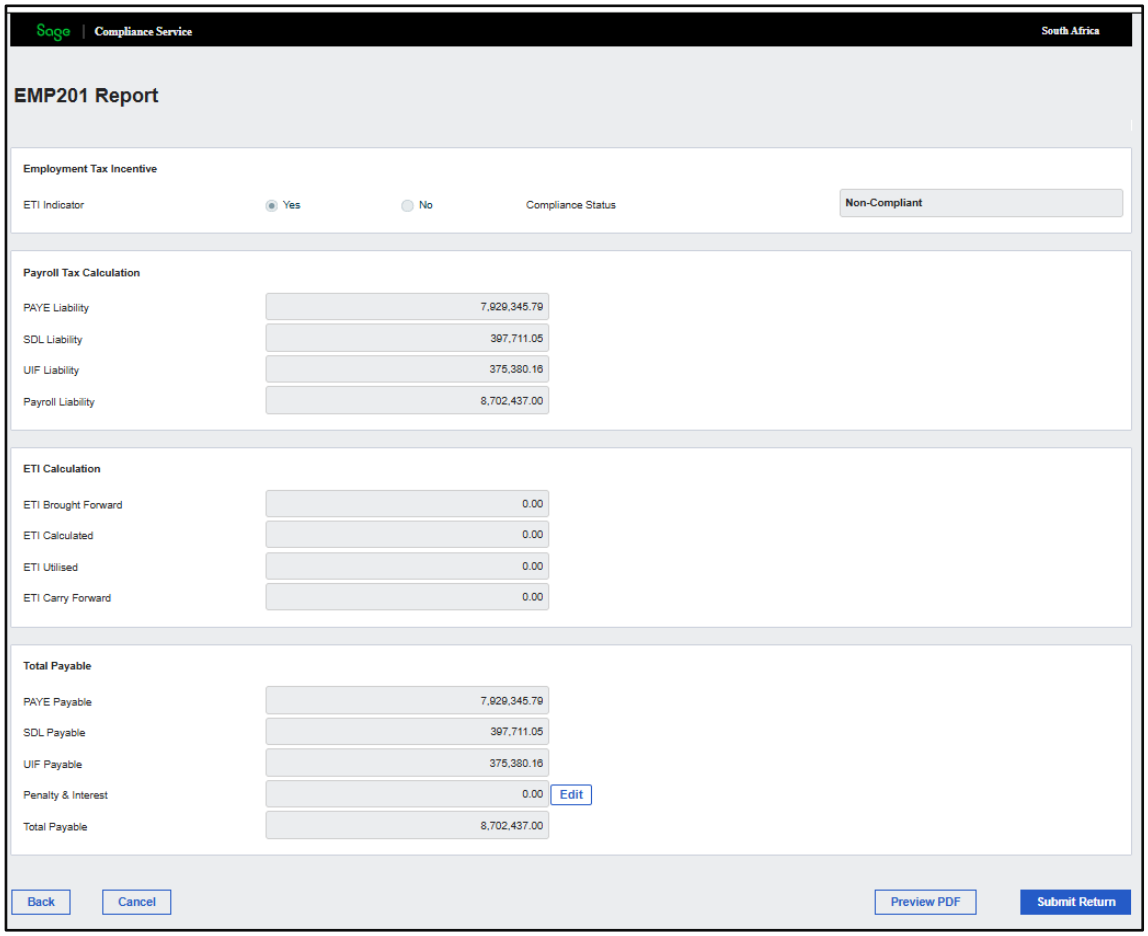
The Contact Details section in the Compliance Service is populated from the Entity selected as the Tax Certificate Contact Person on the Company screen. You can amend these details on the Compliance Service submission screen.

To avoid capturing contact details for each electronic submission, ensure that all contact information is completed on the linked Entity record.



Field	Detail
Enabled Fields	You may make amendments in all enabled fields.
Contact Details	This information will not pull through to eFiling.
Tax Practitioner Details	This information is not available in payroll, therefore you must enter the details here, if applicable to you.
Voluntary Disclosure Programme Details	Select (tick) “Yes” if you have a VDP agreement with SARS and enter the VDP Number.
Cancel	Click on Cancel to exit the electronic submission process.
Next	Click on Next to access the totals submitted:

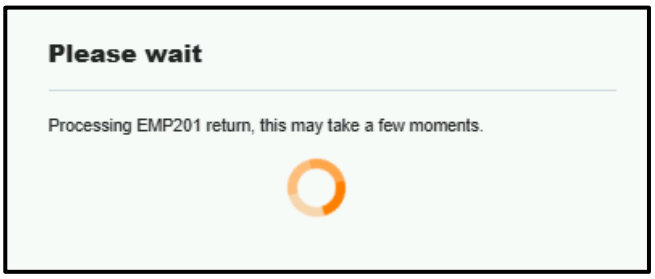
The imported totals cannot be edited, helping to prevent errors and ensure accuracy.



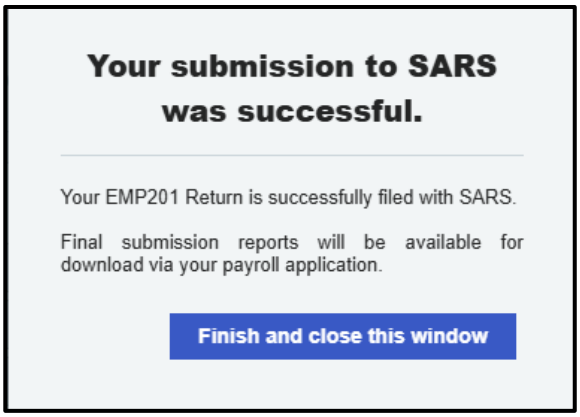
Field	Detail
ETI Indicator	The default is “Yes” but you can select “No”. If you Compliance Status is Non-Compliant “No” cannot be amended.
Compliant/Non-Compliant	This is returned from SARS and cannot be amended by you.
ETI Brought Forward	This value will be returned by SARS and cannot be amended by you.

