Payroll Usability

Module	Description		How To	
Payroll	**Payroll Setup**			
	1. Create Tax Type		Go to Payroll menu > **Tax Types**	
			Enter the **Tax ID**, select the **Calculation Type** from the list. Select the **Paid By** that will indicate if this is an Employee or Company Tax. Fill in the other fields and click the Save button	
	2. Create Earning Type		Go to Payroll menu > **Earning Types**	
			Enter the **Earning ID** and select the **Calculation Type** from the list. Click the **Quick Add grid button** to add the created Tax type so that when you select the Earning ID in the Employee screen, Taxes will automatically populated.	
	3. Create Deduction Type		Go to Payroll menu > **Deduction Types**	

Enter the **Deduction ID** and select the **Calculation Type** from the list.

Click the **Quick Add grid button** to add the Employee and Company Taxes so that when this Deduction ID is selected in the Employee screen,Taxes will automatically populated.

4. Create Employee Pay Group	From Payroll menu > **Employee Pay Groups**
	Enter the Pay Group, Description and select the Cash Account in the Bank Account field that will be the default when you create an Employee Paycheck
5. Create Employee	Go to Payroll menu > **Employees**

Enter an **Employee No** and the Employee details.

Select the Pay Period.

Under Taxes tab	Click the **Add grid button** to add all the Employee and Company Taxes to be used when you create Paycheck
	After adding the Taxes, select the Federal Tax (Ex.FIT) then change the Federal Filing Status. The system will check the Filing status to auto compute the Employee and Company Taxes in Paycheck.

		Under Earnings tab	Click the **Add grid button** to select the Employee Earning ID's. Select Pay Group on each of the Employee Earnings. 	
			Select the added Earning Id and enter the **Amount** and **Default Hours** that will automatically use when you create Paycheck	
		Under Deductions tab	Click the **Add grid button** to add the Deduction ID	
	Create single Employee Paycheck			
	Create Employee Paycheck		Go to Payroll > **Paychecks**, click the **New** toolbar button and select the Employee	
			Employee Paycheck screen will open with the auto-computed Taxes 	
			You can manually change the Rate of the EarningID then click the Recalc toolbar button to recalculate the Taxes	
			Hit the Post button.	
	Use of Timecard for Employee Time Entries			
	Punch In and Out		From Payroll module, click the Timecard	

			Select the Employee No., enter the Password, select the Department and Job Code.	
			Click the **Save** button to punch IN (Time In) and to punch OUT (Time Out)	
			Employee Time Entries are displaying in Employee screen > Timesheet tab. 	
	Time Approval, Approving Employee Time Entries by the Supervisor			
			Employee Supervisor (per Department) must approved the Employee Time Entries.	
			From **Payroll** module, click the **Time Approval**	
			The Supervisor must select the Department, filter the Date Range and allows to modify the Employee Time Entries then click the checkbox to Approve.	
			Hit the Save toolbar button.	
	Time Approval - Create Employee Paychecks by the Payroll Admin			
			From the Payroll module, click the **Time Approval**	
			Payroll Admin should only allowed to create / process Employee Paychecks based on the Approved Time Entries.	

			Click the **Process** toolbar button.
	Process Pay Groups - Create multiple Employee Paychecks per selected Pay Group		
			From **Payroll** module, click the **Process Pay Groups**.
			Select the **Pay Groups** that you would want to process for creating of paychecks.
			Click the **Process** toolbar button to create Paychecks
	Batch Post - Multiple Unposted Paychecks		
			From **Payroll** module, click the **Batch Post**
			All unposted paychecks are displaying. Check the checkbox to select the Paychecks to batch post.

