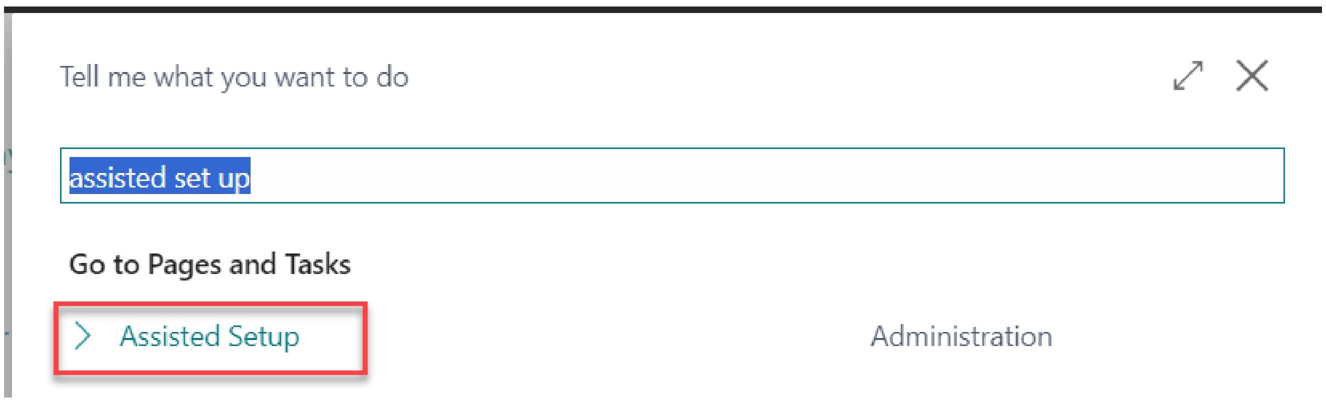
Assisted Setup Wizard

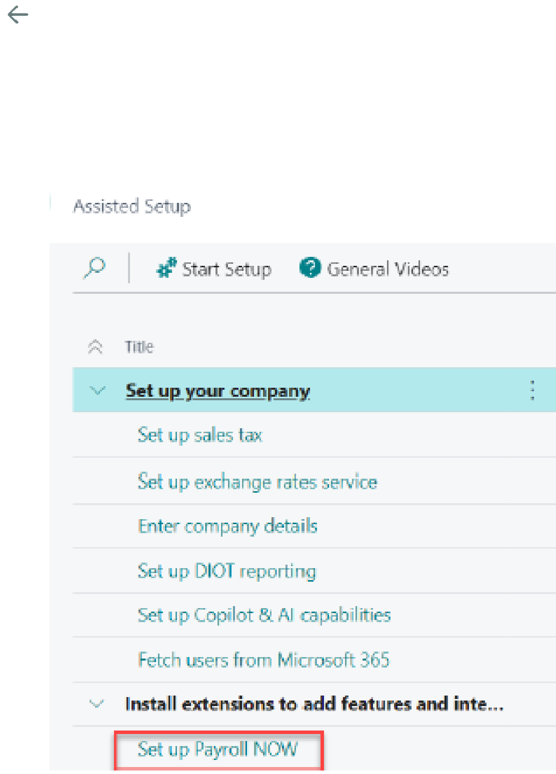
Modified on: Wed, 22 Dec, 2021 at 8:45 AM

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.

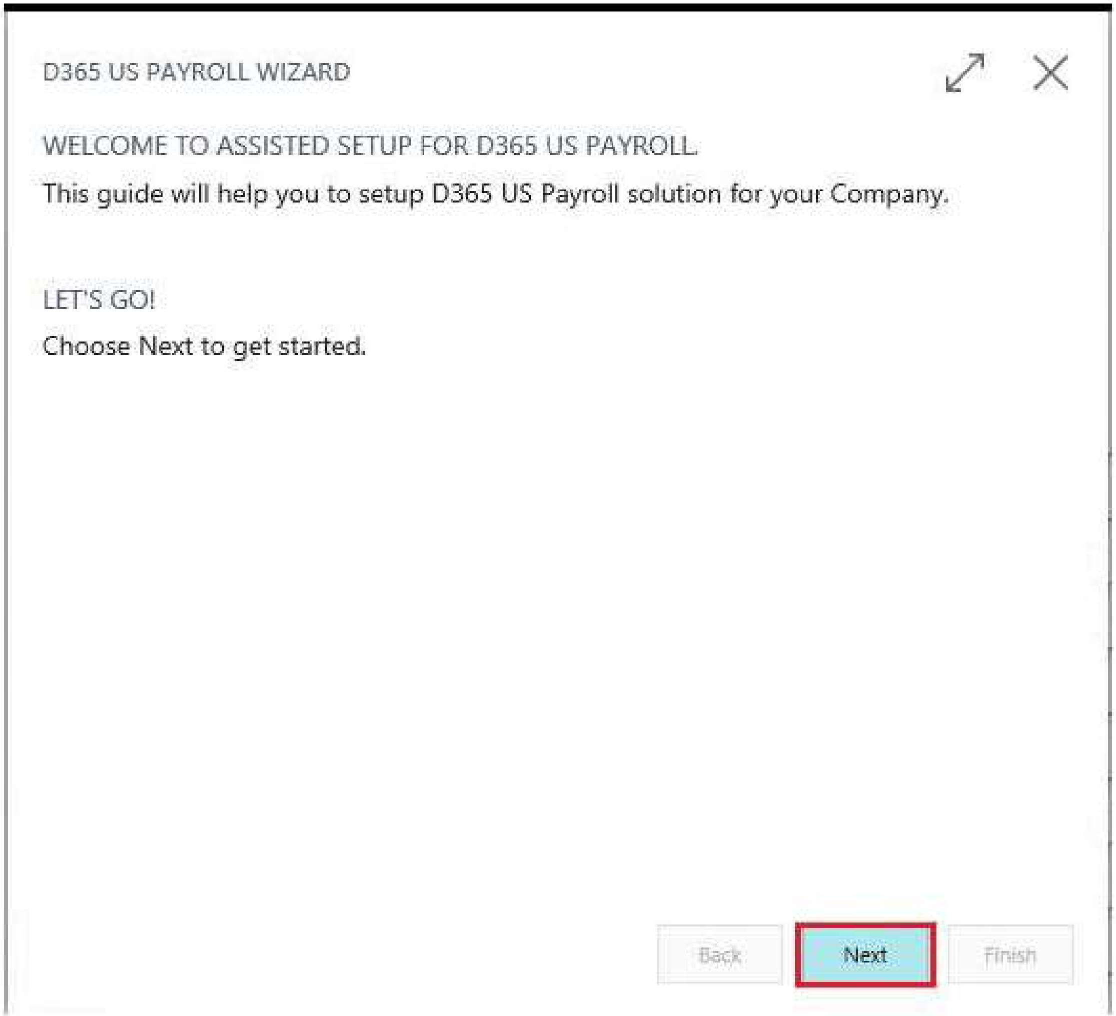
Step 1. Select 'Search Icon' and enter 'Assisted'. Select 'Assisted Setup'



