Payroll in 5 Easy Steps

Step 1: Employee Changes

Make employee changes by clicking on **Employee Maintenance** from the **Employee** screen:

- Pay Rate Changes
- Address Changes
- Direct Deposit Changes
- Recurring Deduction Changes
- Terminations
- Time-Off Accrual Adjustments
- ……Etc.

Add new employees by clicking on **Add New Employees** from the **Employee** screen

Step 2: Start Payroll

Verify the Checkdate by looking at the date that appears at the top of the **Payroll** screen. A Green arrow should be visible in the black box to the left of **Start Payroll** (If the checkdate at the top of the Payroll screen is not your next scheduled checkdate, you may have forgotten to **Backup/Synchronize** after your last payroll (*see step 5*)

Click on **Start Payroll** to start your payroll.

Verify that your Payroll Period Begin and Period End dates are correct, and that your Batch Period Begin and Period End Dates are correct. You'll also want to make sure that both **Apply Base Auto Pay** and **Apply Employee Auto Pays** are checked and that the **Default Pay Type** is set to **Reg-Regular** (unless doing a Bonus or Custom Payroll Run)

Click on **Start Payroll Now** - You will see that a Blue Checkmark now appears in the box to the left of **Start Payroll**, and a Green Arrow appears in the box to the left of **Payroll Entry**

Step 3: Payroll Entry

Click on **Payroll Entry** (Should be in Open status) and then click on your Payroll **Batch** to begin entering payroll
Select the order in which you would like to enter payroll by clicking on 1 of the 3 available sorting options:

1001	**Employee ID**	(Employees will appear in order of Employee ID, smallest to largest)
	Alphabetical	(Employees will appear in order of Lastname, Firstname, Middlename, A to Z)
USER	**Custom Sort**	(Employees will appear in the order that you select in the **Filter** Drop-Down List)

Enter hours/amounts for the first employee and then click on the arrow at the top of the screen to advance to the next employee. Using the Plus Key (**+**) on your keyboard will also advance to the next employee.

Step 3 Cont'd on Reverse

Continue entering hours/amounts for each of your employees until you get to the end of your list of employees.

Both **Summary** and **Detailed** check information can be viewed at the bottom of the payroll entry screen. The Summary information is visible in the Blue Bar that is located below the Pay Entry grid and above the detailed check information at the bottom of the screen.

Click on the **Override…** button on the **Payroll Entry** screen to enter any overrides, such as:

- Blocking specific Earnings or Deductions
- Overriding or blocking Taxes
- Blocking Direct Deposits
- Blocking Labor Allocation

Once you've completed Payroll Entry, you must review your **Pre-Process Register** to ensure that everything has been entered and is calculating correctly. The Pre-Process Register will show you exactly what will happen when the payroll is processed, so please make sure to review the following:

- Total Earnings, Total Deductions, Total Taxes, Total Net Pay
- Pay Rates
- Recurring Deductions
- 401K Employer Match (if applicable)
- Direct Deposits

The Pre-Process Register report can be run in one of two different ways:

1. Click on Payroll – Then Click on Payroll Entry – Then click on **Batch Totals** to the right of your Payroll **Batch** Then click on **Run Preprocess Register – This Batch**
2. Click on **Reports** – Then Select the **Preprocess Register Report,** Right-Click on the Report and **Preview** (Use this method if you want to sort/group the report <u>not</u> in **"Department/Alphabetical"** order)

**** REVIEW THE PRE-PROCESS REGISTER REPORT <u>VERY</u> CAREFULLY ****

Step 4: Submit Payroll

Click on **Submit Payroll** from the **Payroll** screen
Click on **Close All Batches** from the **Submit Payroll** screen
Click on **Submit Payroll Now** from the Submit Payroll screen
You will now see that there are Blue Checkmarks next to all of the following:

- Start Payroll
- Payroll Entry (Should be in Closed status)
- Submit Payroll

Your Payroll has now been submitted and will be processed by Payroll Direct, and checks/reports will be generated and shipped to your location.

Step 5: Back-Up/Synchronize

Once you receive your checks/reports via Courier or UPS, Click on **Back-Up/Synchronize** on the **Payroll Screen**. This will Synchronize your data with Payroll Direct's data. You will see that the timestamp has been updated with the latest received date/time and you will now see up to date payroll history. You will also see that your next Check Date now appears at the top of the Payroll Screen and a Green Checkmark appears in the box to the left of **Start Payroll.**