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Last Updated: November 18, 2020

Enhancement Legend

<BLANK>	Available on all systems (ViewpointOne, Hosted and On-prem)	
	Available on Hosted and ViewpointOne Systems Only	
	Available on ViewpointOne Systems Only	
	Top Suggestion Box Enhancement Log your enhancement ideas at https://vpspectrum.ideas.aha.io/	
	AP	Spectrum ePayments - Return File Import
	AP	Set Vendor to Spectrum ePayments
	AP	Form 1099-NEC & 1099-MISC <i>(Note: No changes for T5018 this year)</i>
	AP	Form 1099 Processing with Nelco
	AP	No TCC Required to Submit to Nelco
	AP	Electronic Filing Number Support for Nelco (i.e. IA BEN)
	AP	Purge Vendor Invoice Batch Utility
	AR	Select Applications to Bill Window Enhancement
	AR	Purge Customer Invoice Batch Utility
	CM	Add DI to Reconciliation Adjustment Entry
	DE	Add/Update Union Pay Rates
	DE	Add/Update Union Benefit Tier Overrides
	DE	Add/Update Wage Codes
	DI	Do Not Display Complex PDFs
	DI	Refresh Added to Images
	EC	Purge Unposted EC Transactions
	GL	Move Error Recover JE
	GL	Move Journal Entry Clear Flag
	JC	Refresh Added to Job Materials
	JC	Refresh Added to Job Subcontracts
	JC	Refresh Added to Job Images
	JC	PO Accrual Added to Reclassify History
	JC	Quantity History Report

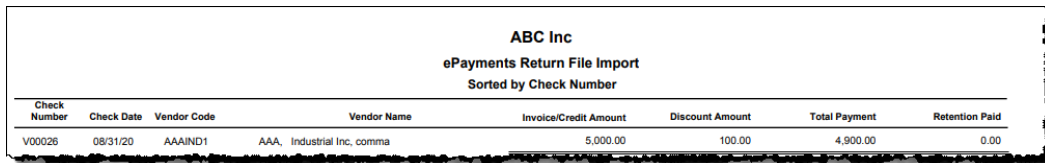
	JC	Purge Unposted JC Transactions
	IC	Purge Unposted IC Transactions
	PR	Time Off Code Listing in Crystal
	PR	Add Status Filter to Recurring Deductions / Add-ons
	PR	Tax Table Audit Log
	PR	SUTA Tax ID Number
	PR	Recap Totals on Wage and Tax Report
	PR	Form 1095-C Processing for Nelco
	PR	Print 1095-C's in same order as W-2's
	PR	W-2 Reporting for FFCRA/COVID wages
	PR	W-2 Processing for Nelco
	PR	Nelco to Use Employee Home Email Address
	PR	Foreign Address Support for Nelco
		State Tax ID Update for Nelco
	PR	Electronic Filing Number Support for Nelco (i.e. IA BEN)
	PR	T4 Reporting for COVID Wages
	PR	Save W-2/T4 Information to History
	PR	Non-standard Calendar Year
	PR	Streamlined Payroll Tax Table Import Workflow
	PR	Move PR Employee File Rebuild
	PR	Stronger Warnings Before Purging Data
	PR	Delete Employee from Current Company Utility
	PTE	Timecard Signature and Notes
	PTE	Job-to-Date Quantity in Unit Quantities
	SC	Additional Selections on Create Work Orders
	SC	Cost Group Selections on Contract Billing Processing
	SC	Cost Group Selections on Earned Revenue Processing
	SC	Cost Group Selections on Reverse Earned Revenue Processing
	STM	Materials Page Added
	STM	Purchase Orders Page Added
	SYS	Resources

AP Spectrum ePayments – Return File Import

Importing the ePayment Return File

The purpose of the return file is to explain how the payment was resolved with the vendor.

1. Download the Return File from Nvoicepay’s AP Gateway.
2. Navigate to **Accounts Payable | Data Entry | Import ePayments Return File**.
3. Click **Continue**, select and upload the file.
4. When records were successfully imported, the ePayments Return File Import, Sorted by Check Number report appears.

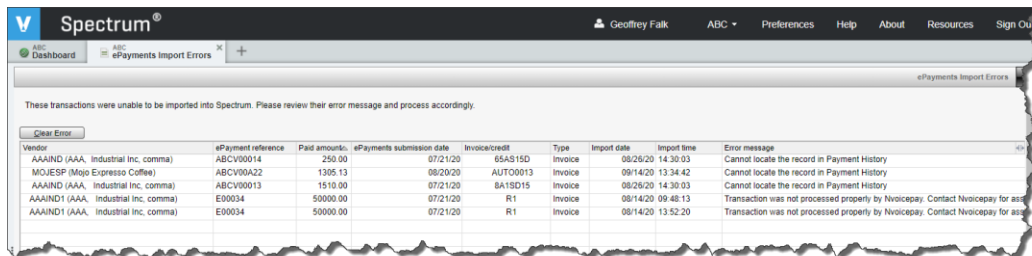


ABC Inc ePayments Return File Import Sorted by Check Number							
Check Number	Check Date	Vendor Code	Vendor Name	Invoice/Credit Amount	Discount Amount	Total Payment	Retention Paid
V00026	08/31/20	AAAIND1	AAA, Industrial Inc, comma	5,000.00	100.00	4,900.00	0.00

5. If errors were found, a warning message will appear stating how many records were invalid.

ePayment Return File Import Errors

Select Errors from the Import ePayments Return File screen. Records with issues appear here.



These transactions were unable to be imported into Spectrum. Please review their error message and process accordingly.

Vendor	ePayment reference	Paid amount	ePayments submission date	Invoice/credit	Type	Import date	Import time	Error message
AAAIND (AAA, Industrial Inc, comma)	ABCV00014	250.00	07/21/20	65A515D	Invoice	08/26/20	14:30:03	Cannot locate the record in Payment History
MOJESP (Mojo Espresso Coffee)	ABCV00A22	1305.13	08/20/20	AUTO0013	Invoice	09/14/20	13:34:42	Cannot locate the record in Payment History
AAAIND (AAA, Industrial Inc, comma)	ABCV00013	1510.00	07/21/20	8A19D15	Invoice	08/26/20	14:30:03	Cannot locate the record in Payment History
AAAIND1 (AAA, Industrial Inc, comma)	E00034	50000.00	07/21/20	R1	Invoice	08/14/20	09:48:13	Transaction was not processed properly by Nvoicepay. Contact Nvoicepay for assistance.
AAAIND1 (AAA, Industrial Inc, comma)	E00034	50000.00	07/21/20		Invoice	08/14/20	13:52:20	Transaction was not processed properly by Nvoicepay. Contact Nvoicepay for assistance.

Once the issue has been researched and resolved, click the **Clear Error** button to remove this from the screen.

Types of Error Messages

Wrong Company

The data in the return file is for another company. The return file is company specific and can only be imported into its company only.

Transaction was not processed properly by Nvoicepay.

The transaction is on hold or has some error on the AP Gateway. Contact Nvoicepay for further assistance.

Cannot locate the record in Payment History

The check number in Spectrum does not match that in the return file. This may also indicate that the transaction was not posted in Spectrum but was sent to Nvoicepay.

Vendor Payment History Inquiry

To assist the user in understanding how the payment to the vendor occurred, payment history now contains the following information:

1. 'ePayment disposition'
 - Displays how the transaction was paid. Will state Check, Electronic, Master Card or NVP Card.
- 'ePayment reference #'
 - This will contain the Spectrum company code + Nvoicepay transaction number
- 'ePayment disposition date'
 - The date the file was submitted to Nvoicepay for processing.

Invoice	Check	Refresh	Payment method	Cleared	ePayment disposition	ePayment reference #	ePayment submission date
			Check		Check	ABCV00026	09/02/20
			ePayment		Check	ABCV00026	09/02/20
			ePayment		Check	ABCV00020	08/14/20
			ePayment		NVP card	ABCV00014	07/21/20
			ePayment		Check	ABCV00013	07/21/20
			ePayment				

Subcontract Payment History Inquiry

The same columns were added to Subcontract Payment History as well.

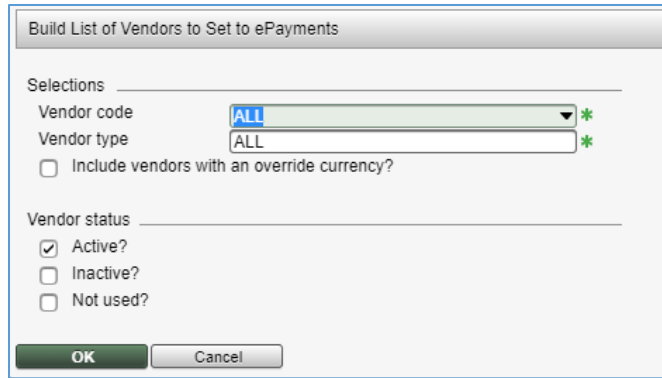
AP Set Vendor to ePayments

To assist users with implementing ePayments, a new utility has added that changes the payment type for selected vendors. As with changing the payment type manually to ePayments, there are certain data fields that must be completed first. Before changing the payment type to ePayments, the utility reviews the selected vendors and validates that the information exists. Specifically, the utility has the following requirements before it will change the payment type:

- Account reference is not blank
- Address 1, City, State and Zip are not blank
- Default payment location has Address 1, City, State and Zip

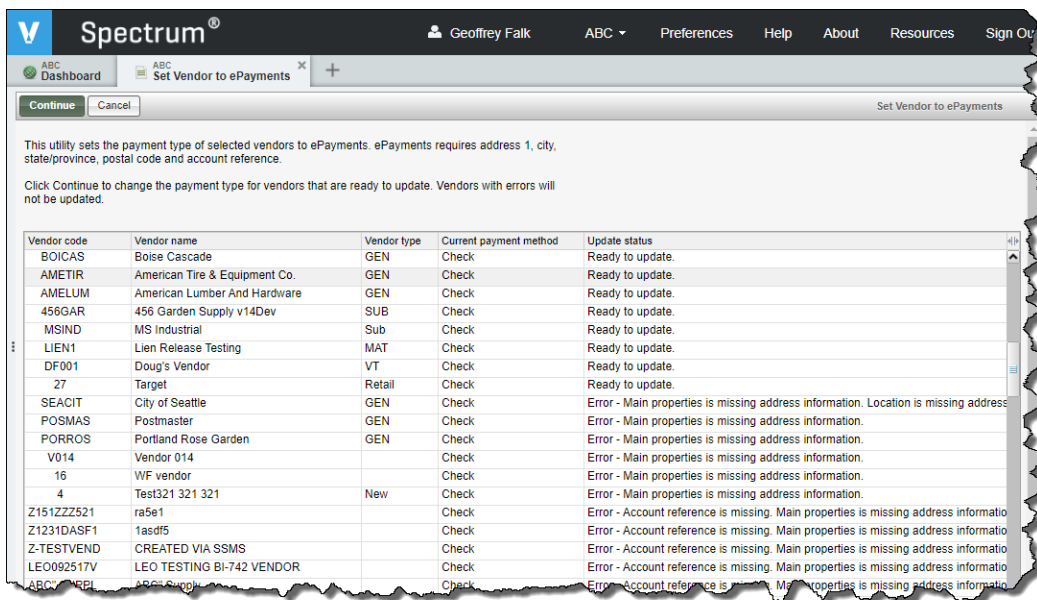
Here are the steps to use the utility:

1. Navigate to **Accounts Payable | Utilities | Set Vendor to ePayments** to start.
2. Complete the Build window to create the list of vendors to change. Click **Ok** to continue.