Penalty & Interest	Click on Edit to enter the necessary value.
Back	Click on Back to return to the previous screen.
Cancel	Click on Cancel to exit the electronic submission process.
Preview PDF	**Please Note:** Click on Preview PDF to view the final submission details and values that will be submitted to SARS before you Submit. This version will have a watermark of “DRAFT”.
Submit Return	Click on Submit Return to complete the submission process.

When you click on the Submit Return button, the following message will display:



When the submission is completed, the following message will be displayed:



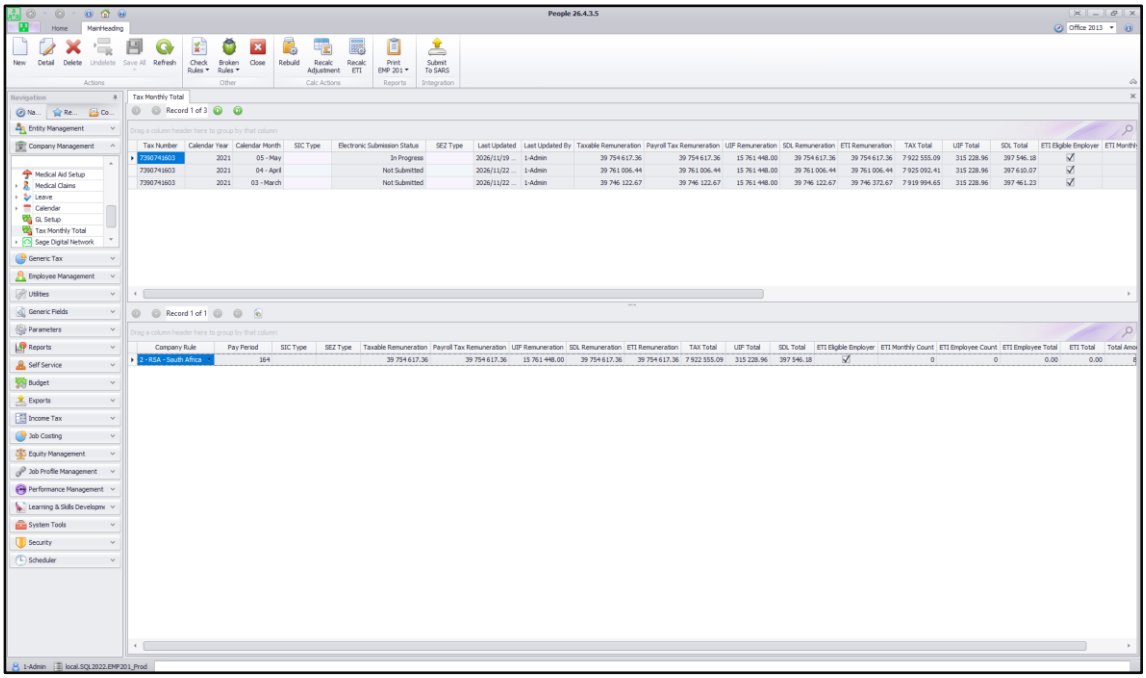
Click on the Finish and close this window button, to acknowledge the completion of this process.

1.1.3 Back to Tax Monthly Total screen

The Electronic Submission Status column on the Tax Monthly Totals screen indicates the progress of your EMP201 submission:

- Not Submitted – The electronic submission process has not yet started.
- In Progress – The submission process has started but has not yet been confirmed as completed in Sage 300 People.
- Completed – The submission process has been completed and confirmed.

Note:
After completing the submission process, select the relevant Tax Monthly Totals record and click Submit to SARS again to refresh the status to Completed.



You can cancel the submission process at any stage and continue later. The Electronic Submission Status of the applicable Tax Monthly Totals record will update and display In Progress. To resume, select the record and click Submit to SARS. The system will return you to the last page or last step you previously reached.

When a Tax Monthly Totals record is rebuilt or deleted and recreated to reflect changes in payroll values, its Electronic Submission Status resets to Not Submitted. A new Compliance Service session starts when you next select Submit to SARS.

Note:
If you delete and recreate a Tax Monthly Totals record, you must rebuild and save the new record before selecting Submit to SARS.