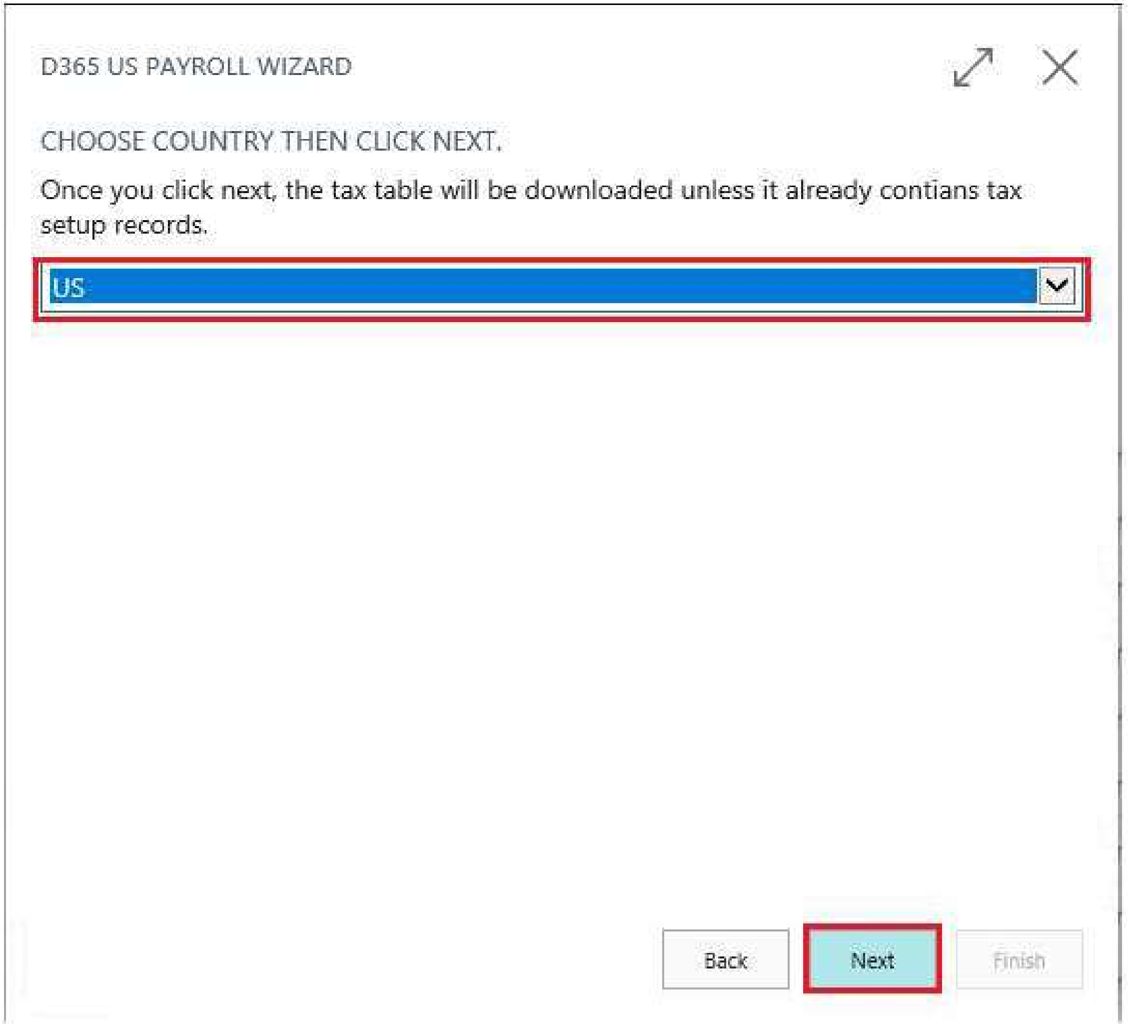
Step 2. Select 'Set up Payroll Now'