Multi-currency vendors: Based on your ePayments implementation, you may or may not want to change vendors that are paid in a different currency.

- The list of vendors will appear. Only vendors without errors may be updated.



- Click **Continue** and all vendors with the update status of 'Ready to update' will be set to ePayments.

AP T5018 Statement of Contract Payments

CANADA SYSTEMS ONLY

There were no changes to the form or electronic filing for the 2020 tax year.

AP Form 1099 Processing

UNITED STATES SYSTEMS ONLY

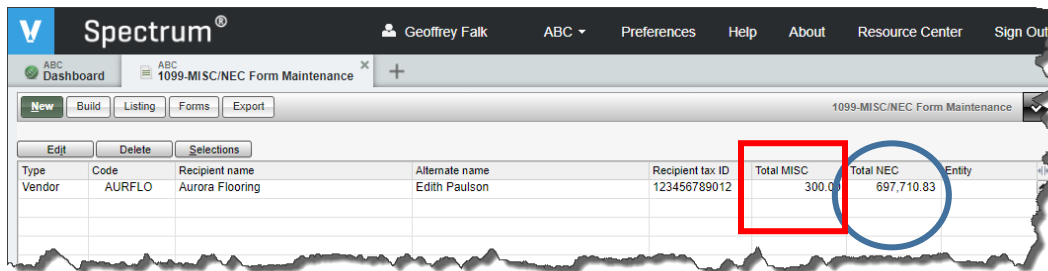
The IRS has released new versions of the 1099s for the 2020 tax year. Non-employee compensation has been moved out of the 1099-MISC and now is reported on Form 1099-NEC (**N**on-**E**mployee **C**ompensation).

IMPORTANT: No change is required on the vendor to use the new form. All vendors set with amount indicator '7 – Non-employee compensation' will automatically appear on Form 1099-NEC.

Form 1099-MISC has changed in 2020. This means that any leftover forms from prior years will not work this year!

1099-MISC/NEC Form Maintenance

The 1099 maintenance screen supports both Form 1099-MISC and Form 1099-NEC.



The listbox displays totals for Form 1099-MISC and Form 1099-NEC.

Form 1099-MISC/NEC Form Maintenance

1099 type: Vendor
Vendor code: AURFLO
Payer tax ID number: 123456789012
Vendor total: 698,010.83

Recipient:
Recipient name: Aurora Flooring
Alternate name: Edith Paulson
Address 1: 4508 454Th Street W.
Address 2:
City: Seattle
State: WA Zip: 98103

Recipient properties:
Federal ID #: 123456789012
Payer state code:
State/payer #:

Form 1099-MISC amount paid:
Rents: 100.00
Royalties: 200.00
Other income:
Fishing proceeds:
Med payments:
Int/div substitute:
Golden parachute:
Paid to attorney:

Form 1099-NEC amount paid:
Non-employee compensation: 697,710.83

FIT withheld:
SIT withheld:
 2nd TIN notice?
 Products for resale?

Form 1099-MISC:
Form 1099-NEC:
 2nd TIN notice?

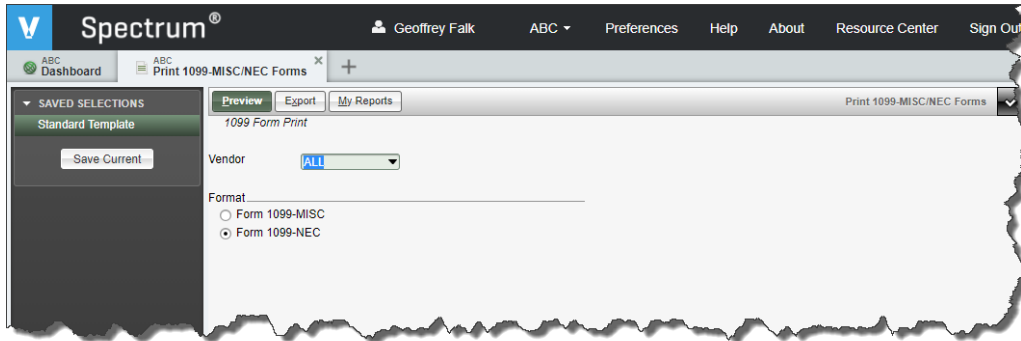
OK Cancel



Note that the 'Vendor total' includes the sum of Form 1099-MISC and Form 1099-NEC.

Print 1099-MISC/NEC Forms

Select the correct format to print on pre-printed forms. Only those records for the selected format will print. In other words, when Form 1099-NEC is selected, all 1099-MISC information will not print out.



Export 1099-MISC/NEC

The standard export will create two files for 1099's. The first file, IRSTAX_MISC, contains all 1099-MISC information. The second file, IRSTAX_NEC contains all 1099-NEC information. Note that when no 1099-MISC information exists, only one file will be created.

AP Form 1099 Processing with Nelco

This is a fee-based service.

Viewpoint has partnered with Nelco to provide an alternative solution to Federal and State e-filing. While many states use the federal electronic file format, there are some that do not. Nelco can be used to create these files in each state's preferred method.

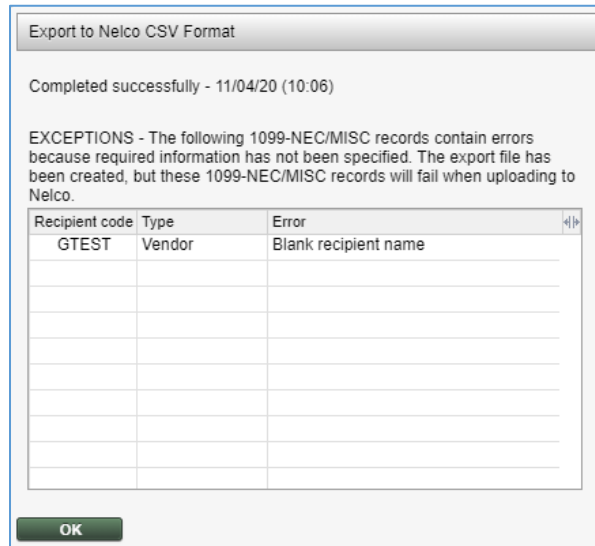


Here are the steps:

1. Navigate to **Accounts Payable | Period End | 1099 MISC/NEC Forms**.
2. Click **Export**.
3. Complete your company's information for the year.
4. Click **Nelco CSV**.
5. Click **Continue**.
6. Upload the file to Nelco for processing at <https://spectrum.nelcoportal.com/import/gwximport>

Errors

If errors were found during the export, a window will appear explaining the issue. When there is more than one error in a record, only the first error will display.



It is important to note that these error records are corrected prior to uploading the file to Nelco. Examples of errors include:

Blank Company Name	Blank Vendor Recipient Tax ID Number
Blank Company Address Line 1	Blank Vendor Recipient Name
Blank Company City	Blank Vendor Recipient Address Line 1
Blank Company State	Blank Vendor Recipient City
Blank Company Zip	Blank Vendor Recipient State
Blank Company Phone	Blank Vendor Recipient Zip

AP No TCC Required to Submit to Nelco

To streamline the process of filing 1099's with Nelco, the Transmitter Control Code (TCC) will no longer be required. In earlier versions, the user would receive an error message when creating the export file.

While you can still send your TCC information within the file, it is not an error.

AP Electronic Filing Number Support for Nelco

IOWA BUSINESS EFILE NUMBER (BEN)

When filing 1099's electronically with Nelco, the state of Iowa requires an additional electronic filing number. To support this Business eFile Number (aka 'BEN'), a new field titled 'Electronic filing #' has been added to the Export 1099-NEC/MISC File page.

The screenshot shows the 'Export 1099-NEC/MISC File' screen in the Spectrum software. The form is divided into several sections:

- Selections:** Year: 2020, Prior year data?, Set defaults?
- Transmitter info:** Transmitter's TCC: DECX, Transmitter's TIN: 12414, Foreign?, Transmitter's name: GoGG, Name (continued): Company ABC
- Contact info:** Contact name: ContactName, Name (continued): Name Continued, Street address: Address, City: City, State: WA, Zip: ZIP123, Contact person: Contact Person, Contact phone: 555, E-mail: 3a5@gmail.com
- Payer info:** Payer's TIN: 124124, Foreign?, Payer's name: Payer Name, Name (continued): Payer Name Cont, Street address: PAYER STREET, City: PAYER CITY, State: CA, Zip: 111111, Payer name control: A, **Electronic filing #: 07954321**

Electronic filing # is also known as Iowa's Business eFile Number (BEN).

IMPORTANT NOTES

- Leave this field <BLANK> when not needed.
- Iowa will not accept zeros in this field.
- Today, this field is used for Nelco's 1099 export.

AP Purge Vendor Batch Utility

! TOP SUGGESTION BOX REQUEST!

There are times when it is desirable to delete out a batch of unposted transactions. Clients using SDX report that they have imported too many transactions and they want to clear the batch and start over. This is a common question to the Support desk.

Enter the batch code to delete and then click **Continue**.

The screenshot shows the 'Purge Unposted Vendor Invoices' screen in the Spectrum software. A warning message is displayed:

WARNING! This update will delete a batch of unposted vendor invoices for the current company. If used inappropriately data loss will occur and will result in having to enter transactions once again into the system. There is no way to reverse this update once it is performed.

The 'Batch' dropdown menu is set to 'CBC' and the 'Unposted Batch: \$ 208.00 (27 Transactions)' is displayed.

Warning

This update will delete a batch of unposted vendor invoices for the current company. If used inappropriately, data loss will occur. This will result in having to enter transactions once again into the system. There is no option to reverse this update once it is performed.

Restrictions and Limitations

- This utility will not delete invoices that are currently locked or those that cannot be removed using the Delete option in Vendor Invoice Entry.
- This utility requires a level 8 or higher security to the AP security category.

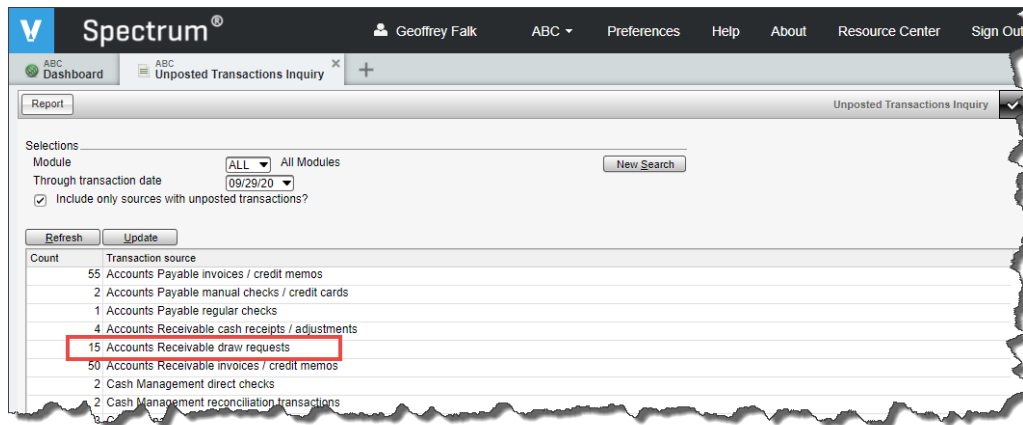
AR Select Applications to Bill Window

The Select Applications to Update window on the Update Draws to Invoice Entry screen has been enhanced to display the 'This period billing' amount.

