



Swiss[®] Salary **Learn**

Update 5063.000

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More information: docs.swissalary.ch



Swiss[®]
Salary

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1 Update 5063.000 | User

1.1 Update 5063.000 | Introduction

Dear SwissSalary Customers,
Dear SwissSalary Partners,

We present to you the manual for SwissSalary **Update 5063.000** of May 30, 2024. It also includes documentation on QualityReleases from 5062.001 to 5062.004. Your SwissSalary will be up to date after installing this update. In addition to great new features and improvements in SwissSalary, we have also further developed our bi-directional interfaces to the existing add-ons SwissSalary Direct, SwissSalary EasyRapport, SwissSalary Budget and KLE.

The ELM 4.0 transmission standard will be removed in the update to SwissSalary version 5063.000. An automatic switch to the transmission standard 5.0 was already made with Update 5062.000; it was previously possible to switch to 4.0 manually.

Swissdec 5.1 is automatically activated in the payroll master data during update for customers who have currently activated Swissdec 4.0 manually.

We sent out an overview of the most important new features in our newsletter; they can also be found at any time in the Magazine on our website at [swissalary.ch](https://www.swissalary.ch).

IMPORTANT NOTES

Basic requirement

If your Dynamics 365 partner has made company-specific changes to your SwissSalary standard objects, you must contact your Dynamics 365 partner prior to installing the objects. Please make sure that you always work with the latest version. We support the latest and most recent SwissSalary version.

Comprehensive update with all available objects

The main updates will be released in April/May and October/November similar to the Microsoft Dynamics 365 Business Central release cycle.

SwissSalary 365 | Microsoft Dynamics 365 Business Central | Microsoft SaaS-Cloud

The SwissSalary 365 app is always up-to-date with the latest versions of Microsoft Dynamics 365 Business Central and SwissSalary. The app is updated with just a few clicks directly via the admin center (see our video tutorial). Starting from the 5057.000 release, the video is also displayed directly in the Role Center under [Product Videos](#).

Das SwissSalary **Update 5063.000** ist für folgende Business Central-Versionen (onPrem/private Cloud) verfügbar:

- o Dynamics 365 Business Central 2024 Wave 1 - Version 24 (AL)
- o Dynamics 365 Business Central 2023 Wave 2 - Version 23 (AL)
- o Dynamics 365 Business Central 2023 Wave 1 - Version 22 (AL)

SwissSalary **Update 5063.000** is available for the Business Central versions (onPrem/private cloud) below:

- o Dynamics 365 Business Central 2024 Wave 1 – version 24 (AL)
- o Dynamics 365 Business Central 2023 Wave 2 – version 23 (AL)
- o Dynamics 365 Business Central 2023 Wave 1 – version 22 (AL)

We always support the latest version in SaaS (public cloud by Microsoft). Therefore, we release SwissSalary Update 5063.000 for BC 24. Please note that the existing sandboxes must also be migrated for 5063.000 to be installed.

Legal changes and mandatory bug fixes will be provided for these versions in the form of **Release**

5061.200:

As already announced in the last update manuals, this release will not be provided for the versions below:

- o Dynamics 365 Business Central Spring' 19 – version 14 (C/AL)
- o Dynamics 365 Business Central Fall' 18 – version 13 (C/AL)
- o Dynamics NAV 2018
- o Dynamics NAV 2017

. They are noted accordingly in this manual. Technical or content-related innovations for these versions will not be implemented in SwissSalary. To update your environment, please contact your NAV/Dynamics365 partner.

Customers are responsible for implementing SwissSalary versions. Our Support or Your Dynamics365 partner can provide help if needed. With SwissSalary365 (Cloud), customers are also responsible for this and SwissSalary does not carry out any updates automatically.

Stay tuned for Release 5063.000.

Your SwissSalary Team

1.2 Downgrade | 5061.200

Release 5061.200 is published for the NAV / BC versions for which full updates are no longer available from 5062.000 but for which individual tasks are still provided.

These are:

Dynamics 365 Business Central Spring' 19 - Version 14 (C/AL)
Dynamics 365 Business Central Fall' 18 - Version 13 (C/AL)
Dynamics NAV 2018
Dynamics NAV 2017

The following tasks are included in 5061.200 in this manual:

Reports

- 12390 AHV Summary | Pensioners error

Administration

- 12613 SUVA customer number | New format allowed
- 12661 Swissdec 4.0 | Functionality removed

Salary declaration | Swissdec 5.0

- 12465 Declare Salary | FAK allowance
- 12445 Declare Salary | FAK
- 12400 Declare Salary | Income tax

Payroll

-
- 10975 Income tax | Multiple rate changes in the cantons with annual billing

1.3 Employees

1.3.1 Employee | Column headings

Task #12601 | 5063.000

The field descriptions for function title and department description were no longer translated but instead displayed with English terms. This was corrected.

1.3.2 Employee | Personnel loans column

Task #11883 | 5063.000

The 'Personnel loans' column now also can be displayed in the Employee list.

1.3.3 Employee | Dossier fact box

Task #12549 | 5063.000

The most current document appears in the first place in the 'Employee dossier' fact box in the Employee card.

1.3.4 Employee | Copying Employee No.

Task #12467 | 5063.000

When Copy Employee is used, several Employee No. can now be included in the filter and copied to the desired client.

1.3.5 Employee template | Social security

Task #12645 | 5063.000

When a Employee template is used, the defined social insurance including benefits are acquired.

1.3.6 Employee card | BVG calculation date

Task #12477 | 5062.004

A wage change via TimeMachine should trigger a fictitious BVG wage recalculation. The corresponding message stating the time by which this should be done was no longer displayed correctly due to a change. This has been fixed and when a wage change is recorded in TimeMachine, the date to which the BVG calculation date should be set can be selected again.

1.3.7 Employee card | Employment date change

Task #12571 | 5063.000

If Employment date is imported into SwissSalary from an interface, this field is always adjusted. If you change the Employment date field manually in the Employee card, a message will still appear asking whether the field should actually be changed.

1.3.8 Employee card | Liechtenstein citizenship

Task #12469 | 5063.000

Employees of Liechtenstein citizenship do not need a residence permit to live in Switzerland; the information messages have been adjusted accordingly.

