



Update 5065.000

Date: 21.05.2025
More information: learn.swissalary.ch



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Date of change: 21.05.2025

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1 Update 5065.000 | User

1.1 Update 5065.000 | Introduction

Dear SwissSalary customers
Dear SwissSalary partners

We are pleased to present the manual for SwissSalary **Update 5065.000** dated May 15, 2025. The manual also contains the tasks from quality releases 5064.001 to 5064.003. After installing this Update, you will be up to date with the latest version of SwissSalary. In addition to great new features and improvements in SwissSalary, we have also further developed our bi-directional interfaces to our existing add-ons SwissSalary Direct, SwissSalary EasyRapport, SwissSalary Budget and KLE.

We have sent out an overview of the most important changes with our newsletter and you can find them at any time on our website [swisssalary.ch](https://www.swisssalary.ch) in the magazine.

IMPORTANT NOTES

❑ Basic requirements

If company-specific changes have been made to your SwissSalary standard objects by your Dynamics 365 partner, you must contact your Dynamics 365 partner before installing the objects. Please ensure that you are always working with the latest version. We support the latest and the most recent SwissSalary version.

❑ Complete update with all available objects

The main Updates are published around April/May and October/November, in line with the Microsoft Dynamics 365 Business Central release cycle.

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

The SwissSalary 365 app is always based on the latest version of Microsoft Dynamics 365 Business Central and the latest SwissSalary version. The app can be updated with just a few clicks directly via the Admin Center (see our training video). Since release 5057.000, the video is also displayed directly in the role center in the product videos.

The SwissSalary Update **5065.000** is available for the following Business Central versions (onPrem/private Cloud)

- o Dynamics 365 Business Central 2025 Wave 1 - Version 26 (AL)
- o Dynamics 365 Business Central 2024 Wave 2 - Version 25 (AL)
- o Dynamics 365 Business Central 2024 Wave 1 - Version 24 (AL)

In SaaS (Public Cloud from Microsoft) we always support the latest version, so we publish the SwissSalary update 5065.000 for BC 26. Please note that existing sandboxes must also be migrated so that 5065.000 can be installed.

Legal changes and mandatory bug fixes will be released as release 5061.400 for versions

- 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

made available. These are marked accordingly in this manual. Technical or content-related innovations for these versions are not implemented in SwissSalary. To update your environment, please contact your

NAV/Dynamics365 partner. Please note that a version (5061.500) for these versions will be published for the last time with the fall release 2025. After that, no more legal adjustments will be implemented for these versions.

The implementation of the SwissSalary versions is the responsibility of the customer. Our support or your Dynamics365 partner can assist you if required. With SwissSalary365 (Cloud), this responsibility also lies with the customer and SwissSalary does not carry out updates automatically.

You can look forward to the 5065.000 release.

Your SwissSalary Team

1.2 Benefits | New possibilities

| 5065.000

The Payroll Setup, in particular the social insurance domain, is being revised. In a first step, the KTG and UVGZ domains were transferred to Benefits with 5064.000 due to the comparable set-up conditions.

With the 5065.000 Update, the UVG domain will now be transferred to Benefits.

The comprehensive documentation on Benefits can be found in a separate manual, which will be continuously supplemented and updated. The implementation of the Benefits project will affect several areas in SwissSalary. In addition to the changes to the setup in Payroll Setup, it will also affect salary types, employee social insurance, Salar declaration and annual statements.

With Benefit, the accrual of premium rates and insurance contracts will be possible. Stay tuned for further developments.

1.3 Downgrade | 5061.400

Release 5061.400 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:

- 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

New tasks and subsequent tasks from 5061.301 to 5061.303 are included in this manual:

Payroll run

- 13001 Manual Income tax correction | Domain of origin [5061.301]

Reports

- 5490 Payroll IT canton | Total reference commission [5061.400]

Salary Declaration

- 13002 Salary declaration | Income tax [5061.301]
- Teleworking French cross-border commuters [5061.302]
- 12620 Cross-border commuters Italy selection [5061.400]
- 5183 Cross-border commuters France | Percentage of remote work field

-
- 5182 Cross-border commuters France | Telework [5065.000]
 - 5057 Cross-border commuters Italy | Expand check

KLE

4884 KLE | Daily allowances date [5061.302]

1.4 Employee

1.4.1 Employee card | Tax ID Country of Residence

Task #12621 | 5064.001

The Tax ID Country of Residence has new requirements. These are now checked at the time of registration. The exact requirements are set out in the corresponding Swissdec guidelines.

1.4.2 Employee card | Resignation Date in the past

Task #3643 | 5064.001

If reasons for Resignation Date are entered on the Employee card, a leaving date could not be retroactively entered in a period with a payroll run. This error has been fixed.

1.4.3 Employee card | Cross-border commuters France Remote work

Task #5183 | 5065.000

According to the agreement with France for French cross-border commuters, the “percentage of remote work” may not exceed 40% (96 of 240 days for full-time employment). However, it must still be possible to record this in SwissSalary.