In previous versions, this window only displayed draw requests with a 'Period to' (G/L date) entered. By adding 'This period billing' and the ability to resort by this amount, allows the user to identify all draws that are considered unposted over on the G/L Unposted Transactions Inquiry screen. Unposted applications include those with a 'Period to' (G/L date) and a non-zero amount in the 'This period billing' column.

Why is this such a big deal?

This is helpful when identifying unposted draw requests in the G/L Unposted Transactions Inquiry screen. Here, the screen states that there are 15 unposted draws.



Here are the steps to identify the unposted draw requests:

1. Highlight 'Accounts Receivable draw requests' and click **Update**.
2. A new Spectrum tab will open in Update Draws to Invoice Entry.
3. Press <ENTER> to accept the batch code.
4. Click **Select**.
5. Resort the window by 'This period billings'.
6. The items with a non-zero amount are considered unposted.

Select Applications to Update

Applications appear here when they have a 'period to' (G/L date) entered on them. Unposted applications include those with non-zero amounts in the 'this period billing' column.

Use Shift or Ctrl to select multiple.

Job	Customer	Appl #	G/L date	This period billing
300 (King County; Highw	KINCOU (King County Public Works Dept)	15	05/15/18	25,026,962.14
A321 (Avatax)	007COR (007 Bonding & Corporation)	1	01/25/19	85,555.00
325 (Nolan Ryan Bull Pe	RYANOL (Nolan Ryan)	5	12/12/13	50,000.00
A322 (asdfsdf)	007COR (007 Bonding & Corporation)	1	01/25/19	50,000.00
425 (Johnny Bench Corn	BRICOL (B.C. Dept of Transportation)	1	04/10/17	5,000.00
ASD (ASD Test)	FEDFRE (FedEx Freight)	1	01/25/19	5,000.00
1-0054 (Job 1-0054)	LAKCON (Lakeview Consortium)	1	05/06/13	1,225.00
125 (Cascadia Park West	GIADEV (Giant Development Corp.)	8	07/30/20	1,000.00
125 (Cascadia Park West	007COR (007 Bonding & Corporation)	1	07/15/18	600.00
325 (Nolan Ryan Bull Pe	007COR (007 Bonding & Corporation)	1	12/12/11	366.00
125 (Cascadia Park West	12345 (Geoff)	1	07/15/18	250.00
315 (Geoff's Treehouse)	007COR (007 Bonding & Corporation)	1	07/15/18	105.00
JOBBOY (Job EEEEEEE)	CITSEA (City of Seattle)	1	01/25/19	100.00
DF001 (Doug's Job)	DF001 (DF001)	5	06/25/19	12.00
1D (1D - Plan Room int	007COR (007 Bonding & Corporation)	1	04/10/17	10.00
200 (Kingdome Room Remo	SEALIB (Seattle Library System)	3	01/25/19	.00
350 (Waterfront Tower)	LAKCON (Lakeview Consortium)	7	01/30/15	.00
450 (One Season Hotel +	GIADEV (Giant Development Corp.)	1	05/18/18	.00
700 (Safeco Field Impro	MARPRO (Mariner Properties, Inc.)	1	11/19/13	.00
1-0154 (JV Test Job 02)	ABC987 (ABC 987 Customer)	1	02/02/16	.00
AVATAx (Avatax Testing)	007COR (007 Bonding & Corporation)	3	01/25/19	.00
300-002 (HVAC Updates)	KINCOU (King County Public Works Dept)	1	08/31/15	.00
565-100 (Testing)	007COR (007 Bonding & Corporation)	1	07/15/18	.00

OK Cancel

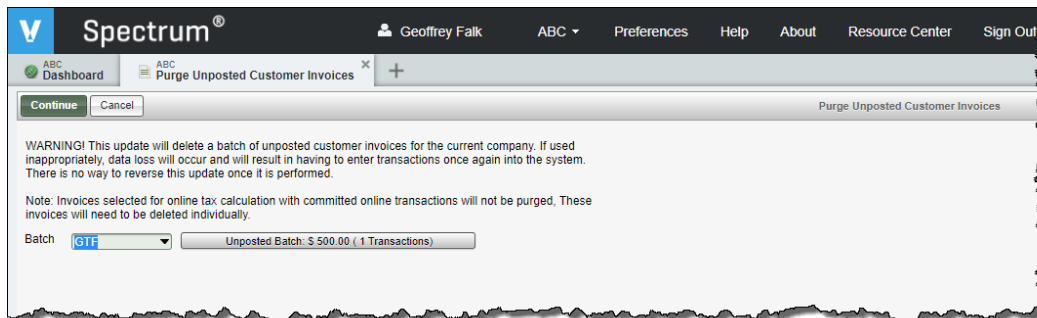
The 15 unposted draws are listed here with non-zero this period billings.

AR Purge Customer Invoices Batch Utility

! TOP SUGGESTION BOX REQUEST!

There are times when it is desirable to delete out a batch of unposted transactions. Clients using SDX report that they have imported too many transactions and they want to clear the batch and start over. This is a common question to the Support desk.

Enter the batch code to delete and then click **Continue**.



Warning

This update will delete a batch of unposted customer invoices for the current company. If used inappropriately, data loss will occur. This will result in having to enter transactions once again into the system. There is no option to reverse this update once it is performed.

This update will also remove the invoice (or credit memo) number from the invoice log table. This is different from the way the system retains the number when deleting an invoice manually. When manually deleting a record, the system maintains the invoice number in the log, but marks it as deleted. Here, the purge utility will remove the record from the invoice log as well as from the unposted customer invoice table.

Restrictions and Limitations

- This utility will not delete invoices that originated from Work Order. It will also not delete any that are currently locked or those that cannot be removed using the Delete option in Customer Invoice Entry.
- Committed invoices selected for online tax calculation will not be purged. As these invoices require additional steps on the Avalara portal, they must be deleted one at a time.
- This utility requires a level 8 or higher security to the AR security category.

CM Add DI to Reconciliation Adjustment Entry

! TOP SUGGESTION BOX REQUEST!

The Document Imaging Slider Bar has been added to Reconciliation Adjustment Entry. Images and files added here are stored in the new Adjustments drawer in the Cash Management Cabinet within the DI file system.

Images and files are available and may be viewed on the G/L Detail Inquiry and Search DI screen.

DE Overview of the Union Services

It goes without saying that union setup and maintenance is complicated. With that said, there are six different web services provided to help out here. The following picture explains which service to use for the specific section of Union File Maintenance.

The screenshot shows the 'Edit Union' window with the following callouts:

- NEW! Union Rates Import**: Points to the 'Rates' tab.
- Union Fringes Import**: Points to the 'Fringes' tab.
- Union Import**: Points to the 'Overtime Rules' tab.
- Union Benefit Tier Import**: Points to the 'Benefit Tiers' tab.
- Union Import**: Points to the 'Description' and 'Craft' fields.
- NEW! Union Benefit Tier Override Import**: Points to the 'Deductions and add-ons' table.
- Union Deduction / Add-on Import**: Points to the 'Deductions and add-ons' table.

The 'Deductions and add-ons' table contains the following data:

Code	Description	Method	Rate	Gross pay	Formula	Code type
DU	Dues	Regular	.500	No		Deduction
VC	Vacation	All hours	1.000	Yes		Deduction

DE Add/Update Union Pay Rates

 [TOP SUGGESTION BOX REQUEST!](#)

Use to set pay rates for those that are not using Wage Codes.

DE Add/Update Union Benefit Tier Overrides

 [TOP SUGGESTION BOX REQUEST!](#)

Use to set override rates on benefit tiers.

DE Add/Update Wage Codes

 [TOP SUGGESTION BOX REQUEST!](#)

Use to create or change a wage code.

DI Do Not Display Complex PDFs

Certain PDFs cause Spectrum's Document Imaging viewer to consume server resources in a way that makes it impossible to use Spectrum. Examples of these complex PDFs include those with annotations and fillable forms.

To address this issue, a new filter has been added to the system that attempts to identify these files ahead of time. Instead of displaying the PDF (and consume resources) the user will instead be prompted to download the file to view. By not displaying the PDF in the Spectrum viewer, server resources will not be consumed. The filter does not change the file in any way.

The filter is not enabled by default. As it aggressively looks for attributes known to cause issues, it is possible that a file will be set to download when this is not needed. For this reason, clients that have not experienced this issue can continue with the filter disabled.

To enable the filter, navigate to **Admin | Installation | Document Imaging** and select the 'Avoid displaying complex PDFs in viewer' checkbox.

DI Refresh Added to Images

 [TOP SUGGESTION BOX REQUEST!](#)

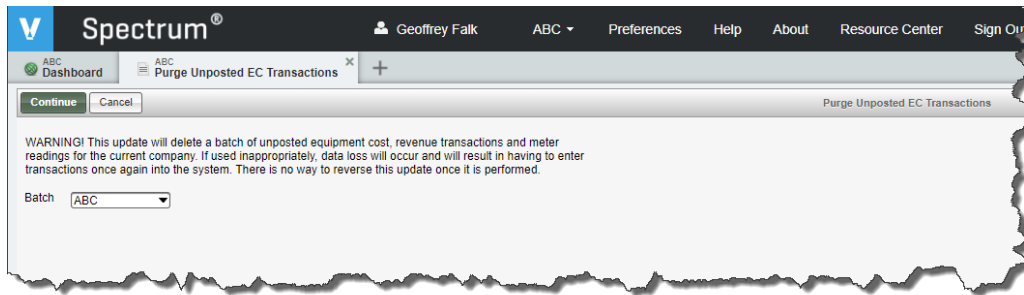
Clients have requested a Refresh button on the Images pages. When adding new images, they do not immediately appear. Now the user can simply click the Refresh button instead of backing out and reentering the screen.

EC Purge Unposted EC Transactions

 [TOP SUGGESTION BOX REQUEST!](#)

There are times when it is desirable to delete out a batch of unposted transactions. Clients using SDX report that they have imported too many transactions and they want to clear the batch and start over. This is a common question to the Support desk.

Enter the batch code to delete and then click **Continue**.



Warning

This update will delete a batch of unposted equipment cost, revenue transactions and meter readings for the current company. If used inappropriately, data loss will occur. This will result in having to enter transactions once again into the system. There is no option to reverse this update once it is performed.

Restrictions and Limitations

- This utility will not delete records that are currently locked.
- This utility requires a level 8 or higher security to the EC security category.

GL Journal Entry Clear Flag Moved from Error Recovery to Utilities

The Reset Journal Entry Update Flag from Error Recovery has been moved to General Ledger | Utilities. It should only be used under the direction of Spectrum support personnel. When used appropriately, the Journal Entry Update will be reset to allow processing.

It requires a level 9 of security category GL (General Ledger) to access.

GL Error Recovery Journal Entry Moved to Utilities

The Error Recovery Journal Entry from Error Recovery has been moved to General Ledger | Utilities. This type of journal entry allows for a one-sided entry as well as a one-sided cost center adjustment. It should only be used under the direction of Spectrum Support.