Step 3. The Payroll Now Wizard pops up. Click ‘Next’

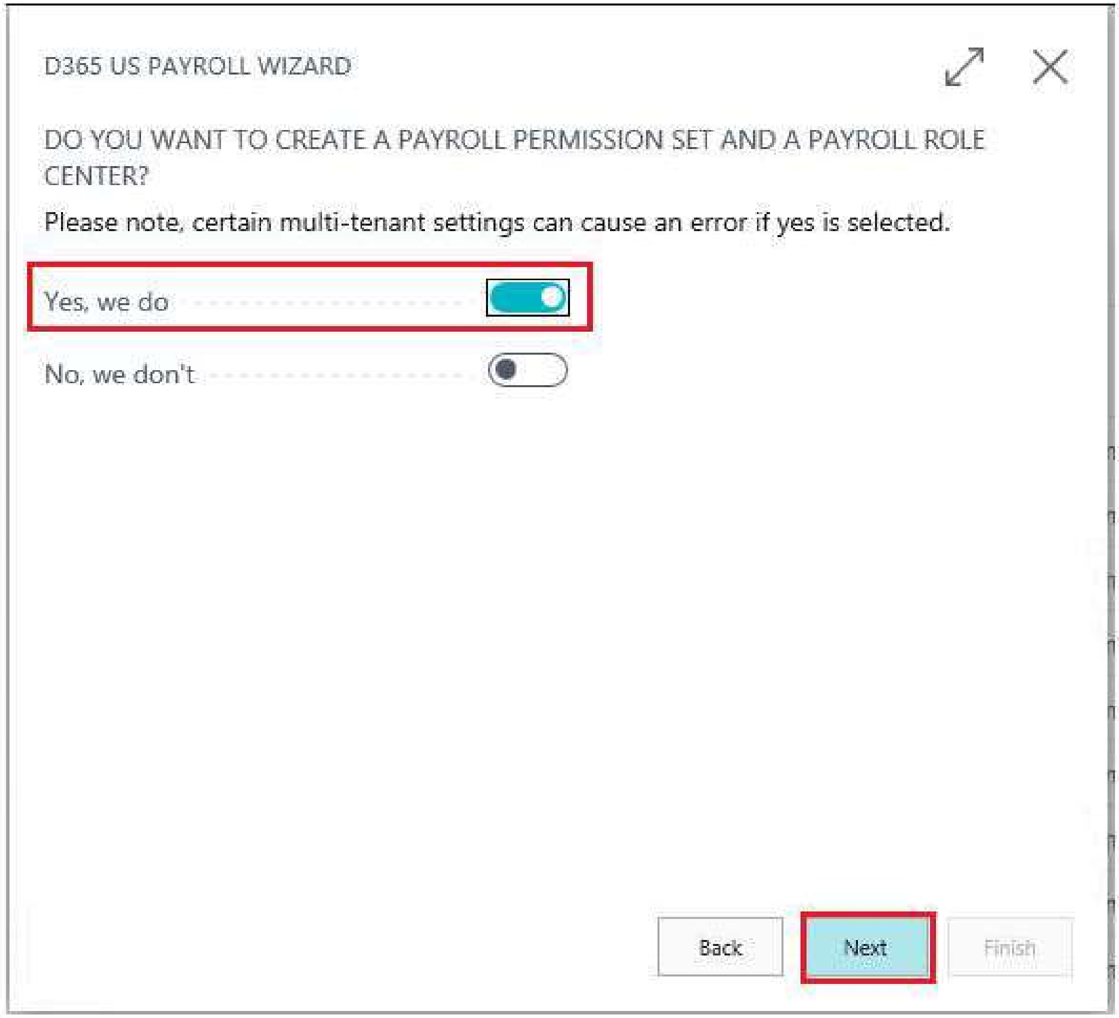


Step 4. “Choose Country”select ‘US’ from drop down. Then click ‘Next’