1.4.4 Employee card | Delete fields Imposta alla fonte

Task #3974 | 5065.000

If a person is no longer subject to Income tax, the entry in the 'Tariff' and 'Canton' fields can no longer be deleted. This led to error messages in the ELM reports. The release from the Income tax obligation may only be resolved via the 'Subject to Income tax' field.

1.4.5 Employee card | Income tax TimeMachine

Task #3943 | 5065.000

If a change is entered via a TimeMachine field on the Employee card in the Income tax tab without the content reflecting an actual change, a warning appears. This is because such mutations can affect the Income tax calculation.

A data mutation should either be made directly on the Employee card if it is valid from the next payroll run or only be stored in TimeMachine. When processing via TimeMachine, the Employee card should be left in

its previous state. When the payroll run is settled, the TimeMachine data is automatically transferred to the Employee card.

1.4.6 Personal dossier | Dossier ZIP archive export

Task #3725 | 5065.000

Task #5252 | 5065.000

The documents from the dossier can now also be exported. To do this, open the “SwissSalary document management setup” and select the document types you wish to export. You can select several document types with “Select more”. A request page opens via “Actions / Export as zip archive” and the selected document types are transferred to the filter of the request page. You can also set filters for the personnel master data in the request page. You can start the export with “OK”.

- If no filter is set in the request page, all documents from all employees are exported.
- If a filter is set on document types in the request page, this document type is exported for all employees.
- If a filter is set on the HR master data in the request page, all document types are exported for this employee.
- If a filter is set to document types and personnel master in the request page, the selected document types are exported for these employees.

A zip file with the name “Content” is created, in which there is a separate zip file for the various document types.

- The name of the zip files contains the code and the description of the document type
- The name of the files within the individual zip files is [personnel no.]_[file name].

1.4.7 Employee | Bank

Task #5369 | 5065.000

Zip code and city are now labeled separately on the Employee Bank card. This is intended to make it easier to enter that the values are selected in the underlying postcode/city table.

1.4.8 Employee | Bank mutate

Task #3674 | 5065.000

When a change is made to an existing Personal Bank, only the relevant fields are automatically deleted. For example, when changing from 'Bank' to 'Bank abroad', the IBAN is retained and only the clearing number is deleted.

1.4.9 Employee card | Insurance and Benefit Coverage personalize

Task #5127 | 5065.000

If you click on ALL Insurance and Benefit Coverage in the Employee list, the fields Last name, First name, Date of birth as well as Employment Date and Resignation Date are now displayed and can be filtered according to these. The fields can be hidden with Personalize. You can also choose between the All and Active views.

1.4.10 Employee | Infobox employee dossier

Task #4130 | 5065.000

The most recent document is displayed at the top of the Employee list in the Employee dossier info box.

1.4.11 Allocated Salary | Error when selecting salary type

Task #3598 | 5064.001

The entry of a salary type with dimension assignment ran into an error. This has been fixed.

1.4.12 Employee | Employee Dimensions

Task #3910 | 5065.000

The columns 'Employment Date for Payroll' and 'Resignation date' can now be displayed.

1.4.13 Employee | Alternative address card

Task #4188 | 5065.000

The alternative address card is often used for emergency contacts. There is now a new "Relationship" field on this card. The relationship can be entered in this field.

This shows the relationship between the person with the alternative address and the employee.

1.4.14 Employee | Employee Reports

Task #5236 | 5064.003

When outputting the personnel management report 'Employee card', some areas were displayed overlapping and were therefore not readable. This has been corrected.

1.4.15 Employee | Employee History

Task #3922 | 5065.000

Newer fields in the Tax at Source tab were not displayed on the history report. This has been corrected.

1.4.16 Personnel templates | Fields expanded

Task #3673 | 5064.001

Some fields on the Employee card that were only relevant with Swissdec 4.0 have been removed. This led to an error message when using personnel templates, which could be rectified.

1.5 Payroll

1.5.1 TapBoard | Batch Entry | from- and to time

Task #4679 | 5065.000

From/to times can now also be recorded in the TapBoard using batch entry from and to time

1.5.2 Time-shifted salary processing | 13th month's salary departure

Task #5272 | 5064.003

No Paycheck could be generated for employees who had left the company as long as the missing items from EasyRapport had not yet been imported into SwissSalary. This error has now been fixed. A calculation of the difference between Scheduled Time and Total Compensated Time as well as the payment of the 13th month's salary, vacation and flexitime credits can be generated even without time items.

1.5.3 Net wage compensation | different settings

Task #4836 | 5065.000

We have now combined the calculation logic for "Net salary compensation" and "Gross for net (BfN)" in the "Net salary compensation" function. This calculation method can be used in practice for insurance daily allowances and special payments (long-service bonus, bonus).

The following settings can be made in the "Net wage compensation" field for each individual salary type:

- Deactivated: No net wage adjustment is made for this salary type.
- Activated with Income tax: If this option is selected, the employer pays the employee's social security contributions and withholding tax deductions. Our calculation is carried out by iterating the social security bases and the withholding tax base.