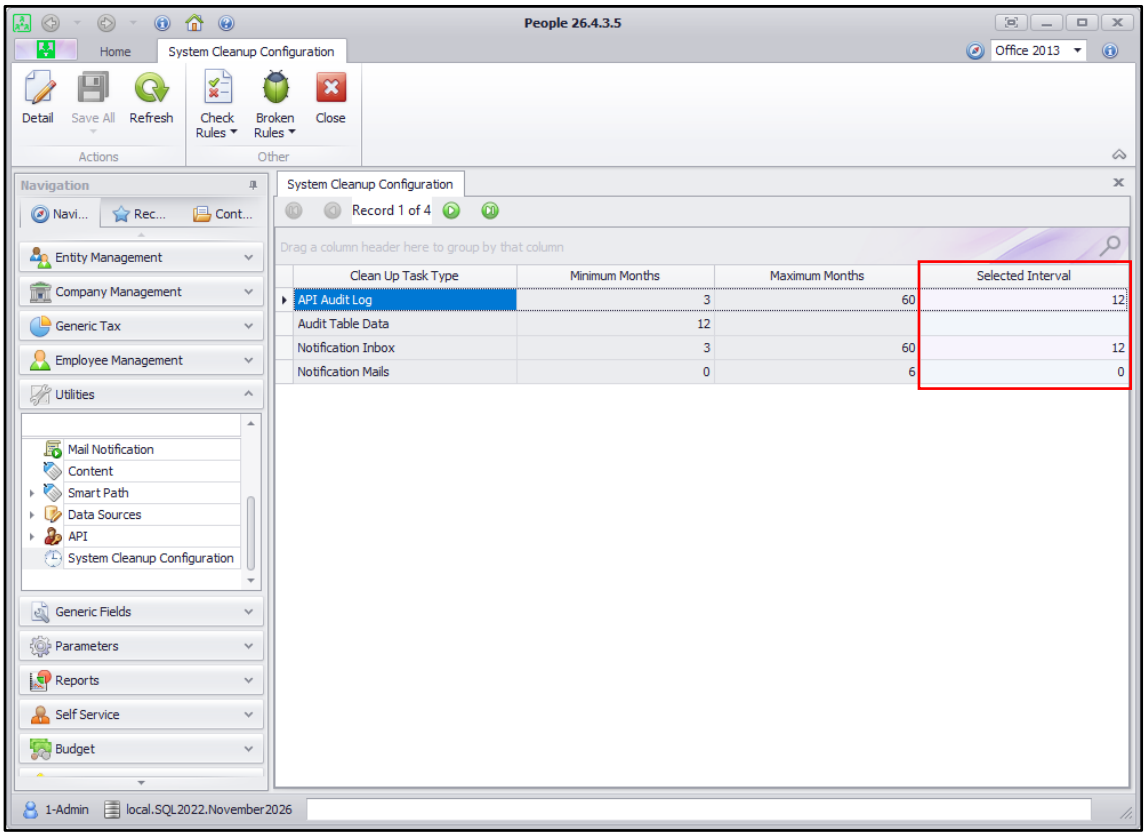
Sage 300 People allows you to create a Payment Run Definition specifically for tax payments under Company Management. Refer to the support Knowledge Base article:
Create a tax payment run definition

1.2 System Cleanup Configuration Functionality

Sage 300 People now includes automatic cleanup of older notifications and system history. This helps manage the amount of stored information and supports system performance. You can choose how long certain information is kept suiting your organisation's needs. The system then removes information older than your chosen period when the scheduled cleanup runs.

To review your settings, on the Navigation Pane go to:

Expand	**Utilities**
Double-click on	**System Cleanup Configuration**



Access depends on your security permissions.

The Selected Interval is the number of months you want to keep information. For example, selecting 12 means information older than 12 months becomes eligible for deletion during cleanup.

What you need to do
Review each available task after upgrading. Check that the Selected Interval meets your organisation's reporting, support and recordkeeping requirements, then save your changes.

You can change the Selected Interval for the available tasks but cannot add or delete tasks.

Review these settings before the next scheduled cleanup. Reducing an interval makes older information eligible for deletion when cleanup next runs. Increasing it later will not restore information already deleted.

The cleanup tasks work as follows:

- **Notification Mails:** Removes successfully completed email notifications and their attachments after your chosen period. Select a whole number from 0 to 6 months. The default is 0, which means completed notifications and their attachments are removed at the next cleanup without being kept for additional months. If you need this history for follow-up

queries, choose a suitable period before cleanup runs. Notifications awaiting sending, marked for resending or showing an error are kept. This field cannot be left blank.
- **Notification Inbox:** Removes older notifications from employees' ESS notification inboxes, together with their linked content or attachments. Choose 3 to 60 months; the default is 12 months. The period is measured from the date the notification was sent. Items marked to never be deleted are kept.
- **API Audit Log:** Removes older records of information exchanged between Sage 300 People and connected applications. Choose 3 to 60 months; the default is 12 months. Consider how much history your support team may need when investigating queries.
- **Audit Table Data:** Removes older history of changes recorded in the system, based on the effective date of those changes. Enter 12 months or more or leave the Selected Interval blank to keep this history indefinitely. The default is blank. Deleted audit history will no longer be available in Audit Reports or Audit Details.

Some cleanup tasks have fixed periods and run automatically. They do not appear on the configuration screen and require no user action:

- **Sage Network Payslip Links:** Removes older Sage Network payslip linking records using a fixed 4-month period.
- **Sage Network Log:** Removes Sage Network activity log entries last changed more than 3 months ago.
- **Tax Pack Submission Audit:** Removes Tax Pack submission processing history older than 2 months, including the related processing steps.

The cleanup tasks run automatically through the Scheduler. The first cleanup starts approximately 30 seconds after the Scheduler is started, then runs every 24 hours, timed from the Scheduler's most recent start or restart. Restarting the Scheduler resets this timing.

Note:

Review and save your Selected Interval settings before starting or restarting the Scheduler so that cleanup uses the retention periods your organisation requires.

