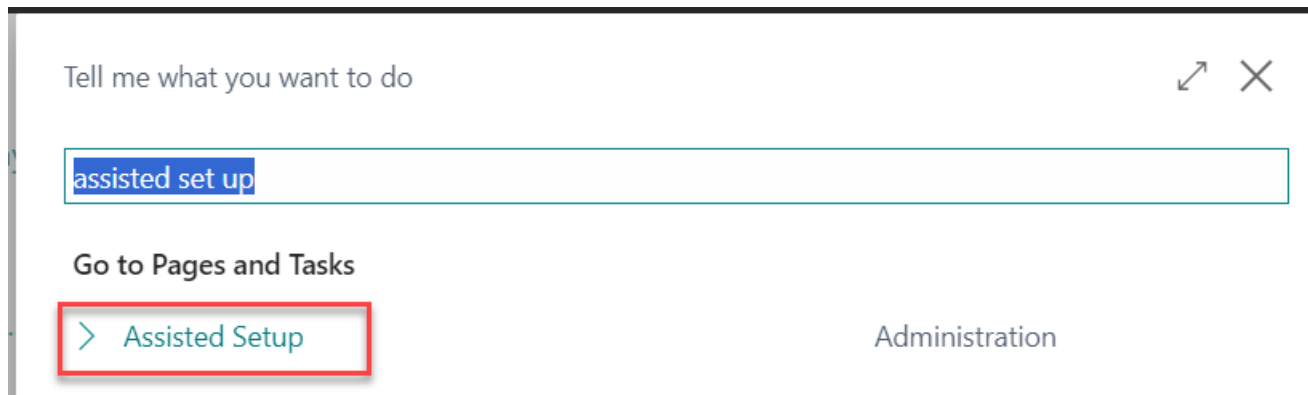


Assisted Setup Wizard

Modified on: Wed, 22 Dec, 2021 at 8:45 AM

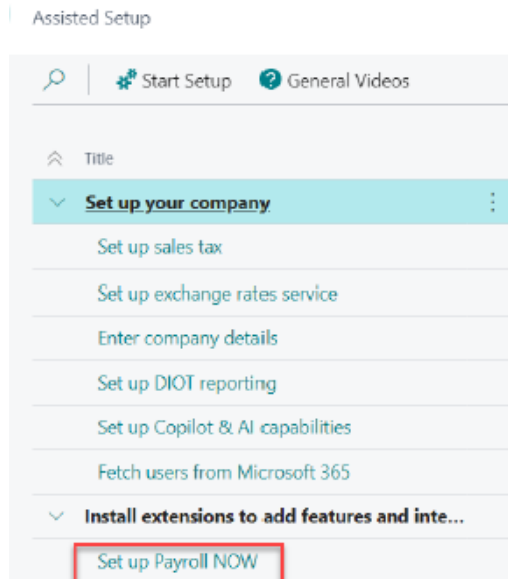
Synopsis: Payroll Now provides an 'Assisted Setup' that walks new users through the Payroll Now Setup Process. This simplifies and accelerates the setup process for the end user.

Step 1. Select 'Search Icon' and enter 'Assisted'. Select 'Assisted Setup'