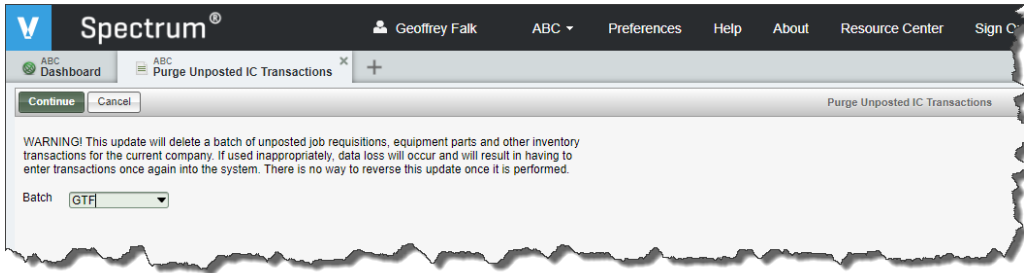
This screen requires a level 9 of security category ER (Error Recovery) to access. The option **will not** appear on the Site Map when the user does not have security access.

IC Purge Unposted IC Transactions

! TOP SUGGESTION BOX REQUEST!

There are times when it is desirable to delete out a batch of unposted transactions. Clients using SDX report that they have imported too many transactions and they want to clear the batch and start over. This is a common question to the Support desk.

Enter the batch code to delete and then click **Continue**.



Warning

This update will delete a batch of unposted inventory job requisitions, equipment parts and other inventory transactions for the current company. If used inappropriately, data loss will occur. This will result in having to enter transactions once again into the system. There is no option to reverse this update once it is performed.

Restrictions and Limitations

- This utility will not delete records that are currently locked.
- This utility requires a level 8 or higher security to the IC security category.

JC Refresh Added to Job Materials

! TOP SUGGESTION BOX REQUEST!

Clients have requested a Refresh button on the Job Materials page.

JC Refresh Added to Job Subcontracts

! TOP SUGGESTION BOX REQUEST!

Clients have requested a Refresh button on the Job Materials page.

JC Refresh Added to Job Images

! TOP SUGGESTION BOX REQUEST!

Clients have requested a Refresh button on the Job Materials page. When adding new images, they do not immediately appear. Now the user can simply click the Refresh button instead of backing out and reentering the screen.

JC PO Accrual Added to Reclassify History

! TOP SUGGESTION BOX REQUEST!

It is now possible to select 'PO-Accrual' transactions in the Reclassify Job Cost History feature. In earlier Spectrum development, we introduced the concept of an accrued cost on a job purchase order. Based on client feedback, we added 'PO-Accrual' to the list of transaction types available in Reclassify History.

IMPORTANT: These transactions can be edited as an 'AP-Vendor' transactions from the Job Cost Transaction Entry screen. Note that they will retain their transaction type of 'PO-Accrual' though.

JC Quantity History Report

The purpose of this report is to explain the history of quantities entered onto a job in Quantity Entry and in Payroll. This report does not include any quantities that come from Accounts Payable, Purchase Order and Inventory Control.

ABC Inc Quantity History Report			
	Date Entered	Year / Period	Quantity
Job 376 I-875 Flyover Ramp North			
Phase 01-0200 Other Allowances - Cost type: L Labor			
	03/31/20	2019 / 03	500.00
	04/30/20	2019 / 04	474.00
	05/30/20	2019 / 05	1,005.00
	06/30/20	2019 / 06	875.00
Subtotal for Phase 01-0200 Other Allowances - Cost type: L Labor			2,854.00
Phase 01-0200 Other Allowances - Cost type: M Materials			
	03/31/20	2019 / 03	500.00
	04/30/20	2019 / 04	474.00
	05/30/20	2019 / 05	1,005.00
	06/30/20	2019 / 06	875.00
Subtotal for Phase 01-0200 Other Allowances - Cost type: M Materials			2,854.00
Phase 01-0200 Other Allowances - Cost type: O Overhead			
	03/31/20	2019 / 03	500.00
	04/30/20	2019 / 04	474.00
	05/30/20	2019 / 05	1,005.00
	06/30/20	2019 / 06	875.00
Subtotal for Phase 01-0200 Other Allowances - Cost type: O Overhead			2,854.00
Phase 01-0200 Other Allowances - Cost type: S Subcontracts			
	03/31/20	2019 / 03	500.00
	04/30/20	2019 / 04	474.00
	05/30/20	2019 / 05	1,005.00
	06/30/20	2019 / 06	875.00
Subtotal for Phase 01-0200 Other Allowances - Cost type: S Subcontracts			2,854.00
Subtotal for Phase 01-0200 Other Allowances			11,416.00
Total for Job 376 I-875 Flyover Ramp North			11,416.00

JC Purge Unposted JC Transactions

! TOP SUGGESTION BOX REQUEST!

There are times when it is desirable to delete out a batch of unposted transactions. Clients using SDX report that they have imported too many transactions and they want to clear the batch and start over. This is a common question to the Support desk.

Enter the batch code to delete and then click **Continue**.



Warning

This update will delete a batch of unposted job cost transactions for the current company. If used inappropriately, data loss will occur. This will result in having to enter transactions once again into the system. There is no option to reverse this update once it is performed.

Restrictions and Limitations

- This utility will not delete records that are currently locked.
- This utility requires a level 8 or higher security to the JC security category.

PR Time Off Code Listing in Crystal

The Time Off Code Listing has been refactored into a Crystal Report. The report also includes additional informational fields:

- Pay Check Label
- Set Zero On Anniversary
- Suspend Accrual if Over Limit
- Balance Limit

ABC Inc											
Time Off Code Listing											
Time Off Code	Pay Type	Pay Check Label	Accrual Method	Hourly Accrual Basis	Accrual Rate	Hours Limit Per Year	Set To Zero On Anniversary?		Suspend Accrual If Over Limit?		Next Code
							Balance Limit	Eligibility Months	Use Once		
H8 (HOLIDAY)	Holiday	Holiday	Hourly	Regular, Vacation, Holiday, Sick	0.50000	64.00					
P1 (PTO: 40 hours a year)	Vacation	PTO	Pay Cycle		0.76923	40.00	Yes	80.00			
P2 (Paid Time Off is Cool)	Vacation	PTO ROCKS	Pay Cycle		0.80000	40.00	Yes				
P3 (Paid Time Off - 3 Weeks)	Vacation	PTO ROCKS	Pay Cycle		3.00000	120.00	Yes				
S1 (SICK PAY: LABORER)	Sick	Sick	Pay Cycle		0.76900	40.00					
S2 (SICK PAY: FOREMAN)	Sick	Sick	Pay Cycle		0.76900	40.00				3	
S3 (SICK PAY: APPRENTICE)	Sick	Sick	Pay Cycle		0.76900	40.00				12	
S4 (SICK PAY: ADMIN.)	Sick	Sick	Pay Cycle		0.76900	40.00					
S9 (WA Sick Leave)	Sick	Sick	Hourly	Regular, Overtime, Double time	0.02500	999.00				3	
T1 (Testing)	Vacation	Vacation	Hourly	All pay types	0.01961	40.00	Yes				
T2 (Testing PE)	Vacation	Vacation	Pay Cycle		0.76920	40.00	Yes				
V1 (VACATION: ONE WEEK)	Vacation	Vacation	Pay Cycle		0.80000	40.00	Yes	Yes			Yes V2
V2 (VACATION: TWO WEEKS)	Vacation	Vacation	Pay Cycle		1.60000	80.00	Yes				
V3 (VACATION: THREE WEEKS)	Vacation	Vacation	Pay Cycle		2.40000	120.00					
V4 (VACATION: FOUR WEEKS)	Vacation	Vacation	Pay Cycle		3.20000	160.00					
X1 (Testing)	Vacation	Vacation	Hourly	All pay types	1.00000	40.00				8	

PR Add Status Filter to Recurring Deductions / Add-ons

TOP SUGGESTION BOX REQUEST!

Clients report that they have so many recurring add-ons and deductions that it is easy to miss updating one at year-end. Adding a standard status display window with the following options all selected resolves this issue. Statuses include:

- Recurring
- One time
- Inactive
- Skip once

The Status Filter is available on the Recurring Deductions/Add-on screen and Entities Deductions/Add-ons window.

PR Tax Table Audit Log

A new option, Audit Log, has been added to the Command Bar on the Tax Table Maintenance screen. When selected, the Payroll Tax Table Audit Log report appears in a new Spectrum tab.



Spectrum has audited the tax tables for many versions, but you had to be a System Administrator to be able to access it. Now, the user who maintains tax tables can also run the Audit Log to view all changes made.

ABC Inc				
Payroll Tax Table Audit Log				
Table Name	Event	Date / Time	Company - Operator - Name	Record Keys
PR_TAX_TABLE	Update	12/12/19 11:24:55AM	XYZ-JCM-Julia Goolia	Filing_Status=HEAD OF HOUSEHOLD,Tax_Table_Code=IL
Column Name	Old Value			New Value
Round_Withholding_Flag				Y
Rate_Percent	3.0000			4.9500

While this option has its own security setting, it is the same as Tax Table Maintenance. This screen requires access to Payroll level 6 or higher.

PR SUTA Tax ID Number

Certain states have different tax ID numbers for withholdings and unemployment. The Other Taxes tab of the Tax Table has been enhanced with a SUTA tax ID number field. This SUTA ID will now appear on the Unemployment Report.

Notice that the 'Taxpayer ID' comes from the Income Tax tab, where the 'SUTA Tax ID' comes from the Other Taxes tab.

ABC Inc UNEMPLOYMENT TAX REPORT Check Date From 01/01/20 Through 09/16/20								
Tax Code: WA - Washington		Taxpayer ID: 91-11564351		SUTA Tax ID: 91-87915501		Limit: 21,300.00		
Employee Code	Dept.	Social Security	Name	Hours	Unemployment Tax Amount	Subject To Amount	Excess	Weeks Worked
BOOBRE	1J		Mark White	140.00	59.75	2,390.00		3
BUHJAY	2J	***-**-3333	Jay Buhner	742.00	606.25	24,248.64		9
CAMMIK	1J		Mike Cameron	26.00	17.07	682.64		1
FALGEO	1J	***-**-3333	Geoffrey Falk	168.00	137.50	9,475.00	3,975.00	2
GRIKEN	2J		Ken Griffey Jr.	59.00	18.07	722.86		2
HENJOS	1A		Josephine Hendricks	40.00	42.00	1,680.00		1
ICHIRG	2J		Ray Smith	152.00	96.50	3,882.00		4

PR Recap Totals by Employee on Wage and Tax Report

Clients need more detail to help them troubleshoot rounding and other issues on the Quarterly Federal Tax report. To support this request, the detail version of the Wage and Tax Report has been enhanced to provide totals by employee and for the report.