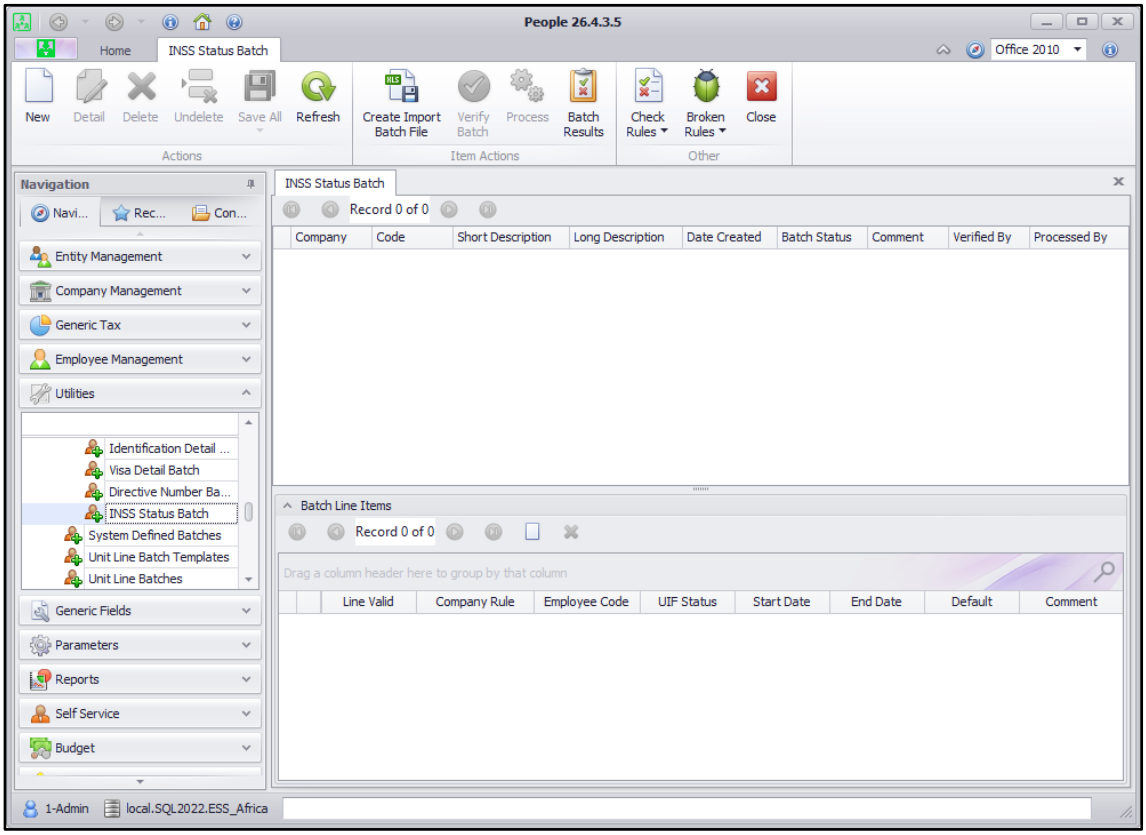
1.3 Mozambique Employee INSS Status Batch

Sage 300 People now includes an INSS Status Batch for Mozambique companies. This allows you to add INSS status records for several employees at once, saving time when capturing information such as short-time periods.

The batch updates each employee's Statutory Definition screen. This information supports the Mozambique INSS report when reporting the reason and number of days an employee worked less than 30 days in a month.

To use this feature, on the Navigation Pane go to:

Expand	**Utilities**
Expand	**Batches**
Expand	**System Batches**
Select	**INSS Status Batch**



You must have the necessary security access to create, verify and process batches:

- **Select the company and company rule:** The batch is available for Mozambique companies only. Select the company and company rule for the employees you want to update.
- **Prepare the employee information:** Use the Employee Code to identify each employee, then capture the applicable INSS status, start date, end date and Default setting. You can include several employees and more than one status period per employee in the same batch.
- **Check the dates and statuses:** Ensure that the information reflects each employee's circumstances. Status periods must not overlap, except for the ongoing default status. Only one status record per employee can be marked as the default, and this setting applies only to INSS or NOINSS.
- **Import and verify the batch:** The system checks the information for problems such as invalid employee codes, incorrect statuses, invalid dates or overlapping periods. Correct any reported errors and verify the batch again before processing.
- **Process and review:** Once verification is successful, process the batch to add the records to the employees' Statutory Definition screens. Records are arranged in date order. Review the updated information before generating your INSS report.

2.0 Product Updates

2.1 Revert Deletion of Notifications

The change that automatically deleted successfully sent email notifications and their attachments has been reverted. These records will now be removed by the Notification Mails cleanup task, according to the retention period selected under System Cleanup Configuration.

Previously deleted records and attachments will not be recovered or restored.