1.3.9 Employee card | Allocation Group change

Task #12302 | 5063.000

When Allocation Group is changed, a message appears if there are open entries in payroll journal reporting of another Allocation Group. These reports must be transferred to a report journal of the newly assigned Allocation Group.

1.3.10 Employee card | Maximum value for disability

Task #12564 | 5063.000

The maximum value for the Disability field has been increased to 100.00.

1.3.11 Employee card | TimeMachine Entries and Allocated Salary change

Task #9028 | 5063.000

When Allocated Salary are changed, a TimeMachine entry is checked for availability; if so, an information message appears.

For Excel import: Information message is displayed for each Employee No., but changes are still made. The values are not recalculated and must be re-entered for recalculation.

1.3.12 Employee | Origin type of Allocated Salary

Task #12442 | 5063.000

The Origin type column can now be displayed in Allocated Salary and assigned manually. It will be included in the Salary items during Salary accounting process.

1.3.13 Employee | Payroll list

Task #12494 | 5062.004

Up until now, the resignation date could be entered retrospectively in the Employee card and the resignation date was also written in the person's Payroll list. If the resignation date was deleted or changed, it was not updated in the Payroll list.

We have improved this function. The new behavior is as follows:

- If the resignation date is entered retrospectively in the Employee card, the resignation date will also be entered during pay process in the Payroll list that corresponds to the resignation date period.
Example: If a resignation date of March 31, 2024 is entered in the Employee card in May 2024, the resignation date will be entered in the Payroll list for the pay process of March 2024.
- If the resignation date is changed retrospectively in the Employee card, the resignation date will be updated in the Payroll list.
Examples:
 - If a resignation date of March 31, 2024 is entered in the Employee card in May 2024, the resignation date will also be entered in the Payroll list for the March 2024 pay process.
 - If the resignation date is changed from March 31, 2024 to February 29, 2024, the resignation date will be deleted from the Payroll list for the March 2024 pay process and entered in the February 2024 pay process.
 - If the resignation date is changed from March 31, 2024 to March 16, 2024, the resignation date of March 31, 2024 in the pay process list for the March 2024 pay process will be updated to March 16, 2024.
- If the resignation date is deleted from the Employee card, it cannot be automatically recognized whether it is a re-recruitment or whether the resignation date is deleted because of incorrect input. In this case, a message "Are you recording a re-recruitment?" appears that must be confirmed with "Yes" or "No".
 - Yes: The resignation date in the Payroll list will be changed.
 - No: The resignation date in the Payroll list will be deleted.
Tip: If "No" is incorrectly answered to this message, the deleted resignation date can be viewed in the employee's history and re-entered in the Employee card.
- If the resignation date is changed in the Employee card in the future, the resignation date will be deleted from the pay process list. The future resignation date is saved in the pay process list during the pay process of the corresponding period via wage processing.

Important: If the resignation date is changed retrospectively, no subsequent calculations (e.g. 13th monthly salary) will be made. This function is used to ensure that the employment period is correctly output in year-end reports (wage statement, AHV wage statement, etc.) and reported via ELM. We would like to point out that, whenever possible, the recruitment and resignation dates are to be entered correctly in the Employee card before pay process processing. Retrospective resignation dates should only be entered in the Employee card in exceptional cases.

1.3.14 Employee | Payroll List Salary Amount Employment %

Task #12595 | 5063.000

The "Salary Amount Employment %" field can be displayed in the Payroll List via Personalize.

1.3.15 Employee | Salary Entry

Task #12566 | 5063.000

Payroll area can be displayed in the Salary entry view.

1.3.16 Employee | Open TimeMachine and items

Task #12648 | 5063.000

Employees' personal details in the 'TimeMachine items' and 'Open TimeMachine items' lists are now displayed as a factbox on the right-hand side.

1.3.17 Employee Dossier | Preview

Task #12437 | 5063.000

Employee dossier now features a PDF document preview.

1.3.18 Personal Dossier | Deletion of multiple documents

Task #12550 | 5063.000

A function is now available to delete several documents in the personal dossiers. If these documents have been loaded into SwissSalary Direct, they are also deleted in Direct when they are deleted. Various filters are available for the function so that the documents can also be deleted for several people at the same time.

1.3.19 Personnel statistics assignment | Resignation date

Task #12646 | 5063.000

When personnel statistics is set up, the employees assigned to the groups or unassigned employees can be displayed. The payroll accounting recruitment date and resignation date can be displayed in this view. Up until now, payroll accounting recruitment date was displayed in the Resignation date column. This has been corrected.

1.3.20 Years of service calculation | Error message for recruitment date of January 31

Task #12559 | 5063.000

An error message was displayed for employees with a recruitment date of January 31, xxxx when settling the February pay process due to the years of service calculation. This has been fixed now.

1.3.21 Years of service calculation | Back payment

Task #12557 | 5063.000

For employees who have resigned and receive back payments in a month following the resignation, years of service are shown as of the resignation date.

1.4 Payroll

1.4.1 Close balances | Open date range

Task #12532 | 5063.000

The 'Close balances' function can now also be used during the year. The date can be chosen by user, which was a mandatory requirement for some industries (e.g., construction industry as of April 30, 20xx). As before, a pay process is created automatically via the 'Close balances' function.

1.4.2 Payroll | Import table validation

Task #12019 | 5063.000

The message regarding data records in the EasyRapport import table has been optimized. It no longer appears during down-payment process or test billing.

1.4.3 Payroll | Pro rata calculation warning

Task #12503 | 5063.000

Up until now, if a pro rata calculation was waived for recruitment during the month, a warning was displayed. This was disabled.

1.4.4 Payroll Journal | Meldung Belegdatum

Task #12522 | 5063.000

The warning in the Payroll Journal can be deactivated via Boolean. This notification can be reactivated at any time under "My Settings".

1.4.5 Payroll Journal | 13th Payday

Task #12518 | 5063.000

For the 13th Payday, both functions '13th/14th Payday calculation' and 'Payment of the 13th/14th Payday' overwrote the 'Employment Date of Payroll' field filter value with the work date value. This trouble has been eliminated.

1.4.6 Payroll Journal | Dimension value

Task #12666 | 5063.000

If a different project number is selected on a row that has already been entered in the Payroll Journal, the associated cost center or cost unit will also be adjusted.