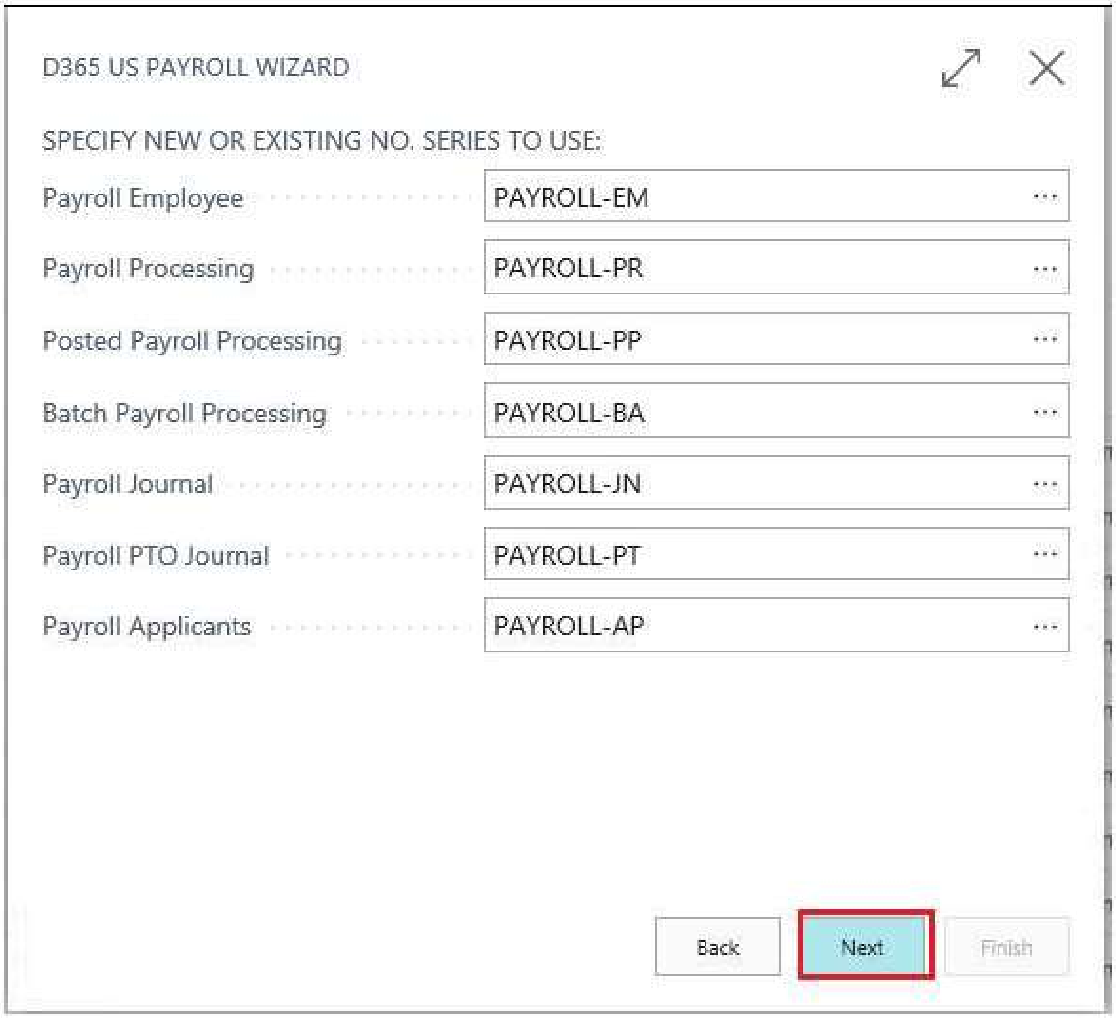
Step 5. “Do you want to create a Payroll Permission Set and a Payroll Role Center?”

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



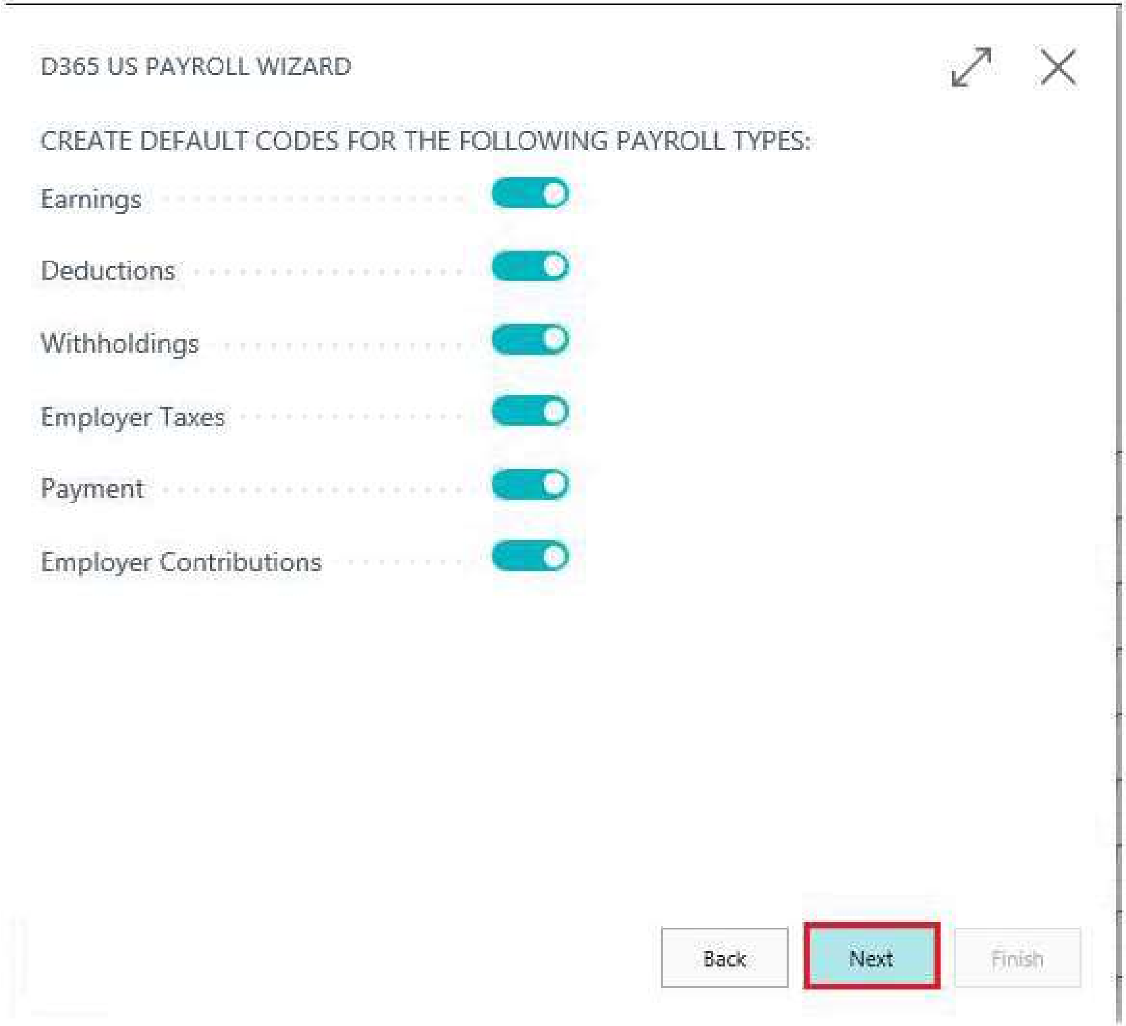
Step 6. "Specify New or Existing No. Series to Use"