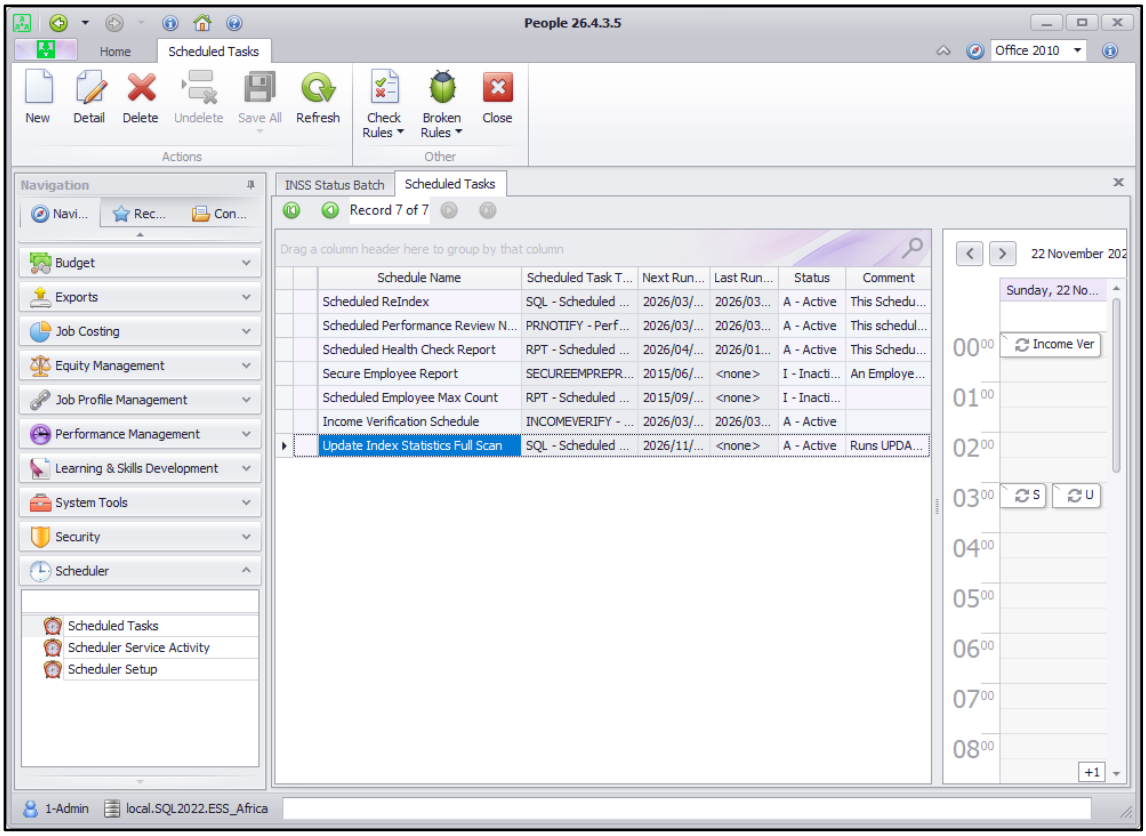
2.2 Scheduled Task for Update Index Statistics Full Scan

A new scheduled maintenance task, Update Index Statistics Full Scan, has been added to help improve ESS payslip preview and download speeds.

The task is automatically set to Active and scheduled to run daily at 03:00. Ensure the Scheduler is running so that this maintenance can take place.

To view this task, on the Navigation Pane go to:

Expand	**Scheduler**
Double-click on	**Scheduled Task**



2.3 ACB Bank File Processing Performance Optimization

ACB bank file processing has been improved to reduce the time needed to prepare payment exports, particularly for companies with large payment histories, multiple company rules and many pay runs.

The improvement applies automatically after upgrading. Continue processing your bank files as usual; payment information and file contents remain unchanged.

2.4 Parameterise Batch Header Queries

Scheduled payroll batch processing has been improved to make batch selection and the cleanup of older batch records more reliable. This covers standard batches, unit-line batches and multiple batches scheduled for processing.

The improvement applies automatically after upgrading. Continue working as usual; no changes to your existing batch settings or processing steps are required.

2.5 Payslip Alert Optimization

Payslip alert processing has been improved to reduce unnecessary checks during payroll calculations.

Alerts now refresh once after each employee's calculation completes successfully, helping improve performance, particularly for employees with multiple payslips or complex payroll setups.

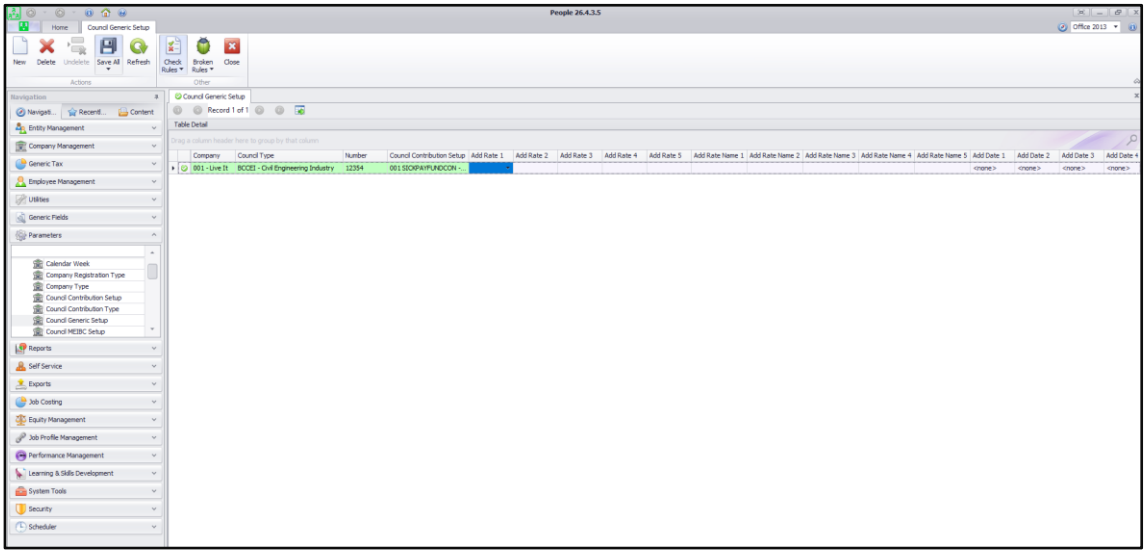
The improvement applies automatically to normal, bulk, early-pay and backdated calculations. Payroll results and alert rules remain unchanged, and no user action is required.

2.6 Council Type Civil Engineering Industry BCCEI

The Bargaining Council for the Civil Engineering Industry (BCCEI) has been added to the Council Type lookup list. Users can now select BCCEI when creating a council setup and link the applicable Company Rules and employees to this council.