1.4.7 Income tax | Multiple rate changes in the cantons with annual billing

Task #10975 | 5062.003 [5061.103]

If several rate changes were processed during the year using the same rate codes for persons subject to Income tax in cantons with annual calculation, this led to incorrect calculations of deductions or values already deducted.

This bug has been fixed. Rate assignment that has already been used can now also be processed in cantons with annual calculation.

1.4.8 BVG calculation | Change during the month

Task #12669 | 5063.000

BVG calculation in the event of wage changes during the month and percents by position have been improved.

1.4.9 Payroll | Conversion error message

Task #10338 | 5063.000

The 'form.RunModal' error message always occurs when hours cannot be converted to days or days cannot be converted to hours. The presentation of this message was very cryptic and it was difficult to understand where the incorrect data set could be. This has now been adjusted and the error message is now more meaningful.

1.4.10 Payroll | Missing salary types

Task #12484 | 5062.004

If the insurance premiums (UVGZ, KTG, ...) were entirely borne by the employer, an error message was still displayed if no employee deduction salary type was stored. This bug has been fixed.

1.4.11 Marginal salary | Multiple employment periods

Task #12443 | 5063.000

If the low wage is exceeded, the AHV salary calculation covers the entire year, even if recruitments and resignations during the year have been recorded.

1.4.12 Marginal salary | ALV contributions compensation

Task #12487 | 5063.000

Contributions were taken into account if the ALV salary was negative for people who were allocated marginal salary for AHV and ALV. This has been corrected and the calculation for ALV is the same as for AHV.

1.4.13 Payment after resignation | Calculation of hourly wage percents by position

Task #12409 | 5062.003

Percents by position worked for hourly wage earners can be calculated monthly in relation to the monthly parts. An error message appeared when additional payments were made. This has been solved.

1.4.14 TabBoard | Shortcut for new row

Task #12337 | 5062.002

A new row can be inserted in TapBoard using the ALT + N keyboard shortcut.

1.4.15 Fibu Journal | Wrong description

Task #12373 | 5062.001

Default accounting texts for FIBU, KORE and projects were translated incorrectly due to automatic translations in the release. Again, we have now corrected this.

When pay processes are posted in the FIBU, KORE/BBA and also in the Projects module, individual bookings are posted with the default collective wage posting text \$L-xx\$. Where xx stands for the payroll area code.

1.4.16 Cancel Payroll | Confirmation text

Task #12622 | 5063.000

The message for pay process cancellation has been adjusted. This message now always appears: 'Are you sure that you want to cancel pay process XY of XX.XX.XX for Allocation Group YZ?'

1.4.17 Post Payroll | FIBU interface

Task #12388 | 5062.002

If an active FIBU interface is stored in the payroll area, the error message below was displayed when the second pay process was posted within the same month: Record already exists in the table blob link. Identifying fields and values: Table No.='3009120',Unique Record ID='xx',Sequence No.='x'
This error message was eliminated.

1.4.18 Post Payroll | Entries in record journals

Task #12416 | 5063.000

If a pay process is posted and there are still rows in the accounting, project or cost recording journal, a corresponding message appears. You can now click the 'View journal' button during reporting. The affected record journal is opened directly.

1.4.19 Project bookings | Cost unit transfer

Task #12091 | 5063.000

A dimension value can be assigned to a project. If a project to which a dimension value is assigned is selected in the SwissSalary reporting journal row, the dimension value is filled into the Debit cost center and/or Debit cost unit field. Up until now, the cost unit to be charged was not passed on to the Project registration row in the journal. We have now fixed this.

1.5 Reports

1.5.1 Paycheck | Company language

Task #12446 | 5062.003

When a Paycheck is being prepared, the "Company language" field can be activated on the request page. If it was activated, the Paycheck was still prepared based on the employee's language code. We have corrected this. If the company language is activated on the request page, the payroll will be prepared again based on the company language selected in the Payroll tab of the Payroll Setup.

1.5.2 Paycheck | Printing Employment and Resignation Date

Task #7481 | 5063.000

You can choose in the Paycheck tab of the Payroll Setup whether Employment as well as Resignation Date should be printed on the Paycheck. Printing is always done in the month of the date and in the period it is archived in the Payroll List.

1.5.3 Paycheck | Translations

Task #12381 | 5062.001

Balancing and monthly reporting on the payslip were incorrectly translated due to automatic translations in the release. Again, we have now corrected this.

1.5.4 Paycheck | Accounting Supervisor email text

Task #12547 | 5063.000

The "Accounting Supervisor email" field can now also be translated in Administration --> Payroll Setup --> Related --> Translation --> General.

1.5.5 Payment order (detailed) | SWIFT Code

Task #12376 | 5063.000

Complete SWIFT code is printed on the detailed payment order.

1.5.6 Salary certificate | Missing language code

Task #12529 | 5063.000

If the language code was not filled in for the employee, their Salary certificate could not be created. In this case, the Salary certificate is created taking company language into account.

1.5.7 Salary certificate | Salary type with %

Task #12655 | 5063.000

Salary type names are now printed with % characters and amount in the salary certificate under para 15, 'Comments', if the relevant Boolean is activated. Resulting salary types must be enabled separately to be printed on the salary certificate.

Input: Only affects the CodeUnit for creating texts on the salary certificate.

1.5.8 Salary certificate | Income tax deduction

Task #12244 | 5062.003

Amounts can now be taken into account for salary certificate number 12 by setting up a social fund.

1.5.9 Salary certificate PDF | Company fields

Task #12513 | 5063.000

Company address (sender) determination was adjusted according to PDF during salary certificate preparation so that it works the same way as for the salary certificate report.

1.5.10 Salary certificate | Archive

Task #12471 | 5063.000

The 'Archive' flag has been removed from salary certificate and is only displayed when the Construction app is used.

1.5.11 Personnel dimension | Display of decimal values

Task #12546 | 5063.000

Three selection fields are available when Personnel dimension report is being created. If fields with decimal places like Percents by position or salary rate amount were selected, they were not displayed correctly. This has been fixed.