Note: In most cases, this option is selected for insurance daily allowances. This is because the employee should not receive a higher payment as a result of the daily allowance processing than if no daily allowance is processed. To achieve this result, the withholding tax base must be taken into account for persons subject to QST.

- Activated without Income tax: If this option is selected, the employer only pays the employee's social security contributions. This calculation is made by iterating the social security bases.

How can the calculation be checked?

- You can proceed as follows for insurance daily allowances:

Create a test payroll for the employee without daily allowance corrections or make a note of the net wage amount. Then enter the daily allowance correction and the daily allowance salary type and create another test payroll run. Salary type 1160 is now automatically displayed in the gross wage area with a minus amount. The net wage amount should be the same as without the daily allowance correction. Please note that this net wage adjustment only makes sense if the daily allowances remain in the company and are therefore processed via a daily allowance wage type and a correction daily allowance wage type. If daily allowances are forwarded, a separate daily allowance wage type without net wage adjustment should be used.

- Special payments (e.g. long-service award or bonus). The employer pays the social security contributions and income tax.
 1. Create a test statement without a special payment and note the amount paid out.
 2. For example, report CHF 1'000.00 with a salary type in which the option "Activated with income tax" is selected in the "Net wage compensation" field.
 3. Create a test payroll again. The payout amount must now match the payout amount noted in step 1 plus the special payment amount.
- Special payments (e.g. long-service award or bonus). The employer only pays the social security contributions
 1. Use a salary type in which the "Net wage compensation" field is deactivated. Create a test payroll run for a person subject to QST with which, for example, a total of CHF 1'000.00 is settled and make a note of the amount of all social insurance contributions.
 2. For example, report CHF 1'000.00 with a salary type in which the option "Activated without withholding tax" is selected in the "Net wage compensation" field.
 3. Create a test payroll again. The amount paid out now differs by approximately the amount of social security contributions noted in step 1.

Note: The higher the special payment, the greater the difference between the amounts from steps 1 and 3 may be. This is because the amount of the net salary compensation is itself also subject to social security and withholding tax. This increases the IT rate-determining income and the tax progression, which in turn influences the percentage of withholding tax rates.

Up to update 5064.000, the offset amount (net wage compensation) was only shown when processing insurance daily allowances. As of update 5064.000, the offset amount for special payments (BfN) is also shown with the same salary type and included in the social security/income tax amount approaches. This results in better traceability.

1.5.4 Payroll | Note Provisional Payment

Task #4069 | 5064.003

If a definitive payroll run is created for a Allocation Group, a check is made to see whether a payroll run on account has been created in the last three months. If this is the case, a warning is displayed: 'You usually create a payroll run on account for this Allocation Group. Do you want to settle without a payment on account this time?'

1.5.5 Payroll | Warning date

Task #3944 | 5065.000

In Update 5063.000, a plausibility check for the change of the to-date when creating a payroll run was implemented.

The customer is now notified of the adjustment with a warning when both data records 'From and/or To date' are changed. Furthermore, all relevant fields are now displayed as standard. This means that the additional navigation ('Show more') is no longer necessary.

1.5.6 Payroll | County without IT Commission

Task #3930 | 5065.000

The system now checks whether a IT commission has been entered for the relevant canton when accounting for persons subject to Income tax. If not, a warning is displayed.

1.5.7 Payroll | Payment of vacation pay from journals

Task #4771 | 5065.000

If vacation pay is reported with an amount and at the same time the same salary type is reported with CHF 0.00, both reports are taken into account. The line with CHF 0.00 is taken into account first and then the line with the recorded amount.

1.5.8 Payroll | Reference age women in Liechtenstein

Task #4829 | 5064.002

For Liechtenstein, the gradual increase in Switzerland's reference age for women was previously taken into account.

This has now been rectified. If the reference age for women is set to 65 in the Payroll Setup, the AHV and ALV deductions are deducted in full as long as they have not yet reached the age of 65. As soon as the age of 65 is reached, neither the AHV nor the ALV deductions are made. No allowance is taken into account either.

1.5.9 Payroll | Journal error message in posting

Task #3647 | 5064.001

If several people have TimeMachine entries in the 'Job percentage' or 'Work group' fields, an error occurred when calculating or calculating wages on account. This has been fixed.

1.5.10 Payroll | Net payroll accounting

Task #5301 | 5064.003

For persons of reference age with net salary accounting, an excessively high value was calculated for net salary offsetting from the second payroll month onwards. This has been corrected.

1.5.11 ISO file | address structure

Task #5628 | 5065.000

An adjustment has been made to the address structure so that addresses with special characters or spaces are displayed correctly.

1.5.12 Cancel Payroll | Error message Date

Task #5152 | 5064.003

When canceling a Payroll, an error message was sometimes displayed due to an incorrect date constellation. This error in connection with the BVG change field has been fixed.

1.5.13 Payroll | Payment file

Task # | 5064.001

In some cases, the payment file was rejected because a grouping with payment information was not exported correctly. This error has been fixed.