ABC Inc Detail Wage and Tax History Report Sorted by Employee												
Tax Code	Gross	Income Tax		Worker's Comp		Employee FICA / SDI		Employer FICA / SDI		Unemployment		
		Subject To	Tax	Employee	Employer	Subject To	Tax	Subject To	Tax	Subject To	Tax	
Employee: BUHJAY Jay Buhner												
Check #:	7565	Type:	R	Check date:	05/20/20	Pay period end date:	05/15/20					
US	634.00		513.90	18.41	0.00	0.00	609.00	46.59	609.00	46.59	609.00	1.65
WA	634.00		634.00	0.00	30.00	84.40	634.00	0.00	634.00	0.00	634.00	15.85
Check #:	7566	Type:	R	Check date:	05/27/20	Pay period end date:	05/22/20					
US	634.00		513.90	18.41	0.00	0.00	609.00	46.59	609.00	46.59	609.00	0.00
WA	634.00		634.00	0.00	30.00	84.40	634.00	0.00	634.00	0.00	634.00	15.85
Check #:	7735	Type:	R	Check date:	05/15/20	Pay period end date:	05/15/20					
US	2,730.00		2,295.50	333.39	0.00	0.00	2,705.00	206.94	2,705.00	206.94	2,705.00	0.00
OR	2,730.00		2,295.50	193.81	0.00	10.00	2,705.00	2.63	2,705.00	1.58	2,705.00	94.68
WA	2,730.00		2,295.50	0.00	0.00	0.00	2,705.00	135.25	2,705.00	135.25	0.00	0.00
X1	2,730.00		2,730.00	162.07	0.00	0.00	2,730.00	0.75	2,730.00	1.50	2,730.00	10.92
Y1	2,730.00		2,730.00	20.48	0.00	0.00	2,730.00	0.00	2,730.00	0.00	2,730.00	6.83
Total for employee: BUHJAY												
US	3,998.00		3,323.30	370.21			3,923.00	243.23	3,923.00	243.23	3,923.00	1.65
							Medicare	56.89	3,923.00	56.89		
OR	2,730.00		2,295.50	193.81		10.00	2,705.00	2.63	2,705.00	1.58	2,705.00	94.68
WA	3,998.00		3,563.50		60.00	168.80	3,973.00	135.25	3,973.00	135.25	1,268.00	31.70
X1	2,730.00		2,730.00	162.07			2,730.00	0.75	2,730.00	1.50	2,730.00	10.92
Y1	2,730.00		2,730.00	20.48			2,730.00		2,730.00		2,730.00	6.83
Totals:				746.57	60.00	178.80	438.75	438.45	438.45	438.45	145.78	

While the above example is for the US, Canadian systems use the exact same format.

Employee Recap

The first two rows of the employee recap will display federal information totals. The remaining tax codes will display alphabetically, one line each.

Report Recap

Following the pattern of the employee recap, the first two rows will display federal information totals. The remaining tax codes will display alphabetically, one line each.

PR Form 1095-C Processing for Nelco

UNITED STATES SYSTEMS ONLY

Federal filing is offered at no additional cost. State filing is fee-based service.

Viewpoint has partnered with Nelco to provide federal electronic filing for the Affordable Care Act (ACA). In 2020, California, New Jersey, Rhode Island, and Washington DC have state ACA reporting requirements.

IMPORTANT CHANGES FOR 2020

1. The 'Plan start month' is now **REQUIRED** on Form 1095-C.
2. Additional requirements exist when a Health Reimbursement Arrangement (HRA) is used to satisfy coverage requirements.

1 - Plan Start Month Required

Starting in 2020, the Plan start month is a required field every employee. The software will display an error message when the field is <BLANK>.

Enter the month when coverage was offered, where 01 represents January, 02 is February and so on. In the event that no offer of coverage was offered, enter 00.

Please consult your outside CPA or tax expert for more guidance.

Update Plan Start Month Utility

A new option has been added to the Command Bar on the Form 1095-C Maintenance page. Titled 'Update Plan Start Month', it will populate the employee's plan start date based on selected criteria.

This utility will only populate <BLANK> fields for the current year. It will not change the plan start month when one had been imported or manually entered.

Here are the steps to use the utility:

1. From the Form 1095-C Maintenance page, click the **Update Plan Start Month** option on the Command Bar.
2. Select the 'Set plan start month to annual coverage renewal month (01-12). If your benefit plan starts annually in January, enter 01.
3. Does this apply to all employees or only those hired prior to the reporting year (i.e. hired last year or earlier).
4. To use the new hire's start date to determine the plan start month, select the 'Set plan start month for employees hired in 2020 to hire/rehire month plus 0-12 months'. If benefits are offered upon hire date, enter 0. If benefits are offered 3 months after hire date, enter 3.

IMPORTANT: The utility will not update any new hire without an original hire date or last rehire date.

Update Plan Start Month

This update will populate the employee's plan start month based on the following settings.
It will not overwrite any existing data.

Year 2020

Set plan start month to annual coverage renewal month (01-12) 01

All employees

Employees hired prior to 2020

Set plan start month for employees hired in 2020 to hire/rehire month plus 03 months (0-12)

Employees without a hire date will not be updated.

OK Cancel

Here, all employees hired prior to 2020 will be assigned '01' as their plan start month.

New employees (those hired within 2020) will be assigned three months from their hire/rehire month.

2 - Health Reimbursement Arrangement (HRA)

Starting in 2020, the IRS allows a Health Reimbursement Arrangement (HRA) to be used to satisfy the coverage requirements. In general, employers that do not use HRAs will process form 1095-C as in past years. Please consult your outside CPA or tax expert for more guidance.

Additional requirements for employers who provide coverage with an HRA include:

- Employee's age as January 1st of the reporting year
- New 'Offer of coverage' codes
 - **1L – Qual offer w/HRA: employee, emp res zip**
Individual coverage health reimbursement arrangement (HRA) offered to you only with affordability determined by using employee's primary residence location ZIP code.
 - **1M - Qual offer w/HRA: employee+dependents, emp res zip**
Individual coverage HRA offered to you and dependent(s) (not spouse) with affordability determined by using employee's primary residence location ZIP code.
 - **1N - Qual offer w/HRA: employee+spouse+dependents, emp res zip**
Individual coverage HRA offered to you, spouse and dependent(s) with affordability determined by using employee's primary residence location ZIP code.
 - **1O – Qual offer w/HRA: employee, emp work zip**
Individual coverage HRA offered to you only using the employee's primary employment site ZIP code affordability safe harbor.
 - **1P – Qual offer w/HRA: employee+dependents, emp work zip**
Individual coverage HRA offered to you and dependent(s) (not spouse) using the employee's primary employment site ZIP code affordability safe harbor.
 - **1Q – Qual offer w/HRA: employee+spouse+dependents, emp work zip**
Individual coverage HRA offered to you, spouse and dependent(s) using the employee's primary employment site ZIP code affordability safe harbor.
 - **1R – HRA not affordable: employee+spouse+dependents**
Individual coverage HRA that is NOT affordable offered to you; employee and spouse or dependent(s); or employee, spouse, and dependents.
 - **1S – HRA offered to part time employee**
Individual coverage HRA offered to an individual who was not a full-time employee.
- Zip code
This line reports the applicable ZIP code your employer used for determining affordability if you were offered an individual coverage HRA. If code 1L, 1M, or 1N was used on line 14, this will be your primary residence location. If code 1O, 1P, or 1Q was used on line 14, this will be your primary work location. For more information about individual coverage HRAs, visit [IRS.gov](https://www.irs.gov).

Export and Import Worksheet Changes

Both the Export Worksheet and Import Worksheet contain new columns for this information:

- HRA (Y/blank)
- Box 17 Zip
- Employee Age

Edit Form 1095-C

A new checkbox titled 'Employer provided coverage using an HRA?' has been added.

When HRA checkbox not selected
 The window appears as it has in prior versions.

When HRA checkbox selected
 The 'Employee age at January 1' and 'Zip code' fields appear. Also, the user has access to the new 'Offer of coverage' codes added this year.

PR Print 1095-C's in Same Order as W-2's

UNITED STATES SYSTEMS ONLY
TOP SUGGESTION BOX REQUEST!

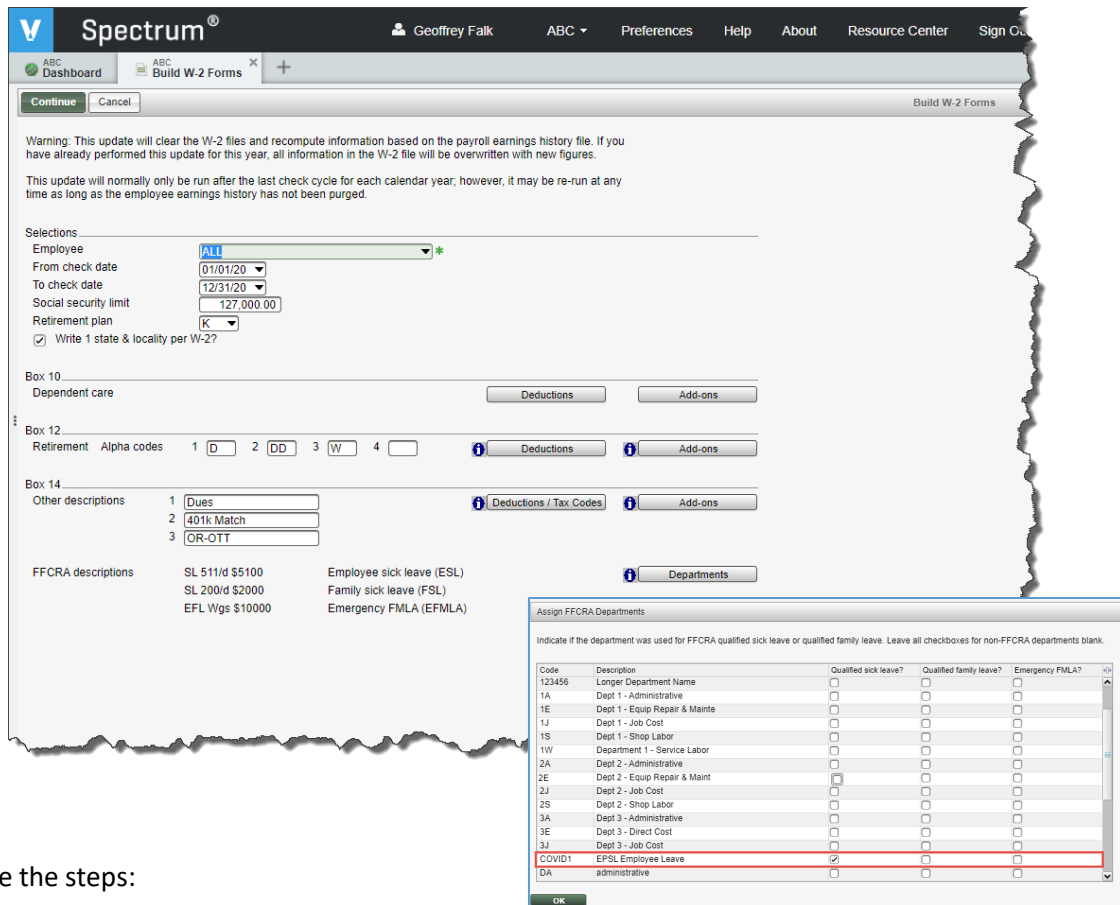
To assist with the the stuffing the W-2's and 1095's into the same envelope, 1095's can now be printed with the same options as found on W-2s.

PR W-2 Reporting for FFCRA/COVID Wages

UNITED STATES SYSTEMS ONLY

For 2020, the IRS requires qualified sick leave wages and qualified family leave wages must be included in Boxes 1, 3 (up to the social security wage base) and 5 on Form W-2. They also must be reported in Box 14.