1.5.12 Income tax statement for Liechtenstein | Year layout adjustment

Task #12307 | 5062.002

The Income tax statement for Liechtenstein report has been adjusted. When a year is selected, the values below are now shown per person:

- Date of employment / Billing period
- Gross wage total
- Taxable wage
- Employment tax deduction

1.5.13 Income tax statement for Liechtenstein | Form adjustment

Task #12733 | 5063.000

Income tax statement for Liechtenstein has been revised as follows:

- Income tax deduction total in quarterly accounts was corrected (in the case of multiple payments per month, income tax that had already been settled was not taken into account). Year-end statement was prepared correctly every time.
- The 'Total gross salary' column was removed (does not correspond to the sample form).
- The 'Taxable salary' column was renamed to 'Gross wage total' (according to the sample form).
- The 'Income tax deduction' column was renamed to 'Income tax deduction' (according to the sample form).

By the next Update 5064.000 (November 2024), the accounting layout will be adapted to the latest requirements of the Liechtenstein sample form.

1.5.14 AHV Summary | Pensioners error

Task #12390 | 5062.002 [5061.102]

If the wage was calculated with update 5061.000 for an individual that has reached retirement age, the AHV Summary could not be created with update 5062.001. The message below appeared: The "" value cannot be evaluated in the Boolean type.
This error message was eliminated.

1.5.15 EasyRapport card | Sort key

Task #12654 | 5063.000

A sort key is now available when the EasyRapport card is prepared.

1.5.16 Bar code labels | Docuware

Task #12372 | 5062.002

Concerns only the customers using SwissSalary Construction.
The bar code was missing during bar code labels creation for Docuware. This was corrected.

1.5.17 Employee List Holding | Vacancies

Task #12386 | 5063.000

Budget vacancy functions are no longer taken into account in the Employee List Holding.

1.5.18 Salary type statistics | Error message

Task #12368 | 5062.001

When salary type statistics was created using SwissSalary version 5062.000, an error message appeared caused by an invalid reference. This has been solved.

1.5.19 Salary Statistic | Salary type filter

Task #12414 | 5063.000

Salary statistics can be output from the Employee list via the Analysis action.
The value data there has been improved with filters for individual salary types.

1.5.20 Remuneration change log | Active employees option

Task #9294 | 5063.000

The 'Remuneration change log' report has been expanded with the 'All active employees' option.
The list can be created as an overview of all wages including the history.

1.5.21 Salary history | Data in Excel

Task #12359 | 5063.000

The remuneration change log (salary history) assessment in Excel format can be generated as follows:
Search / Remuneration change log / Report layout = select Excel / Download / Open file / Enable editing

Only when editing is activated will the exported data be displayed correctly.

1.5.22 Mail Merge | Error message

Task #12368 | 5062.001

When a form letter was created using SwissSalary version 5062.000, an error message appeared. This has been solved.

1.5.23 Mail Merge | Employment Date for Payroll

Task #12367 | 5063.000

The 'Employment Date for Payroll' merge field is filled correctly.

1.5.24 Mail Merge | File name

Task #12312 | 5063.000

When form letters are prepared, Employee N° now appears at the beginning of file name to enable Word files import via 'File ZIP archive import'. Document template name also appears in file name.

1.5.25 Short letter | Error message

Task #12368 | 5062.001

When a short letter was created with SwissSalary version 5062.000, an error message appeared due to an invalid reference. This could be solved.

1.5.26 Different evaluations | Selection field function

Task #12369 | 5062.001

Salary type list A4H or A4Q is also generated if the function name is selected in selection field 1, although the "Function" field is empty in the employee's Employee card. This report is also issued for an active/resigned employee and for an employee being hired/in the process of resignation.

When an evaluation with selection field function was created using SwissSalary version 5062.000, an error message appeared. This is the case if a Employee number has no function or a function that is currently invalid. This has been solved.

1.5.27 Employee Card | Sort key

Task #11836 | 5063.000

Search terms can now be selected as sort keys for creating Employee Card.

1.5.28 Different evaluations | Percents by position heading instead of entry

Task #12364 | 5062.001

Due to automatic translations in the release, column headings were displayed incorrectly in various reports (e.g., Monthly WT accounting, Excel export of personal wage account). Again, we have now corrected this.

1.5.29 Department head list | Supervisor first names

Task #12415 | 5063.000

First name can now also be displayed as a separate column in the Department head list.

1.5.30 Organization | Output as PDF

Task #11391 | 5063.000

The organization chart can now also be saved as an image/PDF.

1.5.31 BESTA | Reporting quarter preview

Task #12447 | 5063.000

When employment statistics is prepared via "Preview", the due date is now evaluated correctly. The correct date is displayed in the reporting and the previous quarter.

1.5.32 BESTA | Total number of employees

Task #12545 | 5063.000

When the employment statistics is prepared, persons with the lowest job percentage category are correctly added up in the total number of employees.

1.6 Salary declaration

1.6.1 Community N° | Postcodes for multiple locations

Task #12540 | 5062.004

If several Community N° are available for selection when entering the zip code for a place of work, the correct Community N° can be selected.

The name of the Community is correct. However, the wrong place ID / Community N° was drawn; only the first Community N° on the selection list was drawn. This has now been corrected.

The tax Community for employees subject to income tax was not affected by this error and was always transmitted correctly.

1.6.2 Declare Salary | Workplace municipal number

Task #12426 | 5062.003

An error message appeared during wage reporting if the municipal number for workplace was missing. It is mandatory for Swissdec 5.0 reports.

The municipality number is usually recorded automatically. If it is missing, the postal code can be reassigned in workplaces and the municipal number will then be recorded automatically.

1.6.3 Declare Salary | EMA

Task #12509 | 5063.000

When the AHV contribution obligation is reached, such persons must be included in the EMA report to the AHV compensation fund in January.

An error occurred if the person had previously resigned. This bug has been fixed.

1.6.4 Declare Salary | FAK

Task #12445 | 5062.003 [5061.103]

If a FAK office is responsible for all FAK cantons and employees have changed the FAK canton during the year due to a workplace change, wage items from the last FAK canton in the FAK domain were only exported during submission.

This bug has been fixed.

1.6.5 Declare Salary | FAK allowance

Task #12465 | 5063.000 | [5061.200]

Child allowances paid after a person resigns from the company, which are related to the current fiscal year, are now correctly transmitted via ELM.

1.6.6 Declare Salary | Income tax

Task #12400 | 5062.003 [5061.103]

Depending on the situation, when the Income tax was transmitted, corrections were not transmitted. It particularly affected retroactive Income tax obligation activations or retroactive canton changes in which the newly responsible cantons were not processed correctly.

The display in the electronic report and on IT statement reports for cantons with monthly accounting and IT statements for cantons with annual accounting have been revised.