1.5.14 Reporting | Error message Authorization

Task #3714 | 5064.001

In certain situations, a message regarding a lack of authorization to edit salary types appeared when a text was entered in the "Wage type no." field in the reporting journal. This message no longer appears.

1.5.15 Payroll | Income tax rate-determining value

Task #4821 | 5065.000

For persons subject to income tax on an hourly salary with additional income and entry/exit during the month, the monthly parts for calculating the income tax bases and rates are reduced to the days of employment.

1.5.16 Income tax | Rate determination Back payments in one month

Task #3964 | 5065.000

For persons subject to income tax, an incorrect rate-determining value was calculated in cantons with annual calculation if two payroll runs for payments after leaving with aperiodic benefits were processed on the same payroll date. This error has been corrected.

1.5.17 Income tax | Rate-determining value 0

Task #5248 | 5065.000

An error message was displayed during payroll accounting if the rate-determining wage was 0. This has been resolved. It is ensured that the persons are included in the wage report.

1.5.18 Income tax | Correction retroactive monthly cantons with additional Payroll run

Task #3939 | 5065.000

The calculation of retroactive rate changes for persons in cantons with monthly calculation and additional Payroll runs without benefits subject to withholding tax has been corrected.

1.5.19 Income tax | Correction retrospective annual cantons

Task #5366 | 5064.003

In cantons with annual calculation, no retroactive rate correction to January could be processed with the February payroll run. Likewise, no retroactive correction to the entry month could be processed with the second payroll run. This error has been corrected.

1.5.20 Income tax | Retroactive second correction Obligation

Task #3931 | 5065.000

If a person's income tax liability was deactivated retroactively and then reactivated retroactively in a subsequent month, this meant that the income tax deduction for one month was not taken into account. This has been corrected.

1.5.21 Manual Income tax correction | Domain of origin

Task #13001 | 5064.001

When manually reporting the Income tax correction salary types, the domain of origin column is filled in automatically.

1.5.22 Vacation pay provision | Leaving during the year

Task #5585 | 5065.000

In the case of departures during the year, the vacation pay provision was not correctly reduced after the vacation entitlement was reduced until the departure. This has been rectified.

1.6 Reports

1.6.1 Benefit | Evaluation

Task #4934 | 5064.002

Task #4842 | 5064.002

The benefit evaluation with display of persons and values has been further revised.

1.6.2 Benefit | Persons issue

Task #3740 | 5064.001

With 5064,000, the annual statement for the KTG and UVGZ is now issued in the Benefits Report. The fact that persons who do not show any salary entry for the corresponding domain in the selected period were also output was corrected.

The ELM transmission is not affected by this and only shows the persons with corresponding wage items.

1.6.3 Paycheck as PDF | Use of placeholders

Task #3903 | 5065.000

The Paycheck can be generated as a PDF document and saved in a ZIP file. The following new placeholders can be used to name the files:

- %Employee_LastName% = Last name of the employee
- %Employee_FirstName% = First name of the employee
- %PostingMonth% = Month of posting as a number
- %PostingMonthText% = Month of posting as text
- %PostingYear% = Year of the posting with 4 digits

1.6.4 Paycheck as PDF| Additional Text

Task #5080 | 5065.000

The additional text can now also be printed on the Paycheck using 'Download Paycheck as PDF'.

1.6.5 Paycheck | Print Employment/Resignation Date

Task #3983 | 5065.000

In the Payroll Setup in the Paycheck section, a separate selection can be made with regard to the printing of Employment and Resignation Date on the Paycheck. The data that is currently entered on the Employee card is printed. Previously, a printout was only made if it concerned the current month.

1.6.6 Payroll | Coin List

Task #3942 | 5065.000

When a user with a Allocation Group filter created the Coin list, the result differed whether the Coin list was viewed as a preview or printed directly. With preview, an error message "No access to employees without Allocation Group" appeared. This could be fixed.

1.6.7 Management Rapport | Additional Text

Task #3690 | 5065.000

An additional text can be selected, which is printed on the Management Rapport.

1.6.8 Salary certificate | Language Place of work

Task #13013 | 5064.001

The language code of the place of work is taken into account for the system texts when creating the salary certificate.

1.6.9 Salary certificate | Error message creation

Task #5072 | 5064.002

If salary certificate with several pages were created for a large number of employees, the message "Rendering output for the report failed and the following error occurred: Stream was too long." appeared. The salary certificate can now be prepared without this message.

1.6.10 Salary certificate | Comment texts

Task #4833 | 5064.002

With QualityRelease 5064.001, it was implemented that the language code of the place of work is decisive for the system texts on the salary certificate. This has now also been extended to salary types that are mentioned in the comments in paragraph 15.

1.6.11 Salary certificate | Round amounts

Task #4941 | 5064.002

The salary certificate (paper) may only show whole franc amounts. The figure 11 net salary, which is decisive for the tax return, must be commercially rounded to the nearest franc.

The recalculation from figure 1 to figure 11 resulted in individual cases in a rounding difference of +/- CHF 1.00, which was shown in figure 1. The rounding is now taken into account in figures 2 - 7.