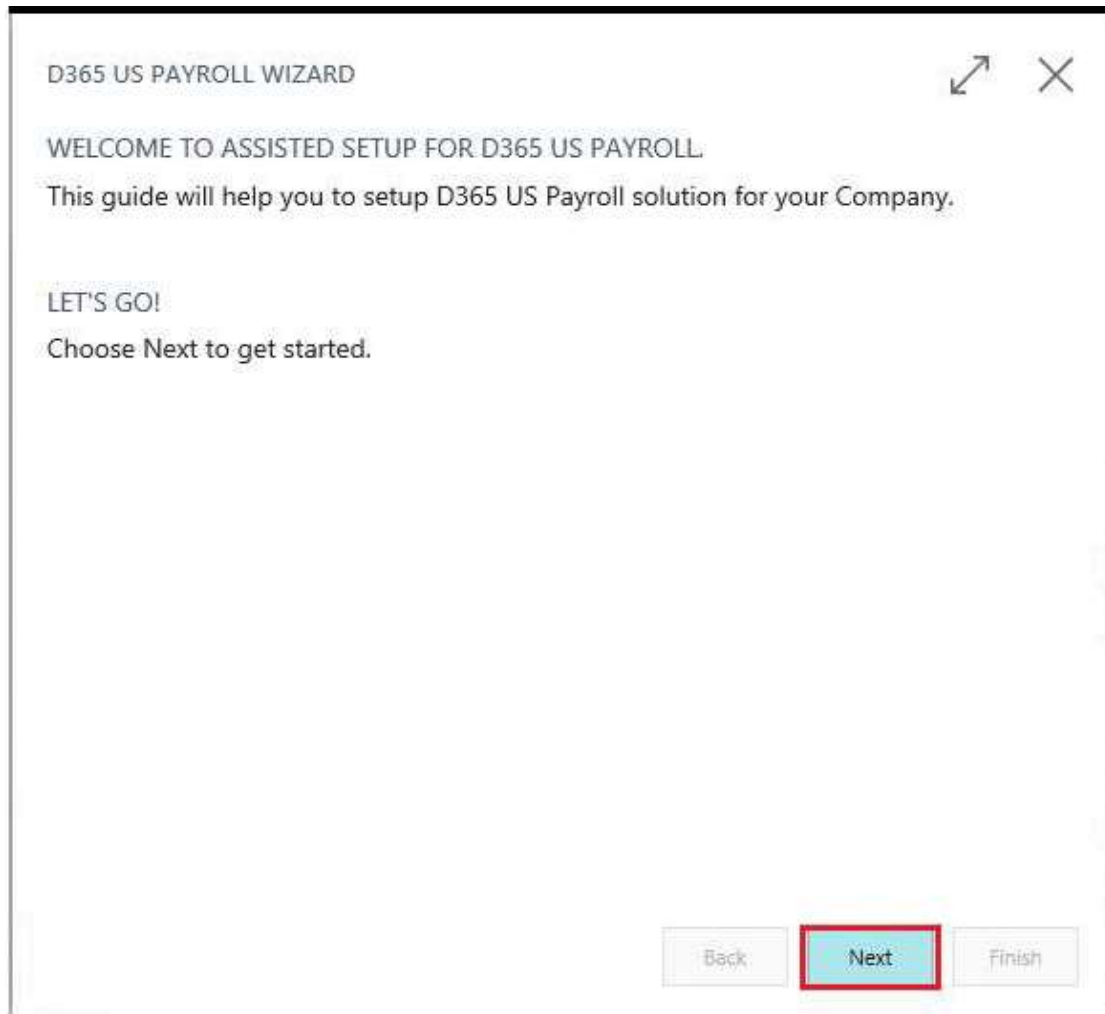


The screenshot shows a search interface with a header bar containing the text "Tell me what you want to do" and two icons (a magnifying glass and a close button). Below the header is a search input field containing the text "assisted set up". Underneath the search field, the text "Go to Pages and Tasks" is displayed. A list of results is shown, with the first item being "> Assisted Setup", which is highlighted with a red rectangular box. To the right of this list item, the word "Administration" is visible.