1.6.7 ELM V5.0 | Municipal number

Task #12370 | 5062.001

If a Swiss address is stored for the workplace, the "CH" country code is automatically stored. Now we search for the appropriate municipal number using the new filter. If you work abroad, the municipal number is no longer required.

1.7 Interfaces

1.7.1 Hospital Statistics | New fields

Task #12501 | 5062.004

The "Employment relationship" and "Employment contract" statistics fields are now included in hospital statistics. They are displayed in positions 12 and 13.

Field 12: Temporary personnel (1 = Yes, 2 = No)

Field 13: Type of contract (1 = Permanent contract, 2 = Temporary contract, 3 = Other)

1.7.2 Import from Excel | File selection

Task #12429 | 5062.003

The Excel import functionality allowed Excel files to be imported to be uploaded by means of drag & drop. Browsing with Windows Explorer was no longer possible. It has been fixed with this QualityRelease.

1.7.3 Open interface | Skipping of missing employees

Task #12430 | 5062.003

A file containing reporting lines of employees from multiple clients can be imported into the open interface. The external employees are skipped in the file and only the report rows of the employees belonging to the client are imported. The message after the import displays the number of report rows imported or skipped.

1.7.4 rexx | Employee card transfer

Task #12504 | 5063.000

The changes are no longer accepted automatically if the person

- falls under the Reason for resignation filter and
- falls under the Allocation Group filter and
- has not yet resigned and
- the entry contains no errors.

For the changes to be accepted automatically, the settings below must be adjusted.

Click the drop-down menu next to 'Smartport' on the home page in SwissSalary and select the 'Settings' menu item. Store in the 'Automatically accept source code filter' field the source code specified in the rexx interface settings.

1.7.5 SmartPort | Scheme

Task #12408 | 5063.000

XML scheme (XSD) was updated and expanded to map the structure of the SmartPort interface correctly. The XSD scheme with all fields can be obtained from our Support at support@swissalary.ch.

1.8 Administration

1.8.1 Swissdec 4.0 | Functionality removed

Task #12661 | 5063.000 [5061.200]

The submission is now only possible with the Swissdec 5.0 or 5.1 support. The Swissdec 4.0 option can no longer be selected.

Fields and options no longer relevant to Swissdec 5.0 or 5.1 processing will be hidden.

These are selection fields for salary type statistics or 'IT details' or the 'Company car regulations' field on the personnel card. They have no relevance for the transmission of statistics or wage statement creation.

1.8.2 SwissSalary document management | Setup

Task #12565 | 5063.000

SwissSalary document management settings can now be opened via Setup.

1.8.3 Allocation Group | Financial interface

Task #12427 | 5062.003

The financial interface field in the Allocation Group area could no longer be left blank. This has now been corrected.

1.8.4 Missing labels | Actions

Task #12371 | 5062.001

Individual actions in the menu ribbon had empty or incorrect translations. Several pages were affected. We have now corrected this.

1.8.5 SUVA customer number | New format allowed

Task #12613 | 5063.000 | [5061.200]

Format verification for Customer No. / Insurer No. and contract number during SUVA recording has been expanded. This is for the purpose of new number formats recording.

1.8.6 Payroll Setup | Field names

Task #12432 | 5063.000

The reference age field name has been renamed in the Payroll Setup.

1.8.7 Payroll Setup | Field names for the BVG domain

Task #12433 | 5063.000

The "Retirement age formula" field in the BVG rate table (Rate table) was changed to "Reference age".

1.8.8 Payroll Setup BVG domain | Age table

Task #12379 | [5061.100]

This task is included in the new objects of November 24, 2023. This adjustment does not affect customers using 5062.000.

For customers who had their BVG deductions calculated, in some cases there were missing calculations for savings contributions with 5061.100. This error does not affect customers using 5062.000.

The missing contributions are due to an entry 'from age 0' in the age table. If 0 is entered for employer and employee contribution in a From age 0 row, the formula for the retirement age has been inserted there.

For the AHV 21 reform, a new column was added to calculate the retirement age. As a rule, starting from retirement the contributions are recorded as 0 and the formula for the retirement age is correctly inserted in this row. The additionally entered formula in rows with age 0 is incorrect.

If you only import update 5061.100 now, the row will be deleted. If you have already imported the update, you must delete this row manually.

1.8.9 Participations | Development

Task #12425 | 5063.000

The Participations functionality is hidden because this action has not been fully developed and therefore cannot be used. According to Swissdec, it is not a specified module, so it will not be fully implemented.

1.9 KLE

1.9.1 KLE | SUA certificate

Task #12266 | 5063.000

Smaller companies that had few KLE cases to report (<1 case within 6 weeks) often had their SUA certificate expire. As soon as a new case was to be reported, it could not be transmitted because the SUA process had to be started anew (including regular mail). Under new Task queue, all open KLE cases are now synchronized at least once per week. If there is no open KLE case, a no-data synchronization with the insurance company is even carried out to prevent certificate expiration. The same happens also manually when a user clicks the 'Submit open cases' button in the KLE case list. The intention is to ensure no SUA certificate expiration in the future.

1.9.2 KLE | Button display

Task #12334 | 5063.000

When an illness report is entered, the corresponding buttons not needed in this case are disabled. With an illness report, for example, this is the case for the 'Accident description' field.

1.9.3 KLE | Allocation Group filter

Task #12573 | 5063.000

If a user is assigned a Allocation Group filter in the SwissSalary user settings, this user can only view the KLE cases and insurance claims of persons matching the filter criteria assigned to this user. The Allocation Group currently recorded in the Employee card is decisive.

1.9.4 KLE | Daily allowance calculation of future pay rises

Task #12444 | 5062.003

When the Annual wage story is sent, KLE takes into account all entries in the TimeMachine.

1.9.5 KLE | Daily allowance statement display

Task #12630 | 5063.000

The display of the Daily allowance statement was optimized.

The statement can be issued with or without personal details.

If you choose without personal details, the invoice number (ID defined by the insurer), the incident date, the claim number, the KLE case number and the type of accident will be shown in the billing header.

If you choose with personal details, the person's personnel No., name and AHV number are also included.

1.9.6 KLE | Sending insurance case card via Direct

Task #12463 | 5063.000

For a reported KLE case, medical record and accident card can be sent via Direct.