Defining FFCRA Wages on Form W-2



Here are the steps:

1. On the Build W-2 Forms page, select the **Departments** button.
2. The Assign FFCRA Departments window appears.
3. Select the department the correlates to the type of qualified leave.
4. Click **OK** to save.

How FFCRA Wages Appear on Form W-2

The Build uses these labels to identify qualified leave:

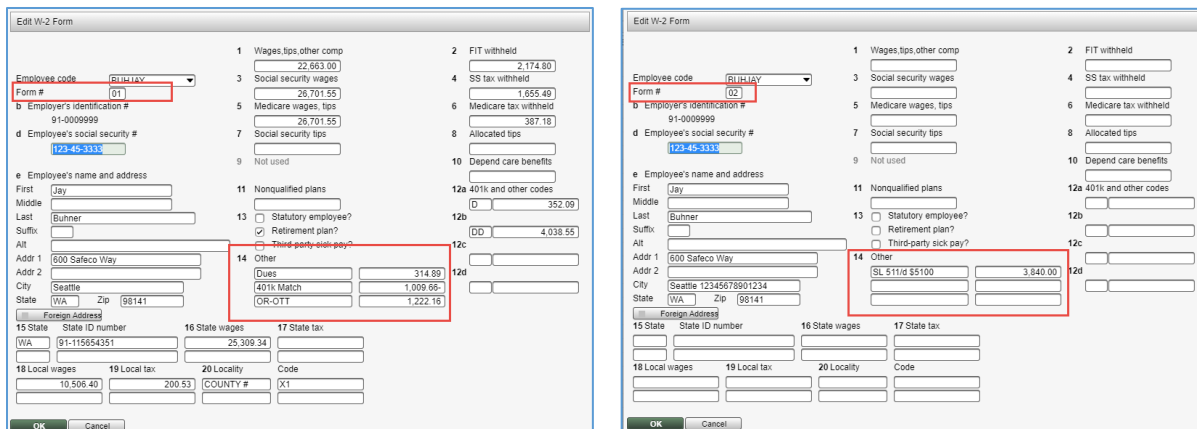
Leave Type	W-2 Label	Description
Employee Sick Leave	SL 511/d \$5100	Employee sick leave up to \$511 per day. Maximum 10 days or \$5,100.

Family Sick Leave	SL 200/d \$2000	Family sick leave up to \$200 per day. Maximum 10 days or \$2,000.
Emergency FMLA	EFL Wgs \$10000	Emergency Family Leave up to \$10,000.

Additional Forms Automatically Created For Extra Box 14 Items

As it is possible to have three items plus up to three FFCRA items for an employee, the Build process will create an extra form automatically.

- In an effort to reduce the number of forms printed, when the employee only has one of the Box 14 items and has one COVID-19 department, the COVID wages appear in the next empty field.
- When the employee has all three of the entered Box 14 AND at least one COVID-19 department, an extra W-2 form will be created for the overflow of Box 14. In the example below, the employee has two forms.



Additional Forms Created when the Write 1 State & Locality per W-2 has COVID-19 Overflow

When the 'Write 1 state & locality per W-2' option is selected and the employee has COVID-19 earnings, the following explains how multiple W-2 forms will be created:

- Form 01: US and Home State with Box 14
- Form 02: Box 14 overflow. No other numbers will appear.
- Form 03 - 99: One State and one Locality, alphabetically per form.

PR W-2 Processing with Nelco

This is a fee-based service.

Viewpoint has partnered with Nelco to provide an alternative solution to Federal and State e-filing.

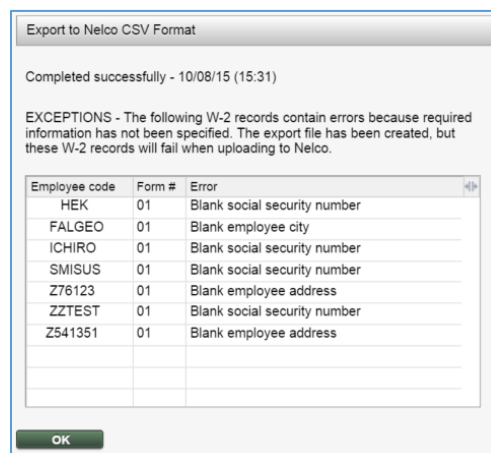
While many states use the federal electronic file format, there are some that do not. Nelco can be used to create these files in each state's preferred method. Additionally, Nelco provides also provides delivery of forms to employees.

Here are the steps:

1. Navigate to **Payroll | Period End | W-2 Processing**.
2. Click **Export**.
3. Enter the 'Year' and complete your company's information.
4. Click **Nelco CSV**.
5. Click **Continue**.
6. Upload the file to Nelco for processing at <https://spectrum.nelcoportal.com/import/gwximport>

Errors

If errors were found during the export, the user will receive a window explaining the issue. When there is more than one error in a record, only the first error will display.



It is important to note that these error records are corrected prior to uploading the file to Nelco. Examples of errors include:

- Blank Employee SSN
- Blank Employee Address
- Blank Employee City
- Blank Employee State
- Blank Employee Zip Code

PR Nelco to Use Employee Home Email Address

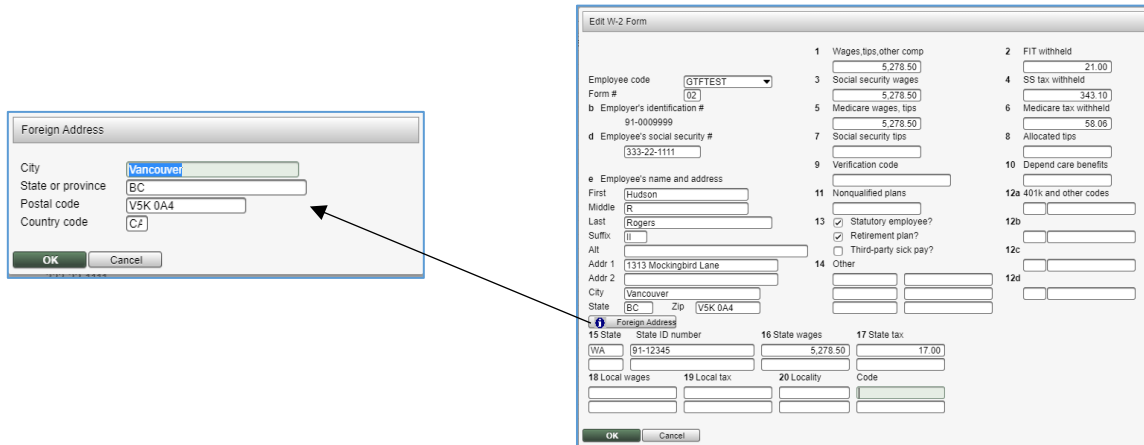
TOP SUGGESTION BOX REQUEST!

When building W-2's, the system looks for the employee email address for processing with Nelco. The system has been changed to first look to the employee's 'Home email'. If that field is <BLANK>, then it will use the employee's 'Work email'.

PR Foreign Address Support for Nelco

The Nelco export CSV file has been enhanced with additional columns for Foreign Address, Foreign State or Province Code and Foreign Country to accommodate foreign employees.

The Payroll Administrator will enter the information by clicking the **Foreign Address** button in the Edit W-2 Form window. Note that this information is not retained from year to year.



This information will be included in the Nelco export CSV file.

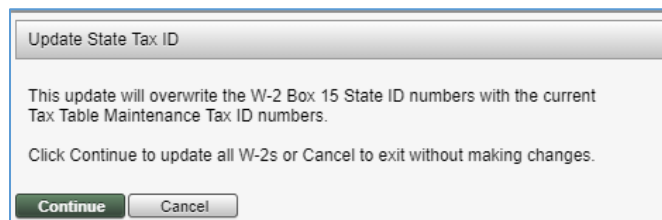
PR State Tax ID Update for Nelco

UNITED STATES SYSTEMS ONLY

Nelco requires all state records to contain a State ID, even for those that do not have a state income tax. The Payroll Administrator only finds out about this requirement after they have submitted the file to Nelco.

To resolve this issue, a new utility titled, 'Update State ID', has been added to the W-2 Processing screen. After uploading the file to Nelco, the Payroll Administrator gets notified of the error. They can now use this utility to correct the file and resubmit. Here are the steps:

1. From W-2 Form Maintenance, navigate to **Export | Nelco CSV**.
2. Click **Continue** to download the file once again.
3. Review Export to Nelco CSV Format window for exceptions
4. Return to the W-2 Form Maintenance screen and review the employees with blank State Tax ID's.
5. Navigate to **Payroll | Maintenance | Tax Table Maintenance** and update the 'Tax ID number' field.
6. Return to W-2 Form Maintenance and click **Update State ID**. Click **Continue** to proceed.



7. Perform the export to Nelco using **Export | Nelco CSV**.

To get to Nelco’s portal, navigate your browser to <https://spectrum.nelcoportal.com/import/gwximport>.

PR Electronic Filing Number Support for Nelco

IOWA BUSINESS EFILE NUMBER (BEN)

When filing W-2’s electronically with Nelco, the state of Iowa requires an additional electronic filing number. To support this Business eFile Number (aka ‘BEN’), a new field titled ‘Electronic filing #’ has been added to the tax tables.

IMPORTANT NOTES

- Leave this field <BLANK> when not needed.
- Iowa will not accept zeros in this field.
- Today, this field is used for Nelco’s W-2 export.

The screenshot shows the 'Edit Tax Table' window with the following details:

- Tax table: IA (Iowa)
- Description: Iowa
- Tax ID number: 91-1234456
- G/L liability account: 02-29
- W-2 state abbreviation: IA
- Electronic filing #: BEN 12345678 (highlighted in red)

Below the form fields is a table with columns for Filing status, Calculation type, and Tax details. The table lists various filing statuses like SINGLES, MARRIED, HEAD OF HOUSEHOLD, and OTHER, each with associated graduated tables and tax brackets.

Electronic filing # is also known as Iowa’s Business eFile Number (BEN).

PR T4 Reporting for COVID Wages

CANADIAN SYSTEMS ONLY

For 2020, the Canada Revenue Agency (CRA) requires that in addition to employment income being reported in Box 14, new Other Information codes should be used for earnings in the following periods:

- Code 57: Employment income – March 15 to May 9
- Code 58: Employment income – May 10 to July 4
- Code 59: Employment income – July 5 to August 29
- Code 60: Employment income – August 30 to September 26

The T4 Build automatically calculates and adds these Other Information codes accordingly. The export for the CRA also includes this new information.

PR Backup W-2/T4 Records to History

TOP SUGGESTION BOX REQUEST!

Once the Payroll Administrator has made any manual adjustments and has finalized their W-2 or T4 information, they will save this information into a new history table.

A new option, titled 'Backup' has been added to the W-2 Processing and T4 Processing pages. When selected, a new window will appear:

The image shows two side-by-side dialog boxes. The left one is titled 'Back Up W-2 Records to History' and the right one is titled 'Back Up T4 Records to History'. Both boxes contain the following text: 'IMPORTANT! This utility stores the current W-2 information into a history table for later use.' and 'While this can be run multiple times, only the latest version will be saved.' Below this, there is a 'Year' field with '2020' entered. Underneath, it asks 'Proceed with update?' with two radio button options: 'Yes, write information to history' and 'No, cancel update'. The 'No' option is selected in both. At the bottom of each box are 'OK' and 'Cancel' buttons.