As before, the centime amounts are transmitted to the tax authorities via a 2D barcode.

1.6.12 Salary certificate | Income tax deduction only

Task #5566 | 5065.000

If only a correction of the Income tax is processed for a person in a calendar year and the taxable salary is 0, a salary certificate can be called up.

However, transmission via ELM is not possible due to a predefined schema restriction.

1.6.13 Salary certificate | Field removed

Task #4983 | 5065.000

A small square was printed at the bottom right of the Salary certificate form, which is not provided for on the tax administration's template. This has therefore been removed.

1.6.14 Tax at Source/County | Total commission

Task #5490 | 5065.000

If the IT statement was created monthly for a canton with an annual calculation, the sum of the reference commission was not displayed correctly for tariff changes during the year.

1.6.15 Tax at Source confirmation | Values

Task #3959 | 5064.002

The Tax at Source confirmation for employees subject to Income tax has been completely revised.

The previous version was based on the ELM reports (XML); the new evaluation refers to the salary Entry actually posted and the Payroll list. The evaluation is mandatory for employees subject to Income tax in the canton of Geneva; for employees in the other 25 Income tax cantons, the submission is voluntary.

1.6.16 Tax at Source Confirmation | Preview

Task #4828 | 5064.002

The Tax at Source confirmation report was only output with "Send to PDF" and "Print" data. The report could not be created with "Preview". We have corrected this.

1.6.17 AHV exempt wages | Column headings

Task #4847 | 5065.000

On the report 'AHV-exempt wages', the fields AHV-exempt wages and ALV-exempt wages were not shown separately in the French and Italian languages. The fields are now displayed correctly.

1.6.18 List of absences | Column headings

Task #5310 | 5065.000

On the 'List of absences' report, the column headings are taken from the translations. If no translations are stored, the description is used.

1.6.19 Difference list | Employment and Resignation

Task #3981 | 5065.000

The "Difference list Scheduled Time/Total Compensated Time" report shows the complete data for employees with several entry and exit dates in the past periods.

1.6.20 Raise Salary List | Grouping

Task #12917 | 5064.001

The Raise Salary List can now also be created in the cloud according to the desired grouping.

1.6.21 Employee Salary Statement | Settlement date during the year

Task #5538 | 5065.000

The output of the values in the cross-year evaluation of the Employee Salary Statement due to the set payroll date has been corrected.

1.6.22 Employee Salary Statement | Preparation time

Task #5140 | 5065.000

The processing time of the report pers. Annual payroll account report has been optimized.

1.6.23 Employment Equipment | Error message

Task #13021 | 5064.001

The Employment Equipment report can be generated. The error message due to incorrect parameters has been fixed.

1.6.24 Income tax Liechtenstein | Excel

Task #12995 | 5064.001

The payroll list for the declaration of income tax in the Principality of Liechtenstein will be prepared as an Excel export from 2025 (tax year 2024). Previously, this was a complex report with the option of quarterly statements and a recapitulation per municipality.

From 01.01.2025 (for the 2024 tax year), the data will be transferred to Excel as an ePayroll and can then be uploaded directly to the tax administration's homepage.

1.6.25 Vacation list report | Divider function

Task #4774 | 5065.000

The function 'Divider hours / days' has been removed from the vacation list report.

1.6.26 Report Absence detail | Period

Task #3988 | 5065.000

The format of the 'Absence Detail (3009172, SwS Absence Detail)' report has been revised.

The period can now be entered dynamically. When entering the to-date, the from-date is automatically filled with +19 weeks and vice versa.

1.6.27 Income tax Liechtenstein | Address

Task #3882 | 5065.000

In Liechtenstein payroll tax accounting, a street name with special characters was not displayed correctly in the individual columns. This has been corrected.

1.6.28 Hospital statistics | Adjustments 2025

Task #3655 | 5064.001

The hospital statistics have changed for 2025. The requirements and new fields have been adopted.

1.7 Salary declaration

1.7.1 Declare salary | Benefit multiple contracts

Task #4859 | 5064.002

ELM declaration for benefits (KTG and UVGZ) again support multiple contracts for the same domain.

Customers with several UVGZ contracts can now carry out the notifications without manual intervention on the benefit declaration setup.

The various contracts no longer have to be reported individually, but can also be selected together and submitted with an ELM message.

1.7.2 Declare salary | IT rate-determining value Median salary

Task #3814 | 5064.002

When transmitting the income tax of persons with the category median salary, the current median salary of the IT canton is now taken into account as the rate-determining value in the transmission. If the rate-determining value in the salary run is higher than the median salary, the value actually applied is taken into account.

1.7.3 Swissdec | Cross-border commuter IT

Task #5316 | 5065.000

In the case of Italian cross-border commuters, the state now defines which must be reported once a year with the cross-border commuter declaration and which do not. The employees to be reported must be marked with the "Cross-border tax return" flag in the withholding tax section. Only these are then included in the cross-border commuter report.