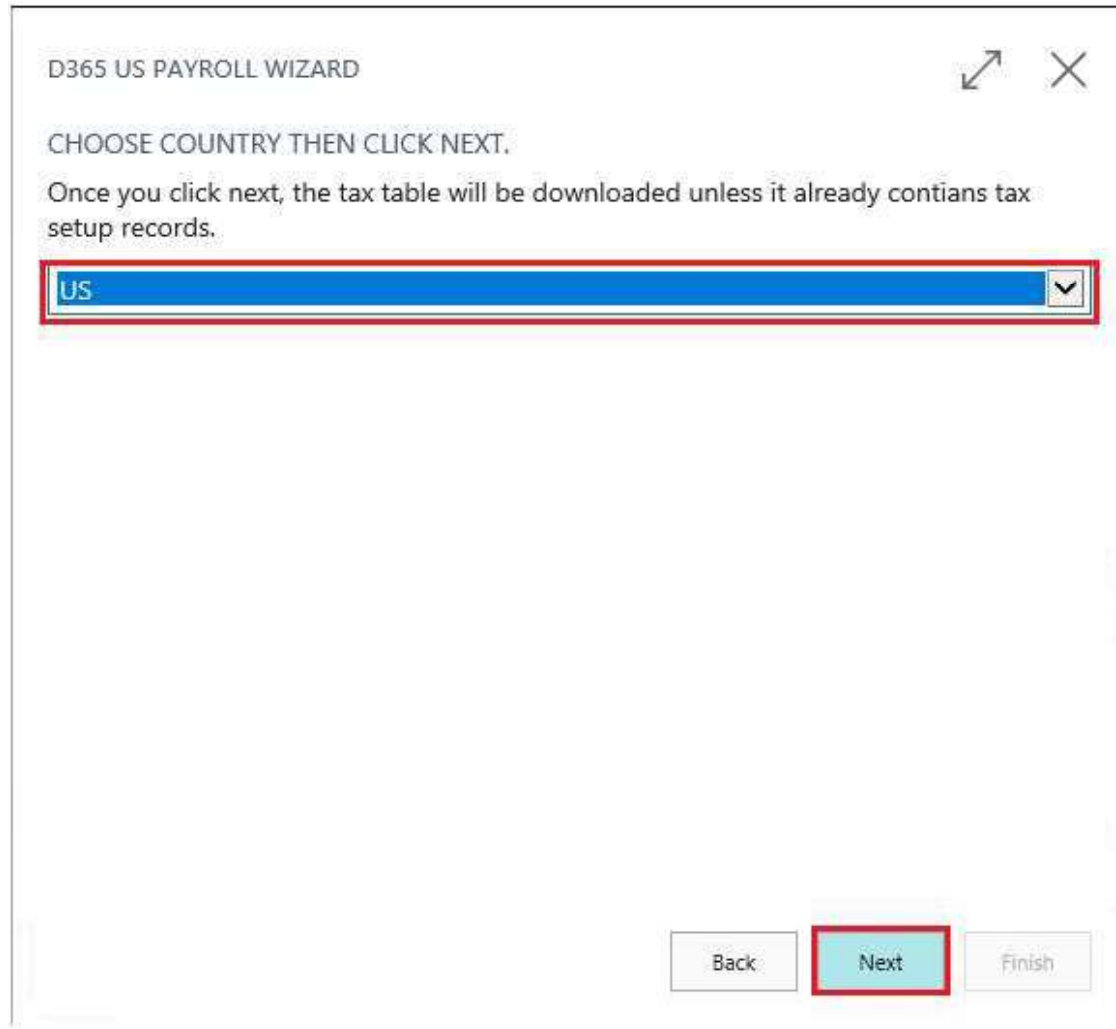
Step 2. Select 'Set up Payroll Now'



Step 3. The Payroll Now Wizard pops up. Click 'Next'



Step 4. "Choose Country" select 'US' from drop down. Then click 'Next'



D365 US PAYROLL WIZARD

CHOOSE COUNTRY THEN CLICK NEXT.

Once you click next, the tax table will be downloaded unless it already contains tax setup records.

US

Back Next Finish

Step 5. “Do you want to create a Payroll Permission Set and a Payroll Role Center?”

- Set ‘Yes we do’ to true
- Click ‘Next’

D365 US PAYROLL WIZARD

DO YOU WANT TO CREATE A PAYROLL PERMISSION SET AND A PAYROLL ROLE CENTER?

Please note, certain multi-tenant settings can cause an error if yes is selected.

Yes, we do ☒

No, we don't ☐

Back Next Finish

Step 6. "Specify New or Existing No. Series to Use"

- By default, all No. Series will pre-populate.
- Click 'Next

D365 US PAYROLL WIZARD

SPECIFY NEW OR EXISTING NO. SERIES TO USE:

Payroll Employee	PAYROLL-EM	...
Payroll Processing	PAYROLL-PR	...
Posted Payroll Processing	PAYROLL-PP	...
Batch Payroll Processing	PAYROLL-BA	...
Payroll Journal	PAYROLL-JN	...
Payroll PTO Journal	PAYROLL-PT	...
Payroll Applicants	PAYROLL-AP	...

Back Next Finish

Step 7. "Create Default Codes for the Following Payroll Types:"

- By default all options should be set to True.
- Click 'Next'

D365 US PAYROLL WIZARD

CREATE DEFAULT CODES FOR THE FOLLOWING PAYROLL TYPES:

Earnings ☒

Deductions ☒

Withholdings ☒

Employer Taxes ☒

Payment ☒

Employer Contributions ☒

Back Next Finish

Step 8. "Do you have local taxes?"

- Set 'Yes we do' to true
- Click 'Next'

D365 US PAYROLL WIZARD

DO YOU HAVE LOCAL TAXES?