This process is available before or after the electronic files and printing of forms takes place.

While it can be run multiple times, only the latest version will be saved. The following warning will appear when data has already been saved for the payroll year.

The image shows two side-by-side warning dialog boxes. The left one is titled 'W-2 History Records Already Exist' and the right one is titled 'T4 History Records Already Exist'. Both boxes contain the following text: 'WARNING - History records already exist for 2020.' and 'Click Continue to overwrite these records or Cancel to exit without updating.' At the bottom of each box are 'Continue' and 'Cancel' buttons.

IMPORTANT! A future release will provide the ability to reprint these forms. The information will be stored in new tables: PR_W2_HISTORY_MC or PR_T4_HISTORY_MC. Remember that the employee's SSN or SIN is encrypted in the database.

PR Non-Standard Calendar Year

TOP SUGGESTION BOX REQUEST!

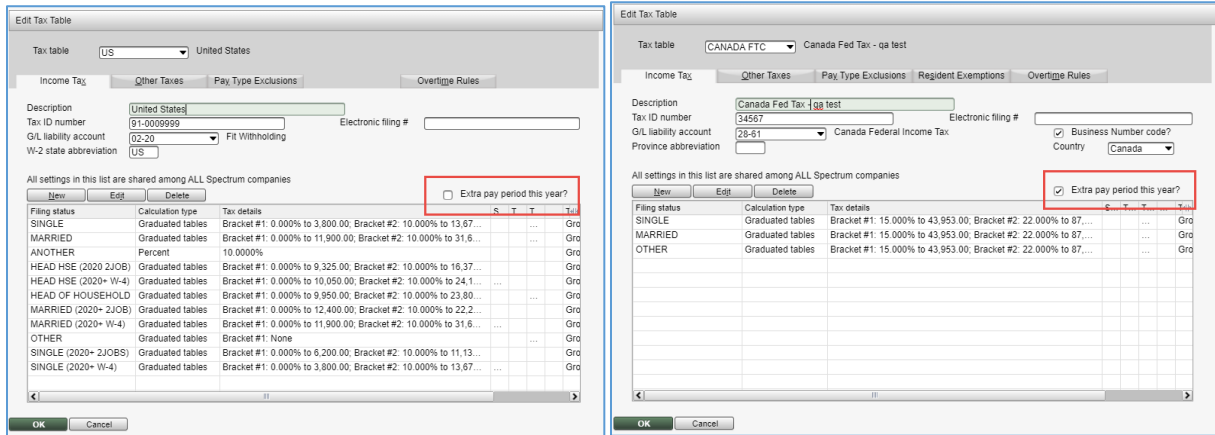
Payroll Administrators have raised concern that every 7 years for a weekly payroll and every 11 years for a biweekly payroll, the payroll calendar year has an extra pay period. 53 pay periods instead of 52 for weekly payrolls, 27 instead of 26 biweekly payrolls.

To calculate payroll taxes properly, the system will calculate using the appropriate weekly and biweekly payrolls that occur in a non-standard calendar year.

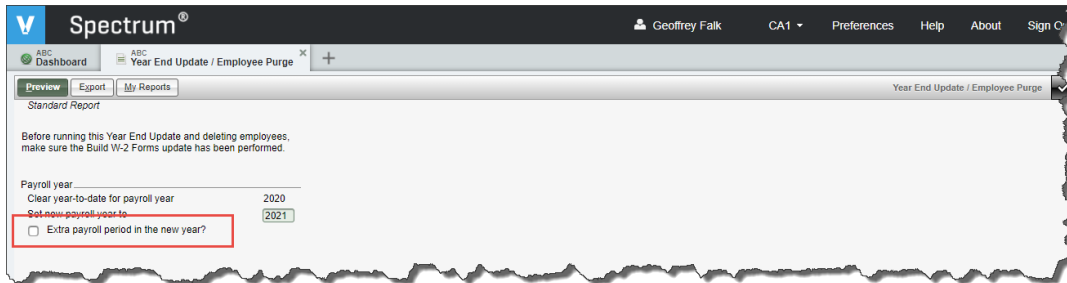
How to Enable a Non-standard Calendar Year

There are two ways to enable using the non-standard calendar year.

1. **Tax Table Maintenance:** For the **Federal tax code only**, select the ‘Extra pay period this year?’ checkbox. While this option may be set at any time during the year, it only calculates using the non-standard calendar year going forward.



2. **Year End Update:** The ability to set the new year as non-standard may be set during the Year End Update. Note that selecting the flag here will also set it over in Tax Table Maintenance.



Based on this setting, Spectrum will annualize wages using the following schedule:

Payment Frequency	Extra Pay Periods - No	Extra Pay Periods - Yes
Weekly	52	53
Bi-weekly	26	27

No change to Semi-monthly, Monthly, Quarterly and Annually.

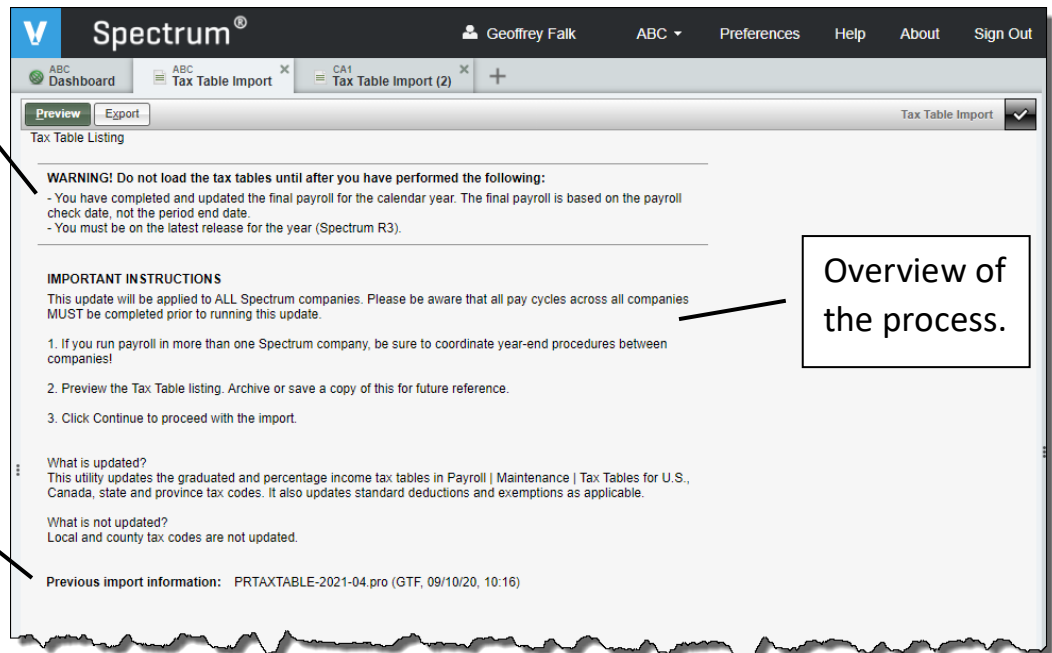
IMPORTANT! The Employee Pay Rates page will not display the effects of an extra pay period. This was by design as this is an infrequent occurrence. The annualized rate will remain calculated using a standard calendar year.

PR Streamlined Tax Table Import Workflow

We have streamlined and improved the workflow to import Payroll tax tables.

Warnings about when to import and when not to.

Information about the last time the import was performed, file version and operator code display.



To assist the Payroll Administrator, instructions are contained on the first page.

WARNING! Do not load the tax tables until after you have performed the following:

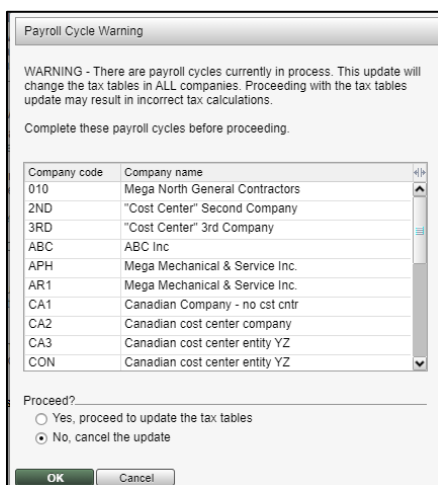
- You have completed and updated the final payroll for the calendar year. The final payroll is based on the payroll check date, not the period end date.
- You must be on the latest release for the year (Spectrum R3).

IMPORTANT INSTRUCTIONS

This update will be applied to ALL Spectrum companies. Please be aware that all pay cycles across all companies MUST be completed prior to running this update.

1. **If you run payroll in more than one Spectrum company, be sure to coordinate year-end procedures between companies!**

In the event that open pay cycles exist in other companies, the following warning will appear:



It is recommended that you cancel the update and verify that these pay cycles are complete before proceeding.

2. **Preview the Tax Table listing. Archive or save a copy of this for future reference.**

This report will be extremely long! It will contain one set of tax tables for each Spectrum company. It is recommended that you save a copy of this file in case you want to reference the way your tax tables existed prior to the import.

3. **Click Continue to upload the file and to proceed with the import.**

It is recommended that no other users be in Tax Table Maintenance during the update. The file must be in the format of PRTAXTABLE-YYYY-VV.pro, where YYYY is the year and VV is the version of the file.

TIP: Always check the Viewpoint Customer Portal for updates to the tax table.

What is updated?

This utility updates the graduated and percentage income tax tables in Payroll | Maintenance | Tax Tables for U.S., Canada, state and province tax codes. It also updates standard deductions and exemptions as applicable.

What is not updated?

Local and county tax codes are not updated.

Previous import information: PRTAXTABLE-2021-XX.pro (ABC, 01/03/21, 08:00)

Where:

- YYYY is the calendar year of the file.
- XX is the version of the tax table. Always load the highest version of the tax table.
- ABC represents the operator ID of the person who imported the file
- Date and time the file was imported

Always load the highest version of the tax tables. They do not need to be loaded sequentially. For example, if you have two files PRTAXTABLE-2021-01 and PRTAXTABLE-2021-02, just load the '02' version. It will contain everything contained in '01'.

TIP: Don't forget that there is a new Tax Table Audit Log available in Tax Table Maintenance!

PR Stronger Warnings Before Purging Data

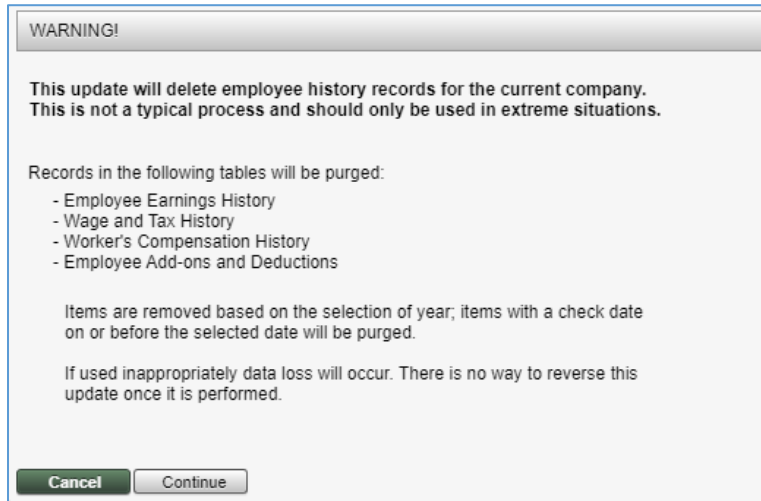
Support reports that some clients misunderstand the purpose of these tools and accidentally purge data. As they are near the Year End Update on the Site Map, clients assumed that these were normal year-end processes.