The following conditions must be met for an employee to be included in the Italian cross-border commuter report:

- "QS canton": TI, GR or VS
- "Date of entry": after 17.07.2023
- "Country of departure": IT
- "Cross-border tax return": Yes

1.7.4 Border crossers Italy | Expand audit

Task #5057 | 5065.000 [5061.400]

Italian cross-border commuters are now included in the cross-border commuter report if a payroll run has been completed for this person in this period and the "Cross-border tax Declaration" flag is set. The entry date must be filled in for the employee to be entered in the cross-border commuter report.

The mandatory fields for Italian cross-border commuters are:

- 1) Country of departure
- 2) Place of birth
- 3) Date of entry
- 4) Cross-border tax return

The mandatory fields for French cross-border commuters are:

- 1.) Country of departure

1.7.5 Declare salary | Cross-border commuters Italy Selection

Task #12620 | 5064.001

In the case of Italian cross-border commuters, the state now defines which must be reported once a year with the cross-border commuter declaration and which do not. The employees to be reported must be marked with the "Cross-border tax Declaration" flag in the Income tax section. Only these are then included in the cross-border commuter report.

The following conditions must be met for an employee to be included in the cross-border commuter report for Italy:

- "QS canton": TI, GR or VS
- "Immigration Date": after 17.07.2023
- "Destination of Departure": IT
- "Cross-border tax Declaration": Yes

1.7.6 Declare salary | Subscription commission

Task #13002 | 5064.001

The XML has been adjusted so that the subscription commission is also taken into account in the event of retroactive termination of the income tax obligation.

1.7.7 Declare salary | Infobox Contract

Task #3766 | 5064.001

The field length for the info box and contract information has been extended.

1.7.8 Declare salary | Format ID

Task #4827 | 5064.002

For a replacement notification, the notification ID reported by the canton is saved in a new format to ensure processing by the canton.

1.7.9 Declare salary | Statistic FSO

Task #5412 | 5065.000

In 'Declare salary', the 'Statistics' option has been renamed 'Statistics FSO'. This clarifies which statistics are involved. Further information on the scope of the statistics report can be found in the Swissdec guidelines 5.0 under <https://www.swissdec.ch/elm>.

1.8 Interfaces

1.8.1 SAP Business One | Excel-based

Task #5071 | 5064.003

An Excel-based (.xlsx) financial accounting interface for SAP Business One is now available.

1.8.2 Logib | Trainings

Task #5239 | 5065.000

The corresponding code was missing in the Logib evaluation for employees with the assigned education 'Higher Vocational Education Master' or 'Higher Vocational Education Bachelor'. This has been corrected.

1.8.3 UKA|Sunet | Wage calculation

Task #4860 | 5064.003

A wage change on the Employee card or via TimeMachine is transmitted with the interfaces during claims reporting and data transmission.

1.8.4 General Reports | SwissSalary from Excel

Task #3604 | 5064.001

When importing data to optional fields, there was incorrect behavior in the area of wage fields. This has been fixed.

1.8.5 Hospital statistics | Version number

Task #5194 | 5064.003

In the first line "SX: Delivery notification" the interface version (column 2) has been corrected to 5.

1.9 Administration

1.9.1 Payroll Setup | QST Working days CH effective ST

Task #3980 | 5065.000

The field 'QST working days CH effective ST' is no longer used and is no longer available in Payroll Setup.

1.9.2 Salary type with net salary adjustment | Iteration Income Tax

Task #3680 | 5064.001

The previous gross for net calculation was replaced with 5064.000. With the iteration of the existing net salary adjustment, the income tax was also included in the iteration. This can now be selected for the salary types. For the salary type that is to be processed with net salary adjustment, select whether it is to be included in the calculation with or without iteration of the income tax.

1.9.3 Copy salary type | Client group posting matrix

Task #5394 | 5064.003

If there are several clients in a client group, the salary types are synchronized. The posting matrices stored on the posting types are not included in this synchronization, as they may differ.

If a salary type with a posting matrix is copied to client 1, the same salary type is also generated in client 2. The client-specific posting matrices are then stored on the copied salary types. For the copied wage type in client 1, this means that the posting matrix from client 1 is stored, but for the salary type in client 2, the posting matrix from client 2 is taken into account.

1.9.4 Salary types translations | Authorizations

Task #3802 | 5064.001

If a user is assigned the authorization set 'SWS SETUP' or 'SWS SETUP LIGHT' and this user wanted to create, change or delete translations of salary types, a message regarding missing authorization for table '3009119 SwS Translation' appeared. We have added the necessary authorizations to both authorization records.

1.9.5 Delete salary type | Remove benefit obligation

Task #3672 | 5064.001

When salary types are deleted, the entry in the salary type obligation is also deleted
New salary types can be entered with a number that already existed but was deleted
New salary types can be created using the copy function with a number that already existed but was deleted.

1.9.6 Benefit | Employee and employer salary types

Task #4878 | 5065.000

Employer and employee salary type: all salary types can now be selected here except salary types with the type fictitious; the calculation type is not relevant. Salary types with social security and/or income tax obligations will be calculated correctly as soon as all social security domains have been transferred to Benefit. Until then, we advise against storing such salary types.