To Link Council Type, on the Navigation Pane go to:

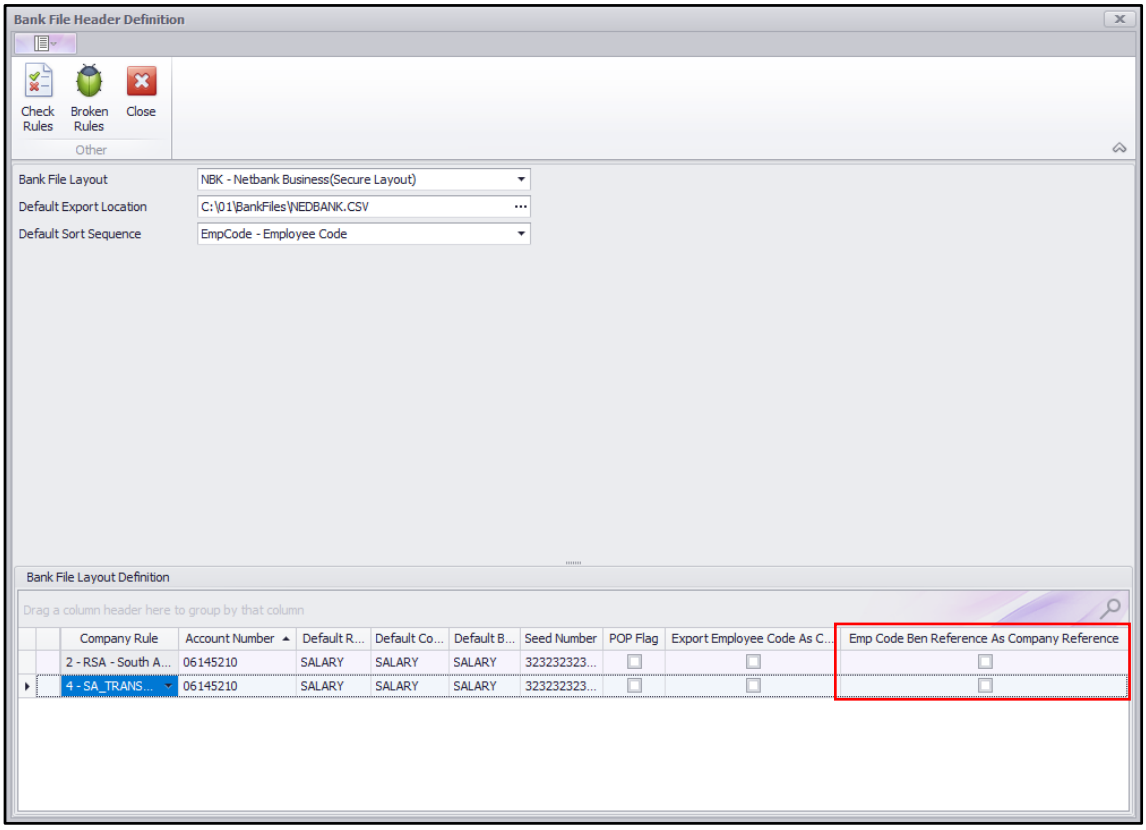
Expand	**Parameters**
Expand	**Company**
Double-click on	**Council Generic Setup**
Click on	**New**



2.7 Nedbank Business Secure Layout Company Reference

The Nedbank Business (Secure Layout) bank file now includes an option to combine the Beneficiary Reference and Employee Code as the Company Reference. For example, a reference of SALARY and employee code A001 will export as SALARY_A001, helping identify employee payments.

To use this, select Combine Beneficiary Reference and Employee Code for Company Reference on the Bank File Header Definition or Bank File Export Instance screen.



This option cannot be selected together with Export Employee Code as Company Reference.

References longer than 30 characters are shortened, and beneficiary payments continue to use the Default Company Reference.

2.8 Update API Token Expire

The Public API's Token was set to a fixed expiry time and could not be altered. It has been updated to use the configuration from the Self Service – Setup – Web Settings: API Key Timeout.

The selection made there will now determine the expiration of the Public API Token.

It is still recommended to keep the token expiration as short as possible to prevent any unwanted security exposure. The system will default to the current 12 hours and can be changed in 1-hour increments to a maximum of 2160 hours.

2.9 Employee Self Service User Interface Refresh – More New Look Screens

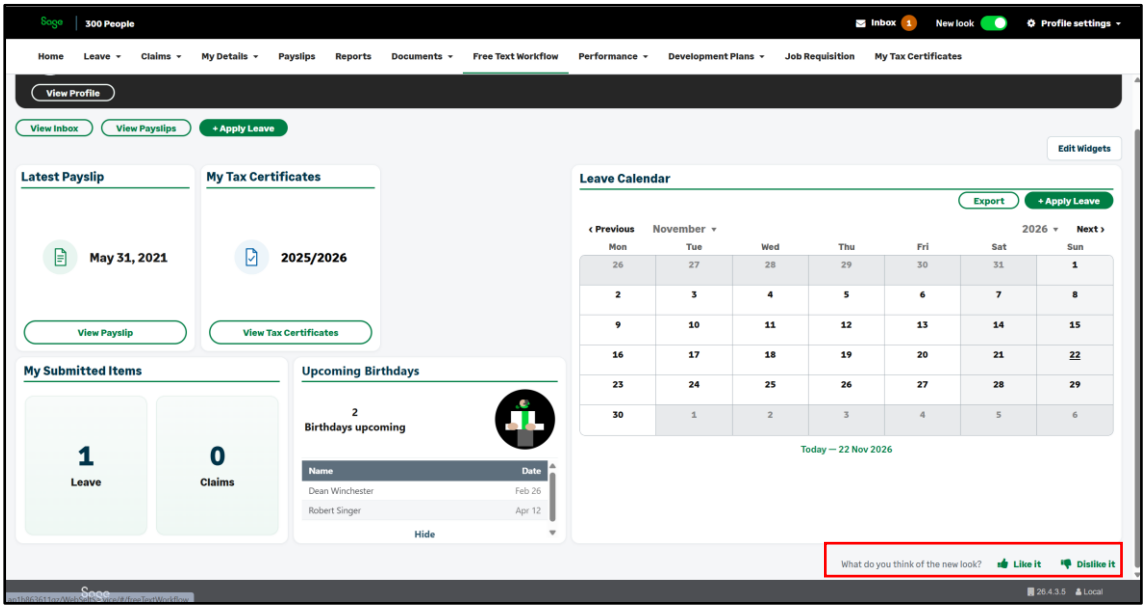
As part of the ongoing enhancement of the Employee Self Service (ESS) experience, additional screens now feature the refreshed design, improving usability, navigation and visual consistency while maintaining existing functionality.