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



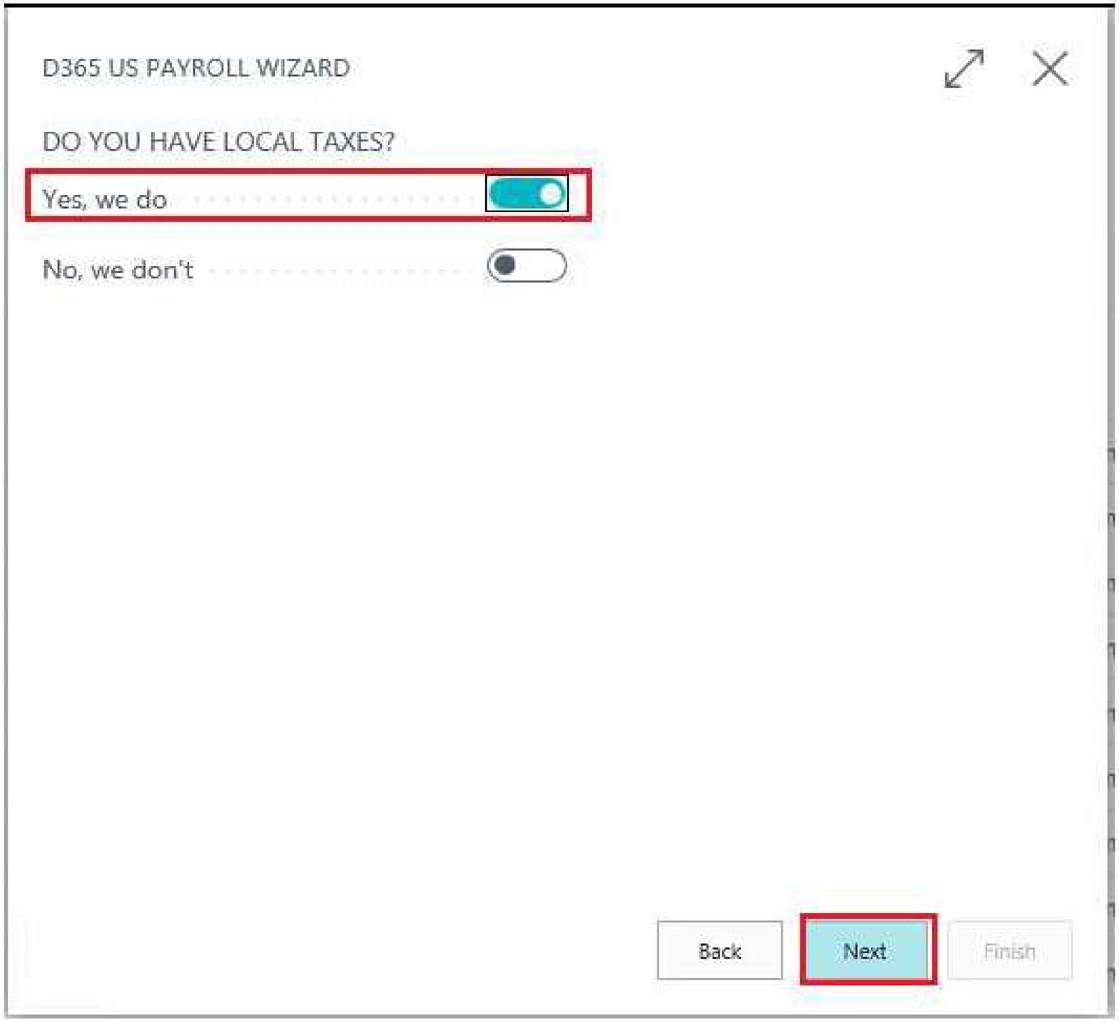
Step 7. “Create Default Codes for the Following Payroll Types:”