1.9.7 Benefit | Insurance and Benefit Coverages

Task #3622 | 5064.001

The codes in the list of Benefit coverage are not translated correctly in the upgrade code for French users. This has been corrected.

1.9.8 Benefit Setup | Contract retroactive

Task #5023 | 5065.000

In the Benefit setup under 'Benefit contract line', a contract can be created or changed retroactively. Previously, this was not possible as soon as Salary Entry existed in a period.

1.9.9 Swissdec | Version 5.3

Task #5182 | 5065.000

SwissSalary has Swissdec 5.3 certification, which includes the reporting of teleworking for French cross-border commuters.

To ensure that the transmission is carried out with Swissdec 5.3, activate this in the payroll master data under domain 'Swissdec'.

1.9.10 Organization | Updating Income tax

Task #5193 | 5065.000

When importing Income tax rates via Administration / Organization and updating the store updates, the rates up to the previous year are no longer deleted but 4 previous years are left as they are. This should lead to fewer error messages due to missing rate tables for back payments across years.

1.9.11 Organization | Bank Directory Version 3.0

Task #4777 | 5065.000

The new version 3.0 of the Bank Directory Rest API from SIX Group is used, as the previous version 2.1 is only available until November 2025.

1.10 KLE

1.10.1 KLE | Salary TimeMachine

Task #4173 | 5064.002

When transmitting the annual salary story, KLE accesses any entries in TimeMachine and the salary on the Employee card.

1.10.2 KLE | Daily allowances Date

Task #4884 | 5064.002 [5061.302]

A change by Suva (possibly a new framework) has caused the "Date from" and "Date to" fields in the daily allowances to be sent with a new time zone. BC interpreted this incorrectly. This problem was solved by changing the data types.

1.10.3 KLE | Daily allowance report

Task #4030 | 5064.003

The daily allowance report can either be issued anonymously without personal details or with personal details. If the option anonymous without personal details is selected, the details of the injured or sick person are suppressed and the bank account to which the daily allowance is transferred is not listed.

1.10.4 KLE | Private information for employees

Task #5591 | 5065.000

With the 'declare', the private e-mail address, the private telephone number and the private mobile number are now also transmitted to the insurer, provided the data is maintained on the Employee card.

1.10.5 KLE|UKA|SUNET | Additional family allowances

Task #5284 | 5064.003

Previously, only the salary types of the statutory family allowances were supplied as family allowances for the daily allowance calculation. Now the salary types of the additional family allowances are also taken into account.

1.11 SwissSalary EasyRapport

1.11.1 Easy Rapport | Display vacation entitlement and balance

Task #5259 | 5064.003

In an open payroll run, an incorrect balance was displayed after an EasyRapport transfer was carried out. This error has been fixed. During an open payroll run, the current items in the EasyRapport transfer are no longer taken into account.

1.12 SwissSalary Direct

1.12.1 Direct document upload | e-mail notification

Task #3662 | 5064.002

Direct synchronization did not trigger any e-mail notifications when documents were sent from the personnel dossier or uploaded via zip archive.
The direct dispatch of payslips, the salary certificate and the Management Rapport card was never affected.

1.12.2 Direct dispatch | Payroll accounting

Task #3718 | 5065.000

The payslips can be prepared in the background and sent to the SwssSalary Direct portal. This function is useful if a large number of documents need to be prepared and sent, as it allows the execution to be scheduled at a point in time so that the other users in the system are not affected.

To do this, call up the payroll report, select "Send" and choose "Schedule" from the selection list. The "Schedule report" page then opens, where the desired execution time can be defined.

As soon as the task has been executed, this is displayed in the role center under the "Report Inbox" tile (fact box).

1.12.3 Direct dispatch | maximum document size

Task #3789 | 5065.000

The maximum upload size of documents to SwissSalary Direct is 7.25 MB. This is now already checked on the SwissSalary side, a message is displayed and the upload is prevented.

From now on, the entire process will no longer be canceled, but only the files that are too large will not be uploaded.

1.12.4 Direct dispatch | All persons registered

Task #4027 | 5065.000

The message for the SwissSalary Direct dispatch of report cards and Paychecks has been adapted in the same way as for the dispatch of salary certificate. If all persons are registered and no documents remain to be printed, the message 'All selected Paychecks have been sent to SwissSalary Direct and there is nothing more to display' or 'All selected reporting journals have been sent to SwissSalary Direct and there is nothing more to display' now appears.

1.12.5 Direct dispatch | Income tax confirmation

Task #5075 | 5065.000

The Income tax confirmation can now be uploaded to SwissSalary Direct.

1.12.6 Direct synchronization | Error message

Task #4799 | 5064.002

Synchronization has been adapted so that documents can be sent using the task queue.

1.12.7 SwissSalary Direct | Notifications for document uploads

Task #3662 | 5064.001

A Direct Synchronization has not triggered email notifications for documents uploaded from the Employee Dossier.