The rollout continues in phases. In this release, the refreshed design has been extended to the following ESS areas:

- Documents – My Documents
- Documents - Company Documents
- My Details – Personal Details
- My Details – Bank Details
- My Details – Drivers Licences
- My Tax Certificates
- Job Requisitions

Users can switch between the classic and refreshed ESS experience using the interface toggle. The refreshed interface is enabled by default for users accessing ESS for the first time, while the classic interface remains available during the transition.

The feedback option in the refreshed ESS experience has been reset, allowing users to share their views again on the new-look screens. Users can indicate whether they like or dislike the interface, add comments, or select *Tell Us More* to provide detailed suggestions. Feedback received will help guide future enhancements to the ESS user interface.



2.10 Knowledgebase Chatbot

The existing Knowledgebase link has been updated to direct users to the Sage 300 People Support Chatbot

2.11 Security and Platform Handling

This release includes a series of security and platform-hardening enhancements implemented as part of our ongoing secure development and vulnerability management practices. These updates strengthen data protection, access controls, secure communications, third-party component security, and the consistent enforcement of user permissions across the application.

To protect the security of our customers and the platform, detailed information about individual security improvements is not disclosed in the release notes.

2.12 Bug Fixes

2.12.1 Ghana Backdated Adjustment Error Correction

An error that prevented backdated adjustments from completing when a company rule included archived employees has been corrected. Backdating now handles archived employees without current pay periods and continues processing the applicable employees.

This fix was previously released as a patch and is now included in the system release. No separate patch installation is required after upgrading.

2.12.2 DRC Net Up Error Correction

An error that prevented Net Up salary calculations from completing for DRC employees paid in USD when using high exchange rates has been corrected. The system now calculates the tax needed to achieve the employee's specified net pay without generating an error.

The correction applies automatically after upgrading.

Note:

For Net Up calculations, tax is not rounded so that the required net pay amount can be maintained.

2.12.3 Total Gender on Workplace Skills Plan

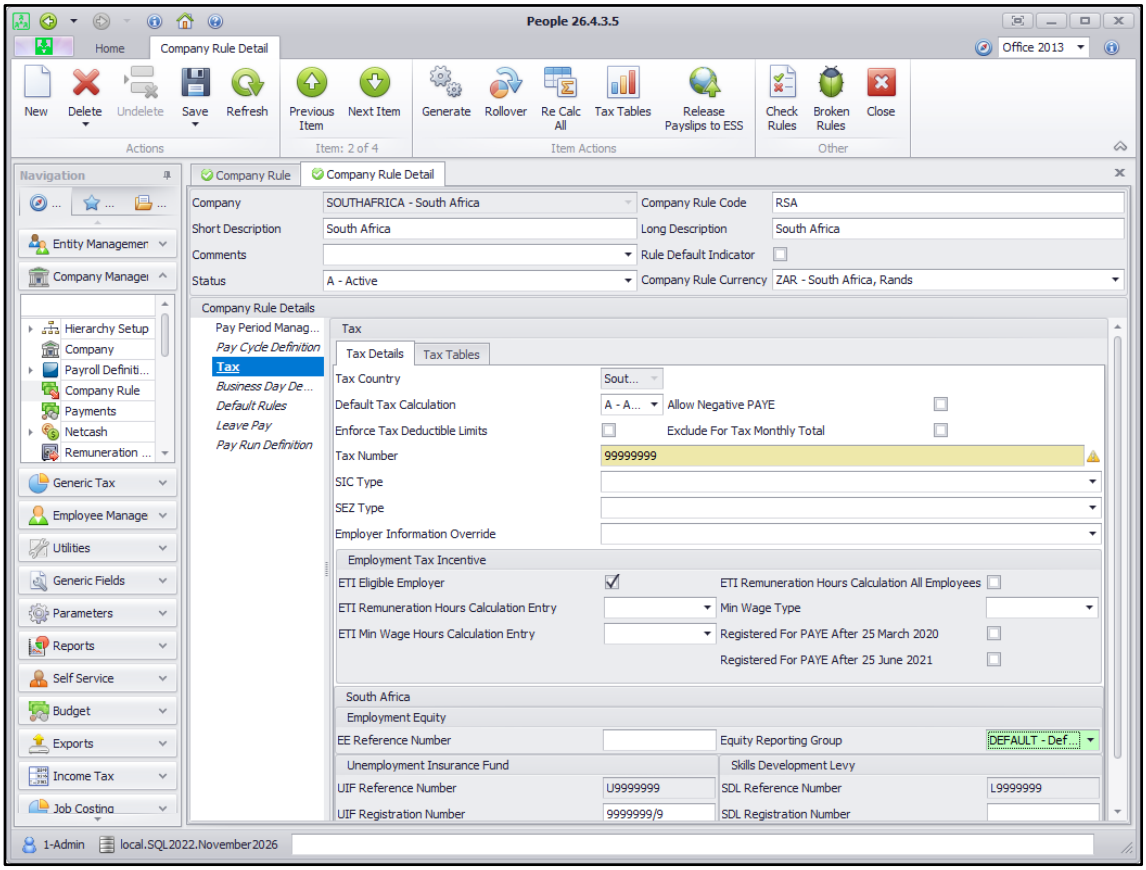
The Show Total per Gender and Show Gender Variance to Actual fields were intended for Equity Plans and Equity Consolidated Plans but were also incorrectly displayed on Workplace Skills Plans and Workplace Skills Consolidated Plans. This has been corrected, and the fields have been removed from both Workplace Skills plan types. They remain available on Equity Plans and Equity Consolidated Plans.