Yes, we do ☒

No, we don't ☐

Back Next Finish

Step 9. "Do you have State Income Tax"

- Set 'Yes, we do – One State' to True
- Click 'Next'

D365 US PAYROLL WIZARD

DO YOU HAVE STATE INCOME TAX?

Yes, we do - One State ☒

Yes, we do - Multiple States ☐

No, we don't ☐

Back Next Finish

Step 10. "Please Indicate in which state you operate:"

- In 'Primary State Abbreviation' select 'CA' from drop down menu
- Enter 'Primary State Tax ID Number' of 123456789
- Click 'Next'

D365 US PAYROLL WIZARD

PLEASE INDICATE IN WHICH STATE YOU OPERATE:

Primary State Abbreviation CA

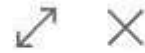
Primary State Tax ID Number 123456789

Back Next Finish

Step 11. "Please select pay cycle periods applicable for your company"

- Set 'Weekly' to True
- Set 'Semimonthly' to True
- Click 'Next'

D365 US PAYROLL WIZARD



PLEASE SELECT PAY CYCLE PERIOD(S) APPLICABLE FOR YOUR COMPANY:

Weekly	☒
Biweekly	☐
Semimonthly	☒
Monthly	☐
Quarterly	☐
Semiannually	☐
Annually	☐

Back

Next

Finish

Step 12. "Do you want to Config Posting Setup?"

- Set 'Yes, we do' to True
- Click 'Next'

D365 US PAYROLL WIZARD

DO YOU WANT TO CONFIG POSTING SETUP?

Yes, we do ☒

No, we don't ☐

Back Next Finish

Step 13. "Please click on each checkbox and config related posting setup:"

- Set 'Employee Posting Setup' to True
- Employee Posting Groups Setup window will immediately pop up.
- Select 'Bank Account No' Field and select a bank account from drop down menu
- Click 'Close'

Search + New Edit List Delete ...

EDIT - EMPLOYEE POSTING GROUPS + New

CODE	DESCRIPTION	BANK ACCOUNT NO.
ALL	All Employees	

NO.	NAME
GIRO	Giro Bank
NBL	New Bank of London
WWB-EUR	World Wide Bank
WWB-OPERA...	World Wide Bank
WWB-TRANS...	World Wide Bank
WWB-USD	World Wide Bank

+ New Select from full list

CODE	DESCRIPTION	BANK ACCOUNT NO.
ALL	All Employees	WWB-OPERA

Step 14. "Please click on each checkbox and config related posting setup:"

- Set 'Payroll Earnings' to True
- Payroll Earnings Posting Setup window will immediately pop up.
- Select 'G/L Account' in 'Account Type' field and enter/select a G/L Account # for 'Account No.'
- Repeat this for all Earnings Codes
- Click 'Close'

Search + New Edit List Delete ...

EDIT - PAYROLL EARNINGS POSTING SETUP

+ New

PAYROLL CODE	EMPLOYEE POSTING GROUP	ACCOUNT TYPE	ACCOUNT NO.
BONUS	ALL	G/L Account	62100
HOLIDAY	ALL	G/L Account	62100
OTHER	ALL	G/L Account	62100
OVERTIME	ALL	G/L Account	62100
PERSONAL DAY	ALL	G/L Account	62100
REGULAR	ALL	G/L Account	62100
SICK PAY	ALL	G/L Account	62100
VACATION PAY	ALL	G/L Account	62100

< >

Close

Step 15. "Please click on each checkbox and config related posting setup:"

- Set 'Payroll Withholding / Deduction' to True
- Payroll Withholding / Deduction Setup window will immediately pop up.
- Select 'Vendor' in 'Account Type' field and enter/select a vendor # for 'Account No.'
- Repeat this for all Withholding / Deduction Codes
- Click 'Close'

Search + New Edit List Delete ...