Email notifications are always sent when a report is run and the "Send to SwissSalary Direct" setting is activated.

- Payroll accounting
- Reporting journal
- Import ZIP archive into dossier

1.13 Technical partner and customer information

1.13.1 Tenant Registration | English

Task #2764 | 5064.003

The data of a new environment can now be initialized in English.

1.13.2 Salary type list | User restrictions

Task #4998 | 5064.003

Task #5896 | 5065.000

When calling up the salary type list, an error message appeared for users with client restrictions. This error has been resolved. Furthermore, adjustments to salary types are only possible if a user has the corresponding authorizations in all clients of the client group.

1.13.3 SaaS Setup Steps | ISO and KLE number series

Task #4783 | 5065.000

When a new SaaS tenant is set up, further data is added in addition to the tenant registration and the Sys-Init import. Number series for ISO and KLE are now also created.

1.13.4 License Errors | Insights Objects

Task #4794 | 5064.002

For OnPrem customers with version BC23, BC24 or BC25, it could happen that a license error message appeared when creating new clients or during installation. This occurred if the license did not contain any Insights objects.

The event that caused this behavior has now been adjusted so that this event is no longer executed if the license is missing. Insights as a module is not available for OnPrem so this event is irrelevant for OnPrem customers.

1.13.5 Upgrade Tags | Migration

Task #4825 | 5064.002

The setting of upgrade tags has been optimized and it has been ensured that the upgrade tags are set correctly.

1.13.6 REST creation of personnel card | error message

Task #4881 | 5064.002

When creating an employee with a POST request to the /employees REST endpoint, an error message occurred if the payroll group (AllocationGroup) was specified in the request body. This issue has been fixed.

1.13.7 Benefit Contract | PTE

Task #5392 | 5064.003

Benefit entities are now also available for the PTEs.

1.13.8 New event | Salary certificate item 12

Task #5507 | 5064.003

We have added a new trigger point for the wage statement.

With this event, we are able to change position 12 (Income tax deduction) in the Salary certificate for PTEs and partners with little effort if customer requests arise in this area.

2 Update 5065.000 | 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@swisssalary.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.swisssalary.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. |

| | | | | | |
|-------------------|----------------------|-------------------------------|---------|-----------------|--|
| SWS-ALL | SWS LOGIN | Login Permissions | Sys tem | 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. |
| SWS-POST | SWS POSTING | Payroll Posting | Sys tem | 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. |
| SWS-ST EDIT | SWS SALARY TYPE EDIT | Edit Salary Types | Sys tem | SwissSalary 365 | Full access for editing salary types. With this set of rights, salary types can be created, modified and deleted. |
| SWS-SETUP | SWS SETUP | Admin. SwS Module | Sys tem | SwissSalary 365 | Classic set of rights for wage administrators. |
| SWS-SETUP-LIGHT | SWS SETUP LIGHT | Admin. SwS Without User Setup | Sys tem | SwissSalary 365 | The same set of rights as SWS-SETUP with the restriction that SwissSalary users cannot be changed. |
| new from 5064.000 | SWS MSS | Manager Self Service | Sys tem | SwissSalary 365 | This permission set contains read rights to information for department heads. Customers have different situations/requirements regarding permissions. We have applied the best practices for permission set. Permissions with additional or your own permission sets can be adjusted at any time. For more information about permission sets, see: Granulare Berechtigungen definieren - Business Central Microsoft Learn Note: We have not linked the SWS PAYRAISE PROCESS and SWS PAYRAISE READ permission sets with the SWS MSS permission set. This is because we assume that there are different situations for department heads or deputies. Department heads who do not to see the pay raise process at all, are only allowed |

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| | | | | | to read or edit it. This means that if SWS MSS is assigned to a user, the SWS PAYRAISE PROCESS or SWS PAYRAISE READ permission set may have to be added manually. |
| <i>new from 5064.000</i> | SWS PAYRAISE PROCESS | Pay Raise - Edit and Process | Sys tem | SwissSalary 365 | Enables pay raise process editing. Note: If a user is assigned the SWS PROCESS permission set, the SWS PAYRAISE PROCESS permission set is also assigned automatically. This is because we have linked the SWS PROCESS permission set to the SWS PAYRAISE PROCESS permission set. |
| <i>new from 5064.000</i> | SWS PAYRAISE READ | Read Pay Raise Data | Sys tem | SwissSalary 365 | Enables pay raise process reading. Note: If a user is assigned the SWS READ permission set, the SWS PAYRAISE READ permission set is not assigned automatically. This is because we assume that not every user with SWS READ can also see the pay raise. |

2.4 Role | Profiles

The profile can be adjusted to your requirements at any time. For more information about permission sets, see: [Verwalten von Benutzern und Rollen - Business Central | Microsoft Learn](#)

The profiles below are available:

SwissSalary

The SwissSalary profile is assigned to persons processing payroll.

SwissSalary Manager Self Service

In this profile, we have reduced the number of Role center and menu items on the various pages to the necessary level. Customers have different requirements regarding the Role center and the pages. We have applied the best practices for profile.