Click the **Post** toolbar button
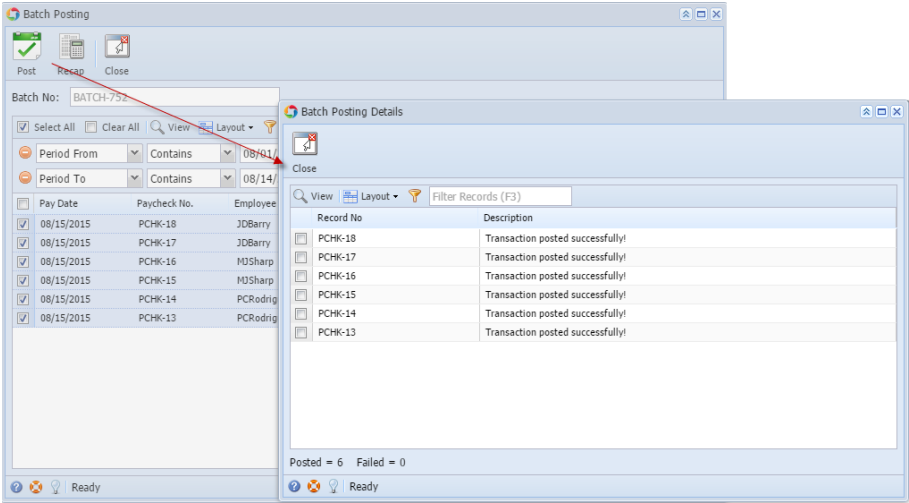
Selected paychecks were posted.
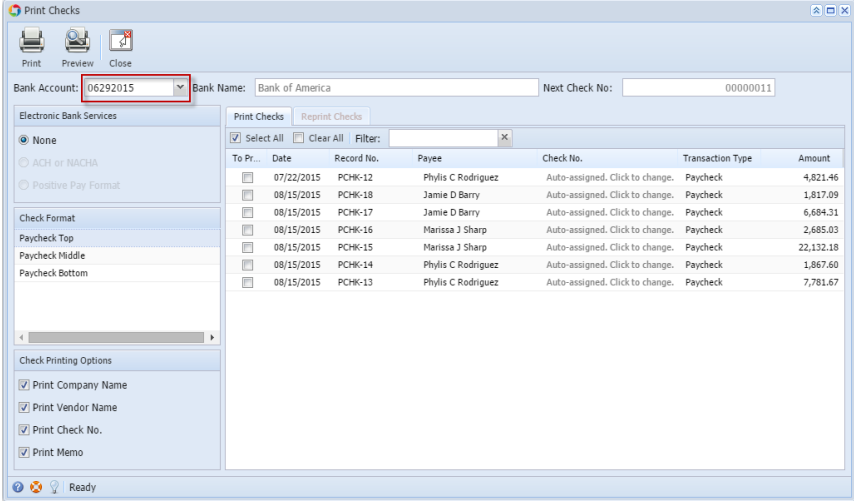
Print Checks - Multiple posted paychecks

From **Payroll** module, click the **Print Checks**

Select the Bank Account ID to display the list of posted Paychecks to be Printed

Select the Paychecks by checking the checkboxes.

Select the **Check Format report** and click the **Preview** toolbar button to preview the paycheck reports.

Print the paychecks and the Print Check Verification screen will be shown.

Print Check Verification						
Commit **Close**						
Printed Checks						
☑ Fail All ☐ Fail None						
Fail	Reason	Record No.	Date	Check No.	Payee	Amount
☐	Enter reason why the check failed to print.	PCHK-12	07/22/2015	00000011	Phylis C Rodriguez	4,821.46
☐	Enter reason why the check failed to print.	PCHK-18	08/15/2015	00000012	Jamie D Barry	1,817.09
☐	Enter reason why the check failed to print.	PCHK-17	08/15/2015	00000013	Jamie D Barry	6,684.31
☐	Enter reason why the check failed to print.	PCHK-16	08/15/2015	00000014	Marissa J Sharp	2,685.03
☐	Enter reason why the check failed to print.	PCHK-15	08/15/2015	00000015	Marissa J Sharp	22,132.18
☐	Enter reason why the check failed to print.	PCHK-14	08/15/2015	00000016	Phylis C Rodriguez	1,867.60
☐	Enter reason why the check failed to print.	PCHK-13	08/15/2015	00000017	Phylis C Rodriguez	7,781.67

? ⊗ 💡 | Ready

Click the **Commit** toolbar button.

Paychecks should be tagged as Printed and Posted with an assigned Check Nos.