EDIT - PAYROLL WH / DEDUCTION SETUP + New

EMPLOYEE POSTING GROUP		PAYROLL TYPE	PAYROLL CODE	ACCOUNT TYPE	ACCOUNT NO.
ALL		Deductions	HSA	Vendor	01254796
ALL		Deductions	HSA_FAM	Vendor	01254796
ALL	⋮	Deductions	SIMP_401K	Vendor	01254796
ALL		Deductions	SIMP_IRA	Vendor	01254796
ALL	⋮	Withholdings	FEDERAL INCOM	Vendor	01254796
ALL		Withholdings	FICA - MED	Vendor	01254796
ALL		Withholdings	FICA - SS	Vendor	01254796
ALL		Withholdings	LOCAL BRACKE	Vendor	01254796
ALL		Withholdings	LOCAL TAX RES	Vendor	01254796
ALL		Withholdings	LOCAL TAX SD	Vendor	01254796
ALL		Withholdings	LOCAL TAX WK	Vendor	01254796
ALL	⋮	Withholdings	STATE	Vendor	01254796

< >

Close

Step 16. "Please click on each checkbox and config related posting setup:"

- Set 'Payroll Employer Tax' to True
- Payroll Employer Tax Posting Setup window will immediately pop up.
- For 'Debit Account Type' select 'G/L Account' and for 'Debit Account No.' select an account #
- For 'Credit Account Type' Select 'Vendor' and for 'Debit Account No.' select an account #

- Repeat this for all Payroll Employer Tax Codes
- Click 'Close'

Search + New Edit List Delete Process ...

EDIT - EMPLOYER TAX POSTING SETUP + New

EMPLOYEE POSTING GROUP	PAYROLL CODE	DEBIT ACCOUNT TYPE	DEBIT ACCOUNT NO.	CREDIT ACCOUNT TYPE	CREDIT ACCOUNT NO.
ALL	FICA MED EMPL	G/L Account	62100	Vendor	01254796
ALL	FICA SS EMPLO	G/L Account	62100	Vendor	01254796
ALL	FUTA	G/L Account	62100	Vendor	01254796
ALL	SUTA	G/L Account	62100	Vendor	01254796

< >

Close

Step 17. "Please click on each checkbox and config related posting setup:"

- Set 'Payroll Employer Contribution' to True
- Payroll Employer Contribution Posting Setup window will immediately pop up.
- For 'Debit Account Type' select 'G/L Account' and for 'Debit Account No.' select an account #
- For 'Credit Account Type' Select 'Vendor' and for 'Debit Account No.' select an account #
- Repeat this for all Payroll Employer Contribution Codes
- Click 'Close'

Search + New Edit List Delete Process ...

EDIT - PAYROLL EMPLOYER CONTRIBUTION SETUP + New

EMPLOYEE POSTING GROUP	PAYROLL CODE	DEBIT ACCOUNT TYPE	DEBIT ACCOUNT NO.	CREDIT ACCOUNT TYPE	CREDIT ACCOUNT NO.
ALL	E-HEALTH_CON	G/L Account	62100	Vendor	01254796
ALL	E-RETIREMENT_	G/L Account	62100	Vendor	01254796

< >

Close

Step 18. "Please click on each checkbox and config related posting setup:"

- Set 'Payroll Payment Setup' to True
- Payroll Payment Setup window will immediately pop up.
- For 'Account Type' field select 'Posting Group Bank Account'
- Repeat this for all Payroll Payment Setup Codes
- Click 'Close'

Search + New Edit List Delete ...