- **By default all options should be set to True.**
- **Click ‘Next’**



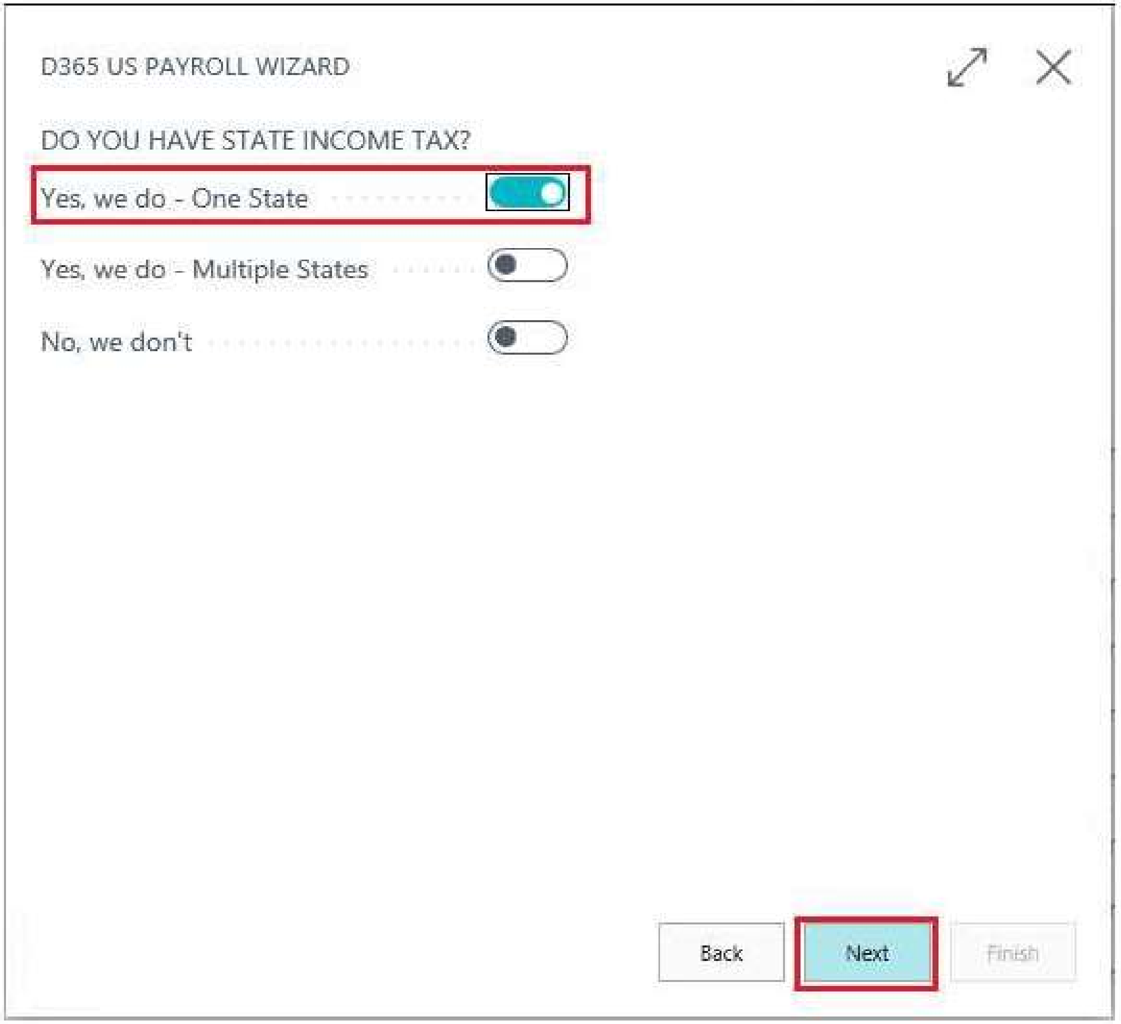
Step 8. "Do you have local taxes?"

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



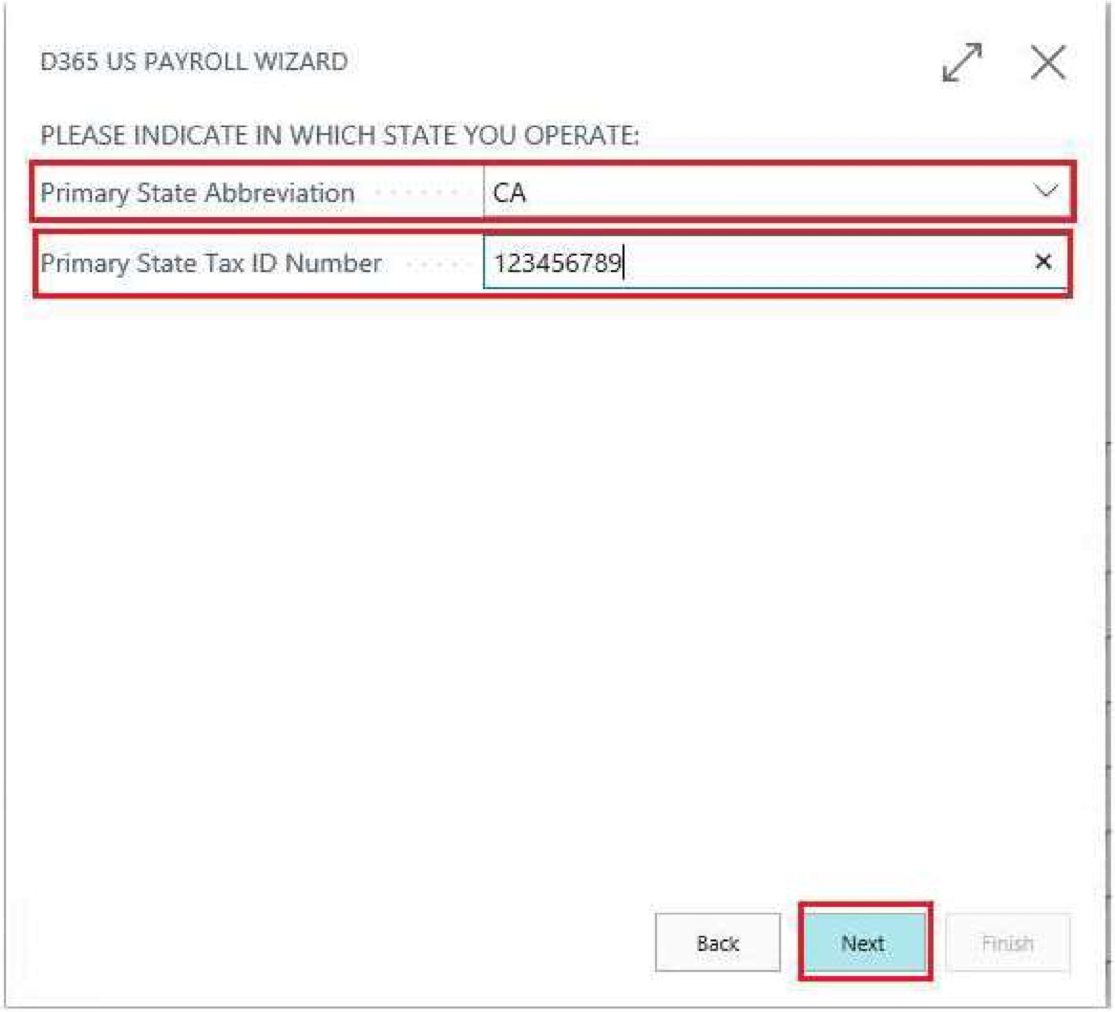
Step 9. “Do you have State Income Tax”