1.9.7 KLE | Personnel address

Task #12406 | 5063.000

So that the receiving insurance company can communicate with the person involved in the accident via current home address, the current home address stored in the Employee card is always transmitted with KLE, even if the home address may have been different at the time of the accident.

1.9.8 KLE | Person's in charge contact details

Task #12591 | 5063.000

If the "Responsible", "Responsible Person Phone No." and "Responsible Person Email" fields are filled in the General tab in the Allocation Group, an EndUserNotification will now be sent to the insurance company in the XML request file.

1.9.9 KLE | Messages

Task #12584 | 5063.000

Text with up to 1024 characters can be displayed in the messages for a KLE Case.

1.9.10 KLE | Invoice

Task #12419 | 5063.000

With Update 5063, documents having the Invoice type can now be submitted with KLE again.

1.9.11 KLE | Submit case

Task #12335 | 5063.000

If SwissSalary has identified several KLE cases that need to be submitted, the message below will be displayed in the KLE cases: "The insurer reports that other KLE cases should be synchronized". However, in cases with open stories from SwissSalary that need to be submitted, the message "There are unreported stories" is displayed.

1.9.12 KLE | Change of status

Task #12603 | 5063.000

If the KLE case status remains Reported because, for example, only the UVG and not the UVGZ stories could be submitted, the status will automatically be set to Reported with the next synchronization if the UVGZ stories were previously deleted. A new, independent KLE case can subsequently be created to report the UVGZ case.

1.9.13 KLE | Delete case

Task #12407 | 5063.000

In certain cases, an accident is rejected by Suva. In such a case, Suva writes 'Rejected!' in the "Insurance Case ID" field. Upon the start of the submission process, the Rejected! ones are deleted automatically.

1.9.14 KLE | Deleting stories

Task #12604 | 5063.000

If a KLE case has the "created" status, the associated stories will also be deleted when the declaration in the UVG and/or in the UVGZ area is deleted.

1.9.15 KLE | Synchronization overview

Task #12305 | 5063.000

You can synchronize all cases in the KLE case list with a single click. If this function is selected, all open cases will be synchronized and every synchronized case will be displayed.

1.10 SwissSalary Budget

1.10.1 SwissSalary Budget | Departments

Task #12361 | 5062.002

To date, no positions could be recorded in departments with special characters in their name. This is now possible.

1.10.2 SwissSalary Budget | Department filter in structure

Task #12431 | 5062.003

If the department filter in the structure was empty, no items were displayed in the budget. This was corrected.

1.10.3 SwissSalary Budget | Allocation Group in structure

Task #12537 | 5063.000

When a new budget structure is created, the first Allocation Group is automatically loaded from the legitimate area if a user has a Allocation Group set in the SwissSalary user settings.

1.10.4 SwissSalary Budget | Budget items filter

Task #12574 | 5063.000

To make analysis in budget easier, unrestricted users can now have filters or system filter options displayed on budget items.

1.10.5 SwissSalary Budget | Posting Group filter

Task #12363 | 5063.000

The posting group is now also taken into account as a filter for displaying budget items.

1.10.6 SwissSalary Budget | Positions tab

Task #12397 | 5063.000

From now on, there are various filterable columns for SwissSalary Budget in the "Positions" tab (workplace, department, job, salary class). In addition, the "Project" column in the "Budget structure" tab has been renamed to "Position".

1.10.7 SwissSalary Budget | Totaling field length

Task #12541 | 5063.000

The character limit for budget totaling has been removed. Now, it can be totalized with the maximum number of 2048 characters.

1.10.8 SwissSalary Budget | FTE Budgeting

Task #12197 | 5063.000

Planned FTEs can now also be adjusted directly in the budget matrix.

1.11 SwissSalary EasyRapport

1.11.1 EasyRapport | Cross-client transfer

Task #12410 | 5063.000

A distinction is made between uploading and downloading for EasyRapport transfer. All clients' data was previously downloaded during download.

This could lead to problems if permissions were restricted. Therefore, cross-client transfer is turned off and carried out completely separately for both uploads and downloads.

1.11.2 EasyRapport Sync | Blob items in table data record

Task #12378 | 5062.001

There was an error during row import from EasyRapport that the data already existed. This could now be solved.

1.11.3 EasyRapport transfer | Company language

Task #12485 | 5063.000

EasyRapport transfer was no longer possible if the company language and the user language were different. This was corrected.

1.12 SwissSalary Direct

1.12.1 SwissSalary Direct | Documents to multiple people warning

Task #12500 | 5063.000

If a document is sent to several people using the Send Document function, a message will display that needs to be confirmed. It also points out that the document is being delivered to multiple recipients.

1.12.2 SwissSalary Direct | Salary certificate

Task #2512 | 5062.004

If "Send documents to all employees" is selected in the SwissSalary Direct settings, the salary statements for all persons are also placed in the Direct and the personnel dossier. Previously, the salary statement was only uploaded to SwissSalary Direct and thus to the personnel dossier for registered persons.

1.12.3 SwissSalary Direct | Wrong payslip file name

Task #12375 | 5062.001

File name was displayed incorrectly in SwissSalary Direct. This has been corrected and payslips show the month name again. Documents already uploaded prior to installing 5062.001 would have to be deleted and re-uploaded.

To do this, contact your Dynamics 365 partner or SwissSalary Support.

1.12.4 SwissSalary Direct | Report card

Task #12284 | 5062.001

Sending of report cards using SwissSalary Direct in the SaaS cloud resulted in a timeout and was canceled. Sending had already worked with the "Print" function, but not with "Preview". The "Preview" function can no longer be used during sending and a corresponding message appears.

1.12.5 SwissSalary Direct | Special character

Task #12350 | 5063.000

If emails in Employee cards contain special characters during the first synchronization with SwissSalary Direct, the error message below is displayed: 'The email field of employee no. XX contains invalid characters.'

1.12.6 SwissSalary Direct | De-registration

Task #12344 | 5063.000

Previously, when a person was de-registered from SwissSalary Direct, the complete SwissSalary Direct synchronization had to be carried out for successful completion. If the date was deleted in the Last sync on field, the Rollout date would be removed and the text block with the registration code would reappear. This has been corrected and synchronization is now sufficient without removing the date.