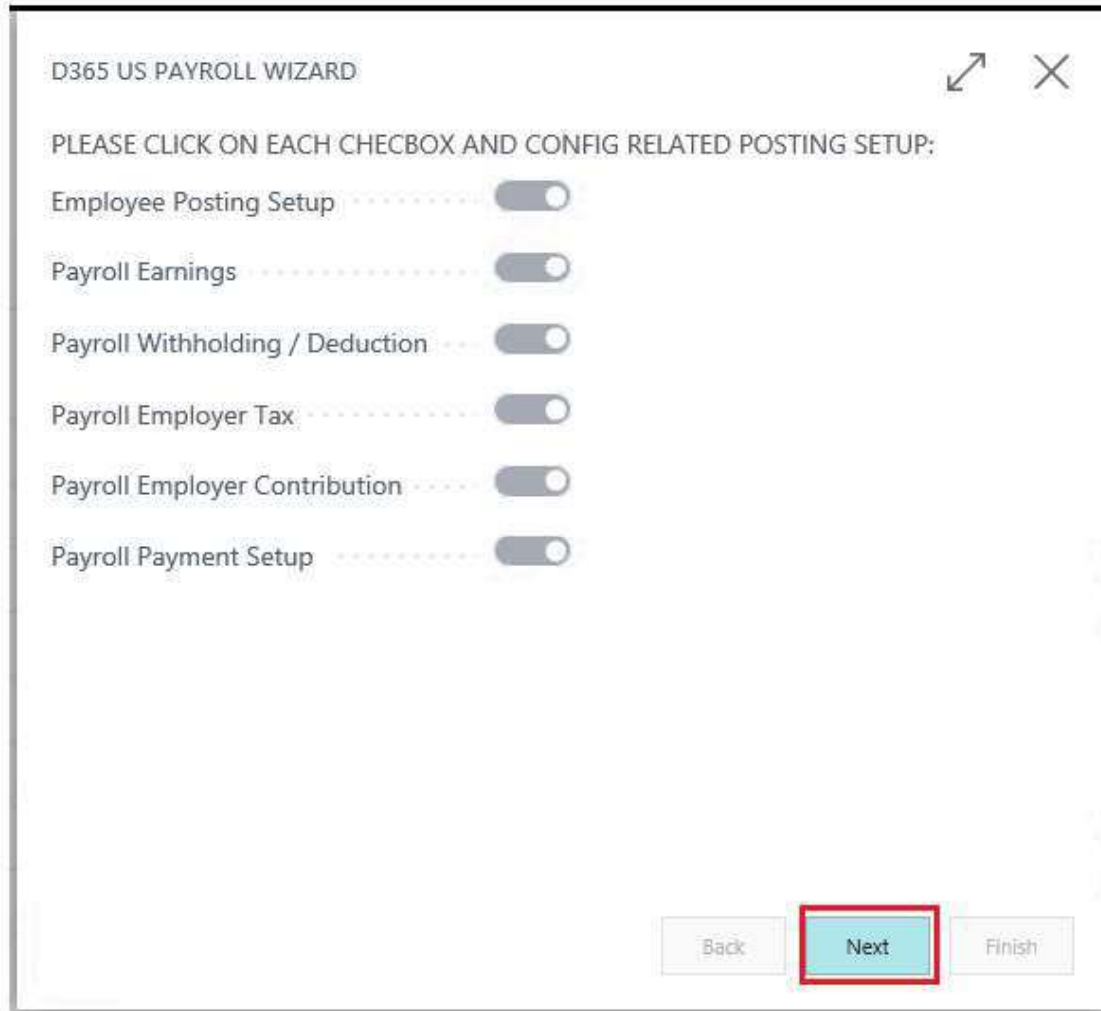
EDIT - PAYROLL PAYMENT SETUP + New ☰ ☷ ↗

EMPLOYEE POSTING GROUP	PAYROLL TYPE	PAYROLL CODE	ACCOUNT TYPE	ACCOUNT NO.
ALL	Direct Depos	DEFAULT DIREC	Posting G	
ALL	Payment	CHECK	Posting Grou	

< >

Close

Step 19. The Posting Setups are complete. Click 'Next'



D365 US PAYROLL WIZARD

PLEASE CLICK ON EACH CHECKBOX AND CONFIG RELATED POSTING SETUP:

- Employee Posting Setup ☒ ☒
- Payroll Earnings ☒ ☒
- Payroll Withholding / Deduction ☒ ☒
- Payroll Employer Tax ☒ ☒
- Payroll Employer Contribution ☒ ☒
- Payroll Payment Setup ☒ ☒

Back Next Finish

Step 20. "Please specify information for a tax form":

- Enter info that will appear on tax forms.
- Click 'Next'

D365 US PAYROLL WIZARD

PLEASE SPECIFY INFORMATION FOR A TAX FORM:

Name	John Doe
Title	Owner
Phone	555-555-5555
E-mail	jd@acmecoco.com

Back Next Finish

Step 21. “Do you want to import signature for a tax form and check?”:

- Set ‘No, we don’t’ to True
- Click ‘Next’

D365 US PAYROLL WIZARD

DO YOU WANT TO IMPORT SIGNATURE FOR A TAX FORM AND CHECK?

Yes, we do ☐

No, we don't ☒

Back Next Finish

Step 22. "Do you want to create test employee?":

- Set 'Yes, we do' to True
- Click 'Next'

D365 US PAYROLL WIZARD

DO YOU WANT TO CREATE TEST EMPLOYEE?

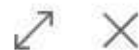
Yes, we do ☒

No, we don't ☐

Back Next Finish

Step 23. That's it! Click 'Finish' to complete the setup wizard.

D365 US PAYROLL WIZARD



THAT'S IT!

D365 US Payroll setup have been successfully created.

D365 US PAYROLL IS READY FOR USE!

Please click finish to complete setup.

Back

Next

Finish