- **Set ‘Yes, we do – One State’ to True**
- **Click ‘Next’**



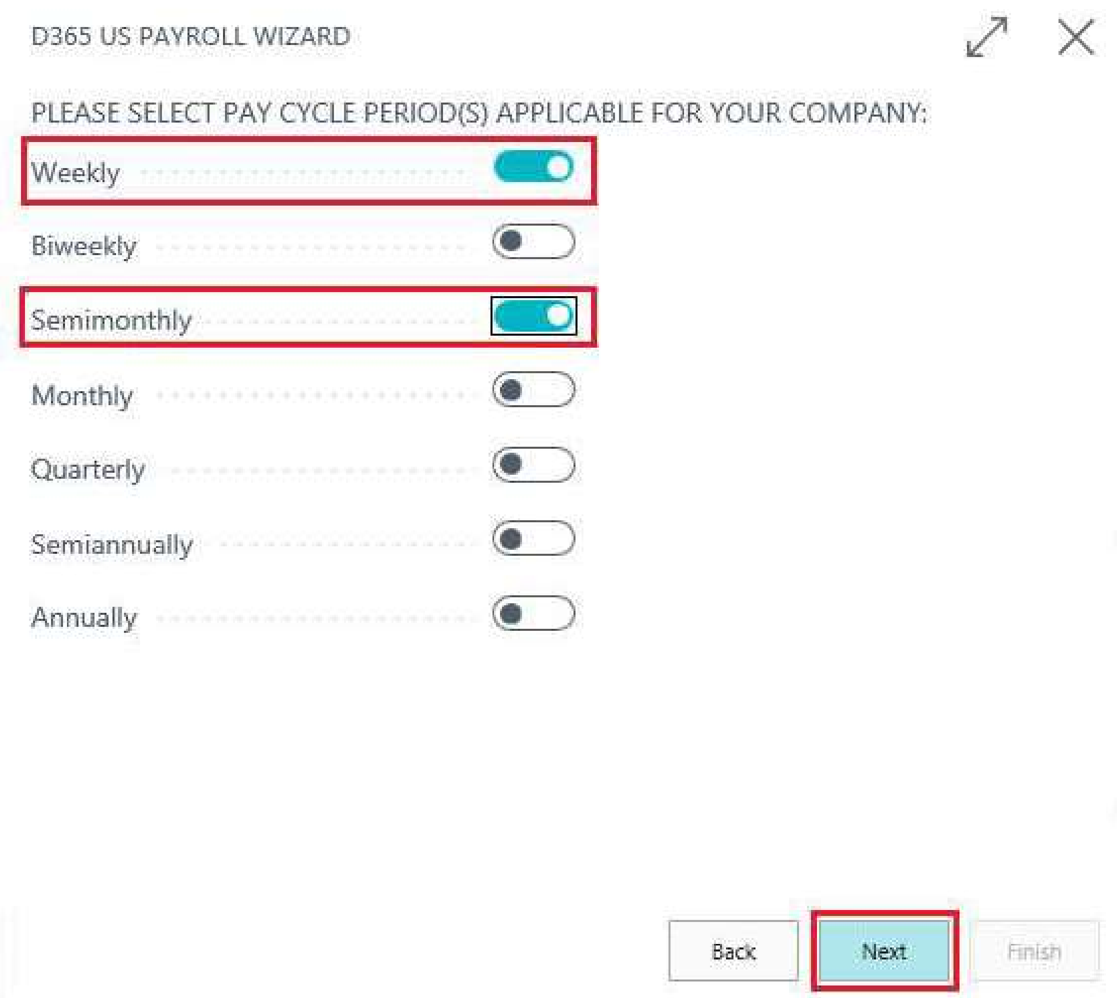
Step 10. "Please Indicate in which state you operate:"