2.12.4 No Default Equity Group Error Message

The error message displayed when adding a new employee without an Equity Reporting Group linked to the company rule has been improved. It now clearly states: “Equity Reporting Group on Company Rule is incomplete.”

To resolve the error, on the Navigation Pane go to:

Expand	**Company Management**
Double-click on	**Company Rule**
Select	**Applicable Company Rule**
Select	**Tax Screen on Company Rule Details**
Select & Save	**The appropriate Equity Reporting Group**



2.12.5 Reports

Staff Complement Report
When printing the Staff Complement Report using Date Engaged, reinstated employees were incorrectly counted twice, resulting in an incorrect Balance Carried Forward count. This has been corrected to prevent reinstated employees from being counted twice.

Employee 12 Month Report
An error occurred when users with restricted company rule access previewed or printed the Employee 12 Month Report. This issue has been resolved, allowing affected users to run the report without changing their security permissions.

Hierarchy Summary Report History Periods
When filtering the Hierarchy Summary Report for non-monthly history periods, month-to-date values were printed instead of the actual period's values. This issue has been resolved.

Hierarchy Summary Report Saved Filters
An issue where Company Rule security was not applied when printing the Hierarchy Summary Report using saved filters has been resolved.

Employee Auto Archive Report
Auto-archived employees in non-RSA companies were excluded from the Employee Auto Archive Report when their title had not been completed. This issue has been resolved.

Health Check Report
An error occurred when printing the Health Check Report from All Reports or running it as a scheduled task on MCS. This issue has been resolved, and the report can now be printed and scheduled successfully.

2.12.6 Description on Staff Requisition Position Search

Enhanced the Position lookup on People-Online Staff Requisitions and Self-Service Job Requisitions to support filtering by Description. Users can now search for positions by position Description, making it faster and easier to locate the correct position during the requisition process.

2.12.7 API

Job Costing Cost Centre Split
An intermittent issue where the Job Costing API did not apply the cost centre split to a 100% Job Costing transaction has been resolved. The changes made are only applicable to the current pay period and will not change any historical data.

A recalculation on all employees before running any API is recommended to ensure that the Payslip data is correctly updated to the required Job Costing and Costing details.

Retrieve Payslip PDF API
The Retrieve Payslip PDF API returned a blank PDF when using the Security Payslip layout. This issue has been resolved.

Note:

PDF generation for Job Costing payslip layouts may take slightly longer due to additional system rules and checks.

2.12.8 Employee Self Service Payslips

Payslip access
In some instances, employees could be shown a payslip belonging to another employee. This issue has been resolved, and the fix previously provided as a patch is now included in the system release.

2.12.9 Employee Self Service Claims

Group Claims Payslip Error
Self Service grouped claims allowed notes longer than 120 characters, causing an error during payslip processing. This issue has been resolved by limiting note input to 120 characters.

Group Claims Attachments
Attachments linked to grouped claims were not visible to submitters and approvers when applying the new look for Self Service. This issue has been resolved, allowing users to view and download these attachments.

Claims Error Message Not Viewable
A blank error message could appear when employees with no Nationality Country captured accessed or submitted ESS claims. This issue has been resolved, allowing affected employees to access and submit claims without the blank error message.

2.12.10 Employee Self Service Leave and Workflow

Missing Leave Payout Rate Administration Option
The Show Payout Rate Administration option was missing from the leave approval screen when applying the new look for Self Service. This issue has been resolved, allowing approvers to view the payout rate and override units when reviewing leave requests.

Approval History
An error occurred when viewing the approval history of leave requests where a workflow step had been reassigned. This issue has been resolved in both the original and refreshed Employee Self Service interfaces.

2.12.11 Employee Self Service Dashboard

Half Day Leave

Half-day leave was displayed as a full day on the ESS calendar. This issue has been resolved in the refreshed ESS interface, where half-day leave now displays correctly.

Upcoming Birthdays

Lowercase “i” characters appeared as lowercase “l” characters in the Upcoming Birthdays widget, affecting the readability of headings and employee names. This display issue has been resolved, and the characters now display correctly.

2.12.12 Performance Management

Employee Ratings
An issue where managers could not view employee ratings on Performance Reviews has been resolved.

Mandatory Items in Performance Setup
An incorrect validation error occurred in Performance Setup when all fields were marked as mandatory at Area or Indicator level after the setup had been linked to a performance template in Employee Self Service. This issue has been resolved.

Employee Self Service Impersonator Review Access Corrected
Users acting as impersonators could access restricted employee reviews through a direct URL. This issue has been resolved, and users without the required access are now redirected to the Home page.

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