

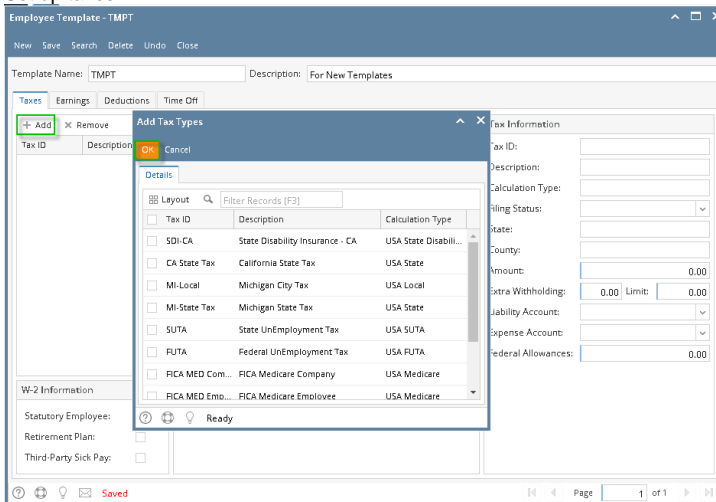
How to Create Employee Templates

1. Click **Employee Templates** from **Payroll** module.
2. If there are no templates yet, new **Employee Template** screen will be displayed directly. Otherwise, a list of existing employee templates will be displayed.
3. Click **New** toolbar button.



Template	
New Open Refresh Export Close	
Layout Filter Records (F3) 4 record(s)	
Template Name	Description
<input type="checkbox"/> Hourly - Single - Bi Weekly	Regular Template Bi Weekly
<input type="checkbox"/> Salary - Single - MI - Bi / Mo	Salary Single - MI Bi Weekly Sal / Mo Bonus
<input type="checkbox"/> Hourly - Married - MI - Bi Weekly	Hourly Married - MI - Bi Weekly
<input type="checkbox"/> Hourly - Married - Bi Weekly	Hourly Married Bi Weekly

4. Set up value of the following fields:
 - a. Template Name
 - b. Description
5. Set up taxes.



Employee Template - TMPT

Template Name: TMPT Description: For New Templates

Taxes Earnings Deductions Time Off

+ Add X Remove Add Tax Types

Tax ID Description

Details

Tax ID	Description	Calculation Type
<input type="checkbox"/> SDI-CA	State Disability Insurance - CA	USA State Disability...
<input type="checkbox"/> CA State Tax	California State Tax	USA State
<input type="checkbox"/> MI-Local	Michigan City Tax	USA Local
<input type="checkbox"/> MI-State Tax	Michigan State Tax	USA State
<input type="checkbox"/> SUTA	State Unemployment Tax	USA SUTA
<input type="checkbox"/> FUTA	Federal Unemployment Tax	USA FUTA
<input type="checkbox"/> FICA MED Com...	FICA Medicare Company	USA Medicare
<input type="checkbox"/> FICA MED Empl...	FICA Medicare Employee	USA Medicare

W-2 Information

Statutory Employee: ☐ Ready

Retirement Plan: ☐

Third-Party Sick Pay: ☐

Tax Information

Tax ID:

Description:

Calculation Type:

Filing Status:

State:

County:

Amount: 0.00

Extra Withholding: 0.00 Limit: 0.00

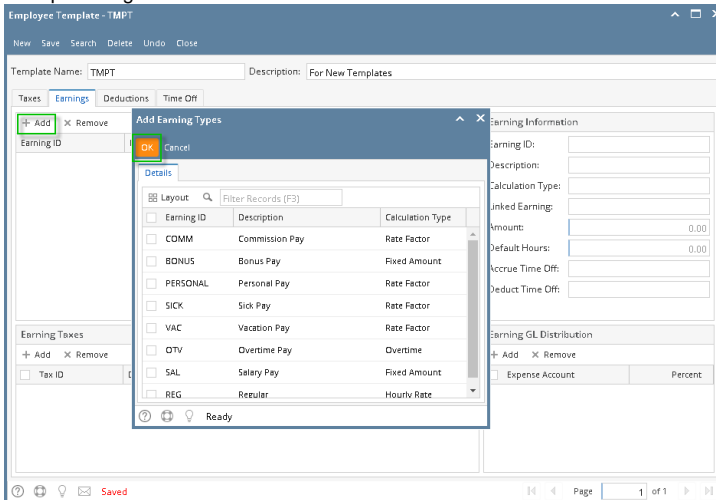
Liability Account:

Expense Account:

Federal Allowances: 0.00

Page 1 of 1

6. Set up earnings.



Employee Template - TMPT

Template Name: TMPT Description: For New Templates

Taxes Earnings Deductions Time Off

+ Add X Remove Add Earning Types

Earning ID Description

Details

Earning ID	Description	Calculation Type
<input type="checkbox"/> COMM	Commission Pay	Rate Factor
<input type="checkbox"/> BONUS	Bonus Pay	Fixed Amount
<input type="checkbox"/> PERSONAL	Personal Pay	Rate Factor
<input type="checkbox"/> SICK	Sick Pay	Rate Factor
<input type="checkbox"/> VAC	Vacation Pay	Rate Factor
<input type="checkbox"/> QTV	Overtime Pay	Overtime
<input type="checkbox"/> SAL	Salary Pay	Fixed Amount
<input type="checkbox"/> REG	Regular	Hourly Rate

Earning Taxes

+ Add X Remove

Tax ID

Earning Information

Earning ID:

Description:

Calculation Type:

Linked Earning:

Amount: 0.00

Default Hours: 0.00

Accrue Time Off:

Deduct Time Off:

Earning GL Distribution

+ Add X Remove

Expense Account	Percent
<input type="text"/>	<input type="text"/>

Page 1 of 1

7. Set up deductions.

Employee Template - TMPT

Template Name: TMPT Description: For New Templates

Taxes Earnings Deductions Time Off

+ Add X Remove

Deduction ID

+ Add X Remove

Tax ID

Details

Layout Filter Records (F3)

Deduction ID	Description	Calculation Type
Unifoms	Unifoms	Percent
IRA	IRA Match	Percent
401K	401K Deduction	Percent

Ready

Deduction Information

Deduction ID:

Description:

Paid By:

Calculation Type:

Deduct From:

Amount: 0.00

Limit: 0.00

Liability Account:

Expense Account:

Begin Date:

End Date:

Page 1 of 1

8. Set up time offs.

Employee Template - TMPT

Template Name: TMPT Description: For New Templates

Taxes Earnings Deductions Time Off

+ Add X Remove

Time Off ID

+ Add X Remove

Details

Layout Filter Records (F3)

Time Off ID	Description
PER (Year)	Personal Time Off (Year)
SICK	3 Days Sick Time
Personal	3 Days Personal Time
VAC (Year)	Vacation Time Off (Year)
VAC (Hour)	Vacation Time Off (Hour)

Ready

Time Off Information

Time Off ID:

Description:

Eligible Date:

Rate (Hours): 0.00 Per: 0.00

Award On:

Max Earned: 0.00

Max Carryover: 0.00

Page 1 of 1

i Make sure to associate the time off to the earnings from **Earnings** tab after saving since it will not be displayed before it is saved.

9. Click **Save** toolbar button to create employee template.

Employee Template - TMPT

Template Name: TMPT Description: For New Templates

Taxes Earnings Deductions Time Off

+ Add X Remove

Time Off ID Description

PER (Year) Personal Time Off (Year)

Time Off Information

Time Off ID: PER (Year)

Description: Personal Time Off (Year)

Eligible Date:

Rate (Hours): 40.00 Per: 1.00 Week

Award On: Anniversary Date

Max Earned: 100.00

Max Carryover: 100.00

Page 1 of 1

10. Newly created template should appear in the grid.

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Employee Template - TMPT

New Save Search Delete Undo Close

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Taxes Earnings Deductions Time Off

+ Add X Remove Add Tax Types

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W-2 Information

Statutory Employee: ☐ Ready

Retirement Plan: ☐

Third-Party Sick Pay: ☐

Tax Information

Tax ID:

Description:

Calculation Type:

Link Status:

State:

County:

Amount: 0.00

Extra Withholding: 0.00 Limit: 0.00

Liability Account:

Expense Account:

Federal Allowances: 0.00

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Earning Taxes

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Tax ID:

Earning Information

Earning ID:

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Calculation Type:

Linked Earnings:

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Default Hours: 0.00

Accrue Time Off:

Deduct Time Off:

Earning GL Distribution

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Expense Account	Percent
<input type="text"/>	<input type="text"/>

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Deduction ID

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Tax ID

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401K	401K Deduction	Percent

Ready

Deduction Information

Deduction ID:

Description:

Paid By:

Calculation Type:

Deduct From:

Amount: 0.00

Limit: 0.00

Liability Account:

Expense Account:

Begin Date:

End Date:

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VAC (Hour)	Vacation Time Off (Hour)

Ready

Time Off Information

Time Off ID:

Description:

Eligible Date:

Rate (Hours): 0.00 Per: 0.00

Award On:

Max Earned: 0.00

Max Carryover: 0.00

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