1.13 SwissSalary Construction

1.13.1 SwissSalary Construction | Internal ARGE re-invoicing

Task #12417 | 5062.003

Concerns only the customers using SwissSalary Construction (formerly SwissSalary BAU)
The ARGE re-invoicing rates were no longer taken into account correctly. This has been corrected and the rates are applied correctly again.

1.13.2 SwissSalary Construction | Itemized ARGE statement

Task #12422 | 5062.003

Concerns only the customers using SwissSalary Construction (formerly SwissSalary BAU)
The Itemized ARGE Statement report generated an error when being opened. This is now fixed and the report can be opened.

1.13.3 SwissSalary Construction | Cross-client cost centers

Task #12418 | 5062.003

Only affects customers with SwissSalary Construction (formerly SwS Construction)

Since the migration to the cloud, cross-client cost centers were no longer transferred to EasyRapport after posting payroll.

It was possible to report on cross-client cost centers, but these were no longer visible after posting payroll and transferring them to EasyRapport. This visually generates minus hours that do not exist according to the reporting card and salary entry.

This has been resolved.

1.13.4 SwissSalary Construction | Dimension value

Task #12671 | 5063.000

Concerns only the customers using SwissSalary Construction (formerly SwS Bau)

Dimension values can be entered again, automatic comparison works again.

1.13.5 SwissSalary Construction | Rate

Task #12659 | 5063.000

The Rate page is now displayed as a list and no longer as a card.

1.13.6 SwissSalary Construction | Disbursement for LMV hours

Task #12619 | 5063.000

The new default report is only available in the Construction app and should help construction customers, so that the accrued overtime balance is disbursed as of April 30 with 125%.

It is important that April wages are settled first. This is the only way the system knows the overtime balance for April.

1.13.7 Parifonds | Reimbursement document

Task #11951 | 5063.000

The Parifonds reimbursement document is now available with a sort key and correct, currently valid bank details.

1.14 Technical partner and customer information

1.14.1 Page review | Last updated

Task #12464 | 5063.000

The 'SystemModified at' and 'Systemmodified by' table fields are now recorded in page review. This means that the last change can be displayed on the relevant pages/reports.

- AllocatedSalary.Page.al
- EmployedYears.Page.al
- EmployeeCard.Page.al
- EmployeeDimensions.Page.al
- EmployeeList.Page.al
- EmployeeStatistic.Page.al
- ManagementRapportJournal.Page.al
- SalaryTypeCard.Page.al
- SalaryTypes.Page.al
- TimeMaschine.Page.al
- TimeMaschineEntries.Page.al
- TimeMaschineList.Page.al
- ESMPIncard.Page.al

1.14.2 New event | SwS import from Excel

Task #12478 | 5063.000

There is a new event publisher 'OnBeforeModifyJournalLine' for the 'Journal rows from Excel' report. This way, extensions to change payroll journal rows are allowed before they are inserted into the table and displayed in the report journal.

1.14.3 Bulk Report Management | New EventSubscriber

Task #12470 | 5063.000

Certain EventPublishers have been replaced in the SwS Bulk Report Management code unit with new events that send report parameters in the form of var. A partner can now override these parameters with an EventSubscriber. The events below have been replaced. If you use one of these events, please switch to the new event:

- OnBeforeSaveManagementRapportAsPdf -> OnBeforeSaveManagementRapport
- OnBeforeSavePaycheckAsPdf -> OnBeforeSavePaycheck
- OnBeforeSaveReportAsPdf -> OnBeforeSaveEmployeeReport

1.14.4 Fibu interface | Standard adjustment

Task #12515 | 5062.004

It is now possible to integrate customer-specific FIBU export interfaces (PTE) with events. This means that the entire code base does not need to be copied and adjusted, only the desired areas. If the SwissSalary base is developed further, these user developments are automatically transferred or integrated. To set this up, a new "Custom (Text)" option can be selected in the Allocation Group. If the "Custom (Text)" is selected and no suitable PTE is created, an empty file will be generated.

1.14.5 REST API | Entity extension

Task #12428 | 5062.003

REST API has been extended by the entity "SWS Blob Link" so that ISO XML files can be retrieved and further processed via REST.

2 Update 5063.000 | Systemadmin

2.1 SwissSalary-Website | Objects and app download

I work in SaaS cloud from Microsoft Dynamics 365 Business Central (online). Do I have to download the objects from the website and install?

No.

You will only find on our website the objects and apps for the installed versions (onPremise). You can update your app directly within the SaaS solution.

We continuously check customer-specific adjustments (so-called PTE, per-tenant extensions) before each update. They should be available as usual without any further steps at your end, even after the update, and you do not need to [update them](#).

How is SwissSalary customer area accessed (SwissSalary onPrem customers and partners only)?

Go to our website at <https://swissalary.ch> Click Login at the top right.

Log in using your company-specific login data (email). Then click the Update NAV button (SwissSalary BC/NAV customers) or the Update BAU button (SwissSalary BAU customers).

You will be offered the latest Updates and Hotfixes for download (SwissSalary onPrem).

Which documents can you additionally download?

In addition to the latest Update, the latest Quality Releases (if any) can be downloaded and installed in SwissSalary. This way, your object status will always be up to date (recommended).

The library of current manuals and further information about SwissSalary is constantly updated, expanded and published at <https://learn.swissalary.ch/EN/>.

Furthermore, we have created a helpful reference portal in the form of the [SwissSalary Frequently Asked Questions \(FAQ\)](#) page, which we continue to expand.

How is a file downloaded from the Internet?

Click the corresponding icon with your mouse and the download starts (you will find the file under "Downloads"):

Will I be informed about improvements to SwissSalary?

We communicate on various channels, e.g. Viva Engage (SwissSalary Partner Network), via newsletter, website and via news in the role center.

Do you have questions about our website or downloading?

Please contact your Dynamics 365 partner, email us at support@swissalary.ch or call our hotline +41 (0)31 / 950 07 77. We will be pleased to advise you!

2.2 Importing/updating Updates and Hotfixes

These explanations only concern customers with installed versions (onPremise).

1. Download the objects according to the descriptions in the previous chapter.

IMPORTANT NOTES:

- The User Manual can be found at <https://learn.swissalary.ch/EN/>.
- Please check with your Dynamics 365 partner whether you have made any custom adjustments. They would be lost after an update without prior backup.

TIP:

We recommend that you make a backup before the update. It is usually unnecessary, but makes sense for security reasons.