To emphasize that these are not typical processes, the following have been added:

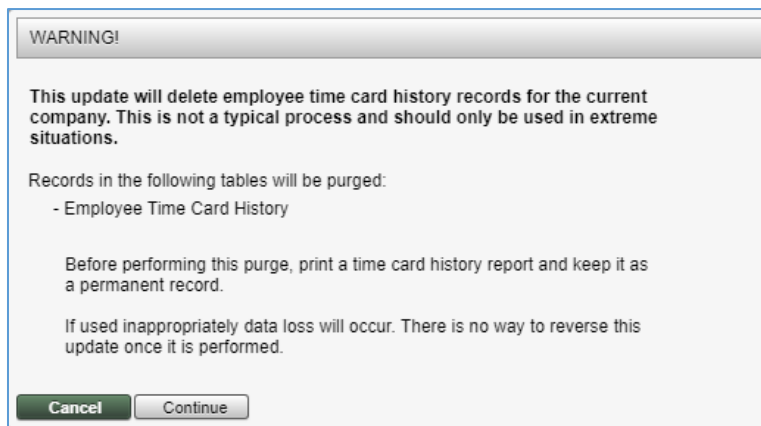
- Warning Message with Cancel as the primary option
- Warning Message repeated on the start screen

- Options have moved down on the Site Map

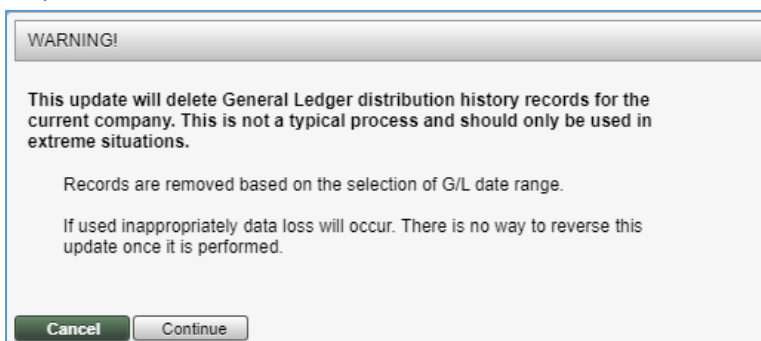
PR Employee Earnings History Purge Warnings



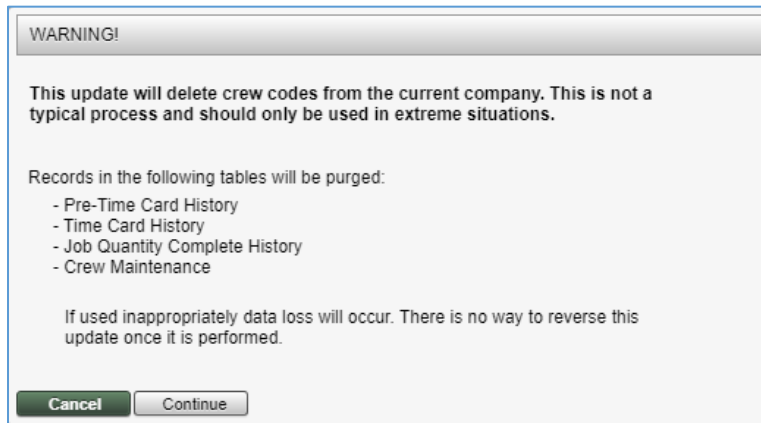
PR Purge Time Card History



PR Purge G/L History



PR Purge Crew Numbers



PR Employee File Rebuild Moved to Utilities

The Employee File Rebuild from Error Recovery has been moved to Payroll | Utilities. This rebuild uses tables throughout the system and should only be performed when all other users are logged out. Confirm that this workstation is the only one currently logged into Spectrum prior to proceeding.

This screen requires a level 9 of security category ER (Error Recovery) to access.

PR Delete Employee from Current Company

In earlier versions, the Employee Delete from Payroll Error Recovery function purged only selected employee tables. In this release, it has been renamed, enhanced and has been moved to Payroll | Utilities.

Enhancements in this newly titled Delete Employee from Current Company include:

Current Pay Cycle Validation

When the user accesses the utility, the system checks to determine if a pay cycle is currently in process. This utility can only be used once the pay cycle has been completed.

Stronger Warnings

The start screen provides additional warnings and an explanation of what the utility does. It alerts the user that this is not a typical process and should only be performed in extreme situations.

Final Authorization to Purge

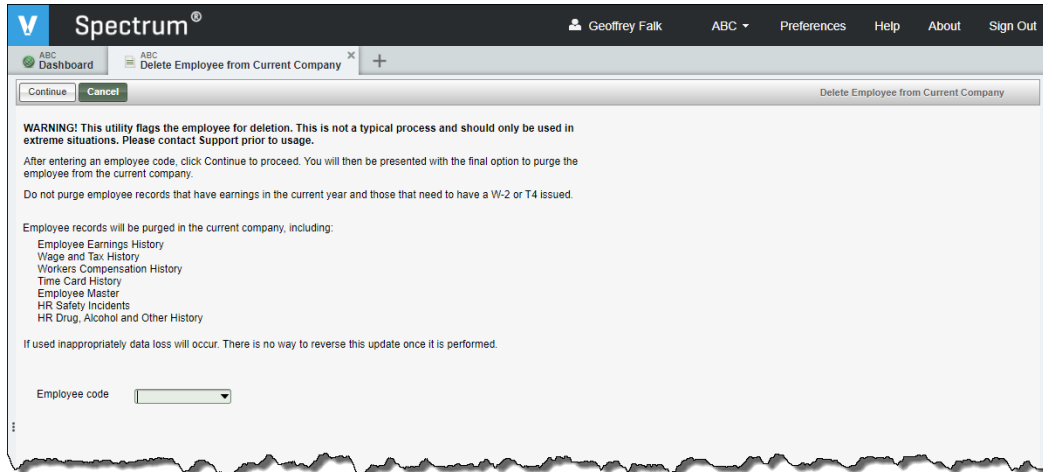
After entering an employee code, click Continue to proceed. A final option to purge will be presented before data is deleted.

Moved from Error Recovery to Payroll | Utilities

This option is available with appropriate security.

Error Recovery Security Required

This screen requires a level 9 of security category ER (Error Recovery) to see the option as well as to access it. The option **will not** appear on the Site Map when the user does not have security access.



PTE Timecard Signature and Notes

The portal now allows the Administrator to enter approval text that will appear in the app. The employee can approve or contest the timecard records. The employee can also enter notes directly into the app.

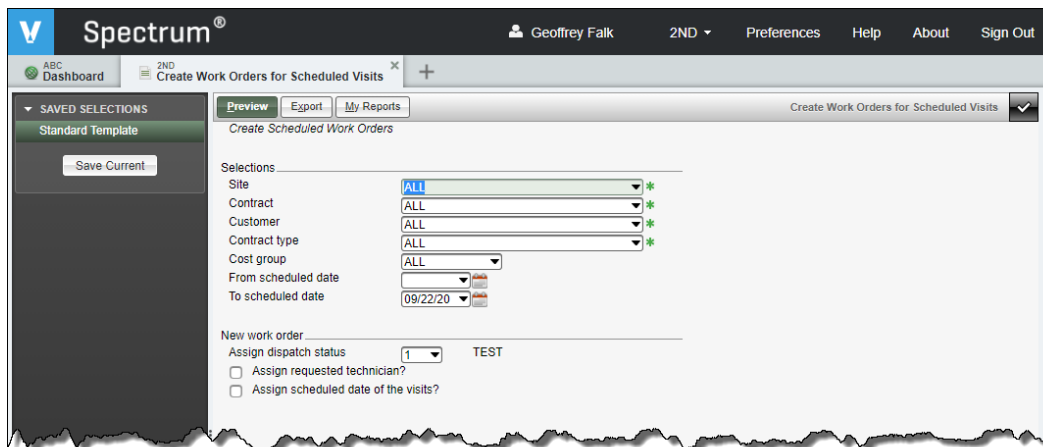
The signature and notes display in the portal.

PTE Job-to-Date Quantity in Unit Quantities

Job-to-Date quantity information has been added to Unit Quantities section of the app.

SC Additional Selections on Create Work Orders

TOP SUGGESTION BOX REQUEST!



To assist larger service departments in managing their workloads, the following selections have been added to the Create Work Orders for Scheduled Visits:

- Contract
- Customer

- Contract type
- Cost group

SC Cost Group Selections on Contract Billing Processing

TOP SUGGESTION BOX REQUEST!

Cost groups have been added to the Contract Billing Processing screen to assist service departments that use cost centers to control their workload.

SC Cost Group Selections on Earned Revenue Processing

TOP SUGGESTION BOX REQUEST!

Cost groups have been added to the Earned Revenue Processing screen to assist service departments that use cost centers to control their workload.

SC Cost Group Selections on Reverse Earned Revenue Processing

TOP SUGGESTION BOX REQUEST!

Cost groups have been added to the Reverse Earned Revenue Processing screen to assist service departments that use cost centers to control their workload.

STM Materials Page Added to Service Tech Mobile

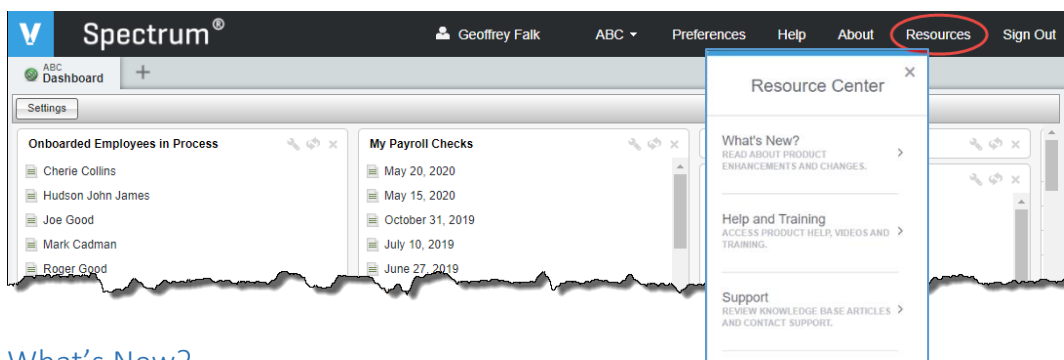
The Materials page is now available in Service Tech Mobile. Download the update from Apples App Store and Google Play Store.

STM Purchase Orders Page Added to Service Tech Mobile

The Purchase Orders Page is now available in Service Tech Mobile. Download the update from Apples App Store and Google Play Store.

SYS Resources

A new option, titled Resources, has been added to the Spectrum Toolbar. Use this to navigate to additional Spectrum and Viewpoint Resources.



What's New?

Follow this link to learn about new product enhancements and changes.

[Help and Training](#)

Use this link to access product help, videos and training.

[Support](#)

Single click to review knowledge base articles and contact Support.

[Miscellaneous Notes](#)

The Nelco website will be available in December.