2. Unzip the app/object file using WinZip.

3. Open Dynamics 365 Business Central / Microsoft Dynamics NAV and switch to the Object Designer by pressing Shift+F12 (Extras -> Object Designer).

You can see now all objects available for you in the BC/NAV database.

4. Go to File -> Import.

5. Enter the path to your saved APP/FOB file. The system will try now to import the file.

6. You will see info now that MUST be confirmed with OK or No.

NOTE:

ALWAYS open the import worksheet!

7. The import worksheet will open.

IMPORTANT NOTE:

It is IMPERATIVE that you click REPLACE ALL here! Finally, click OK to continue the import process!

The following message also appears in the RTC client (starting from NAV 2015) (confirm it by selecting "Force"):

Synchronization is automatically requested in the RTC client (starting from NAV 2015), please confirm this message with YES:

8. The objects are now imported into your database. After a successful installation, you will get the following completion message:

IMPORTANT NOTES:

We recommend that you compile the SwissSalary objects after import (F11). Please set a filter (F7) in the version list to **SwS*** and make sure that **"All"** is selected on the left-hand side. Please note that it is preferable to restart the BC/NAV service. As a rule, only the administrator with relevant permissions can do it (please execute during off-hours only when no users are logged in anymore).

IMPORTANT:

We do NOT provide any app import support in the onPrem environment. Please directly contact your Dynamics 365 partner.

9. Update Process

After a successful import of the objects, please switch to the SwissSalary main menu or Role Center.

Click the Employee menu item (Employee card). The system begins the update process automatically. A person with administrator rights should only open the main Update menu. Otherwise, the update will fail. Once the process is completed successfully, you will receive a completion message.

You will find an update history under Role Center -> Organization where all successfully imported update versions are logged.

The update process must be performed after every Update / Quality Release.

In the Excel table, you will see the objects that have been newly created or modified. These can be found together with Objects in the protected partner area on our website.

Explanation of the types:

- 1 = Table
- 3 = Report
- 4 = Dataport
- 5 = Codeunit
- 6 = XMLport
- 7 = MenuSuite
- 8 = Page
- 9 = Query

If you have any questions, please contact your Dynamics 365 partner or our support directly.

2.3 Authorization rates

From 5062.000, the SWS authorization sets are automatically updated directly with the update migration process. There is no "NAV permissions" section in the SwissSalary Organization anymore and the store update for the sets of rights no longer has to be carried out manually. You can identify an SWS set of rights delivered by us by the "System" type. They can no longer be adjusted by a SUPER user. If you want to create your own access privileges, you must copy a set of rights, make changes to the copied set of rights and assign them to relevant users (we have always recommended this procedure). A copied set of rights is automatically assigned the "Custom" type.

Code so far	New authorization rate	Name	Art	Extension name	Description
<i>SWS-BUDGET-EDIT</i>	SWS BUDGET PROCESS	Budget - Edit and Process	System	SwissSalary 365	This set of rights is used to create budget structures, FTE budgets, budgets in amounts and forecasts.
<i>SWS-BUDGET-READ</i>	SWS BUDGET READ	Read Budget Data	System	SwissSalary 365	This set of rights is used to read budget structures, FTE budgets, budgets in amounts and forecasts.
<i>SWS-BUDGET-SETUP</i>	SWS BUDGET SETUP	Admin. Budget Module	System	SwissSalary 365	This set of rights is used for setup in the SwissSalary Budget module. Classical set of rights for wage administrators.
<i>SWS-EE EDIT</i>	SWS PROCESS	Employee Edit and Run Payroll	System	SwissSalary 365	This set of rights is the classical assignment for payroll personnel members that need to use all features of payroll accounting. The user can edit, delete, enter data in SwissSalary; however s/he cannot change Payroll setup.
<i>SWS-EE READ</i>	SWS READ	Read Employee Data	System	SwissSalary 365	Similar to the SWS PROCESS set of rights, with the exception that data can be viewed only, and not changed. Read-only rights.
<i>SWS-HR EDIT</i>	SWS HR PROCESS	Edit HR (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. A user with this set of rights can modify, delete and enter data in PIS.
<i>SWS-HR READ</i>	SWS HR READ	Read HR (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. Read-only rights.
<i>SWS-HR SETUP</i>	SWS HR SETUP	Admin.HR Module (Dynamics 365)	System	SwissSalary 365	PIS (Personal Information System) add-on module. A user with this set of rights can change settings in PIS. Classical HR wage administrator.
<i>SWS-KLE EDIT</i>	SWS KLE PROCESS	KLE - Edit and Process	System	SwissSalary 365	KLE cases can be edited with this set of rights. If this set of rights is assigned, the SWS PROCESS or SWS READ set of rights must also be assigned.
<i>SWS-KLE READ</i>	SWS KLE READ	Read KLE Data	System	SwissSalary 365	Similar to the SWS-KLE PROCESS set of rights, with the exception that data can be viewed only, and not changed. Read-only rights.

<i>SWS-ALL</i>	SWS LOGIN	Login Permissions	System	SwissSalary 365	The only set of rights that must be assigned to every SwissSalary user. The 'Wage accounting' feature requires that the system should obtain 'indirect' information about all clients (license check, how many employees are currently accounted for in the entire database. Of course, no data of the restricted clients can be seen.
<i>SWS-POST</i>	SWS POSTING	Payroll Posting	System	SwissSalary 365	In accordance with the SOX guidelines, payroll staff member is not allowed to 'post wages'. This set of rights can be assigned to a user in the FIBU that is exclusively responsible for wage posting. IMPORTANT: Of course, this user must also be activated in SwissSalary under Setup -> Setup -> Users or in the RTC version under SwissSalary Administration -> SwissSalary User Setup.
<i>SWS-ST EDIT</i>	SWS SALARY TYPE EDIT	Edit Salary Types	System	SwissSalary 365	Full access for editing salary types. With this set of rights, salary types can be created, modified and deleted.
<i>SWS-SETUP</i>	SWS SETUP	Admin. SwS Module	System	SwissSalary 365	Classic set of rights for wage administrators.
<i>SWS-SETUP-LIGHT</i>	SWS SETUP LIGHT	Admin. SwS Without User Setup	System	SwissSalary 365	The same set of rights as SWS-SETUP with the restriction that SwissSalary users cannot be changed.