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



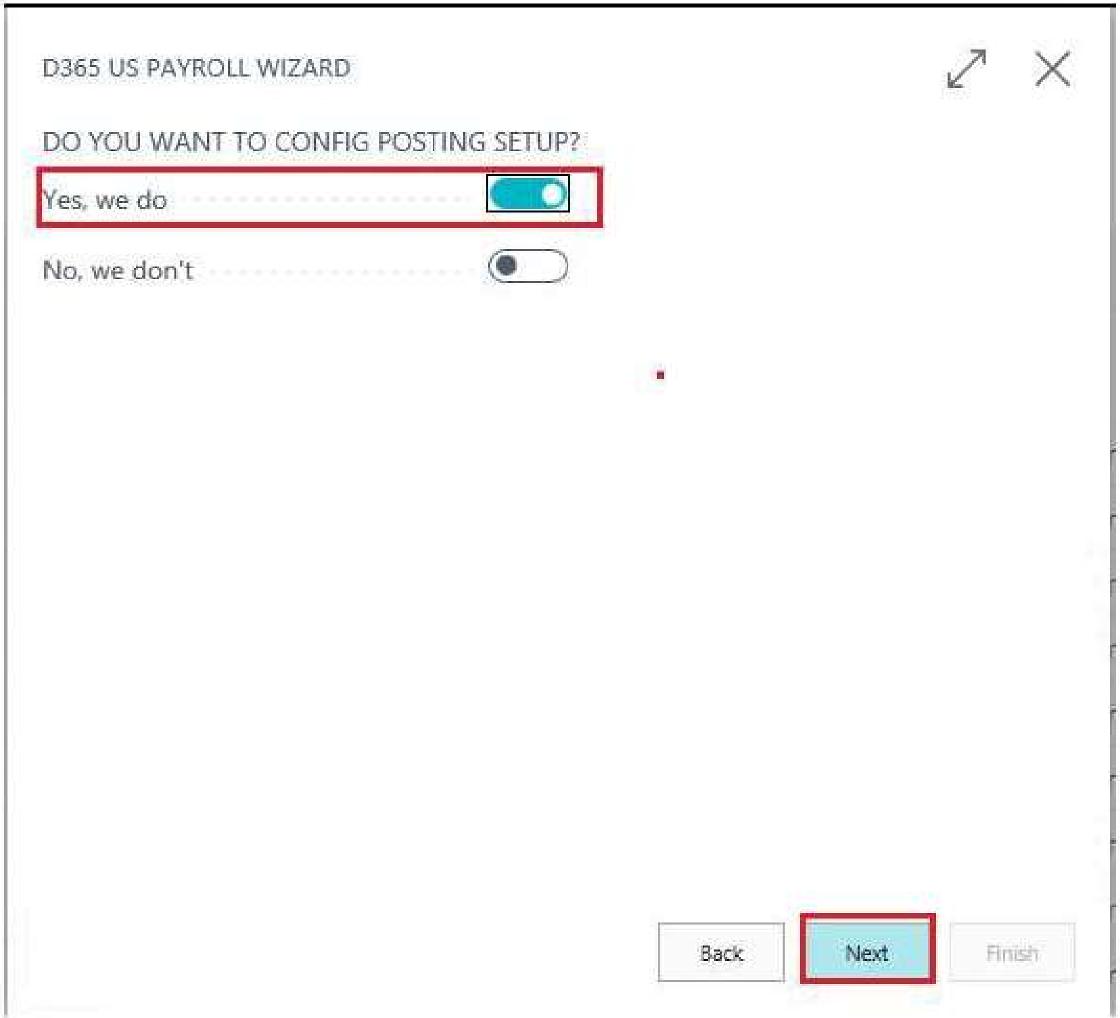
Step 11. “Please select pay cycle periods applicable for your company”

- **Set ‘Weekly’ to True**
- **Set ‘Semimonthly’ to True**
- **Click ‘Next’**



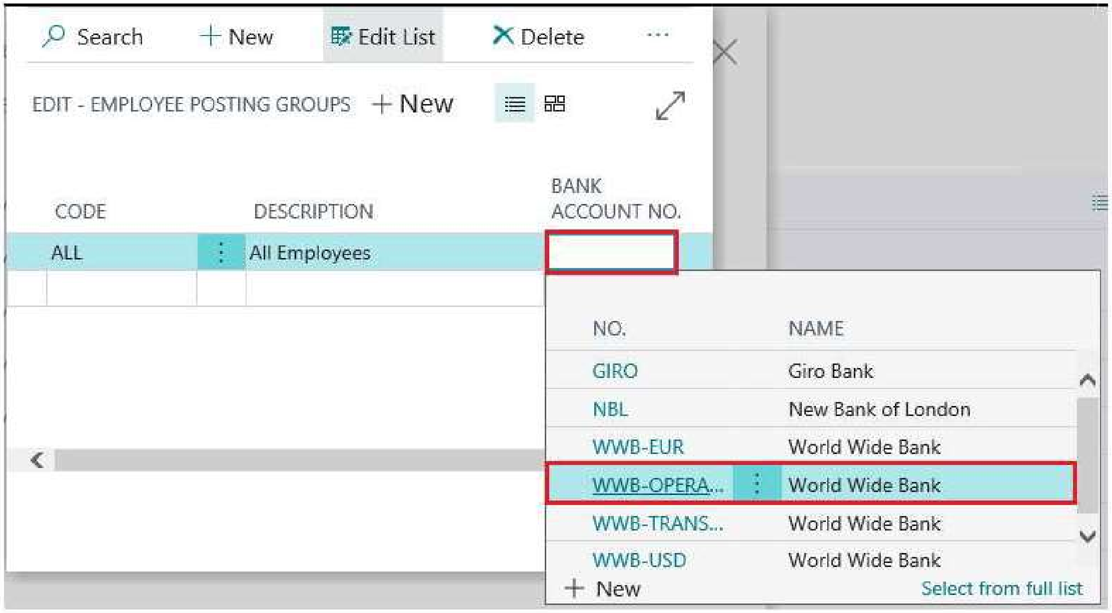
Step 12. “Do you want to Config Posting Setup?”

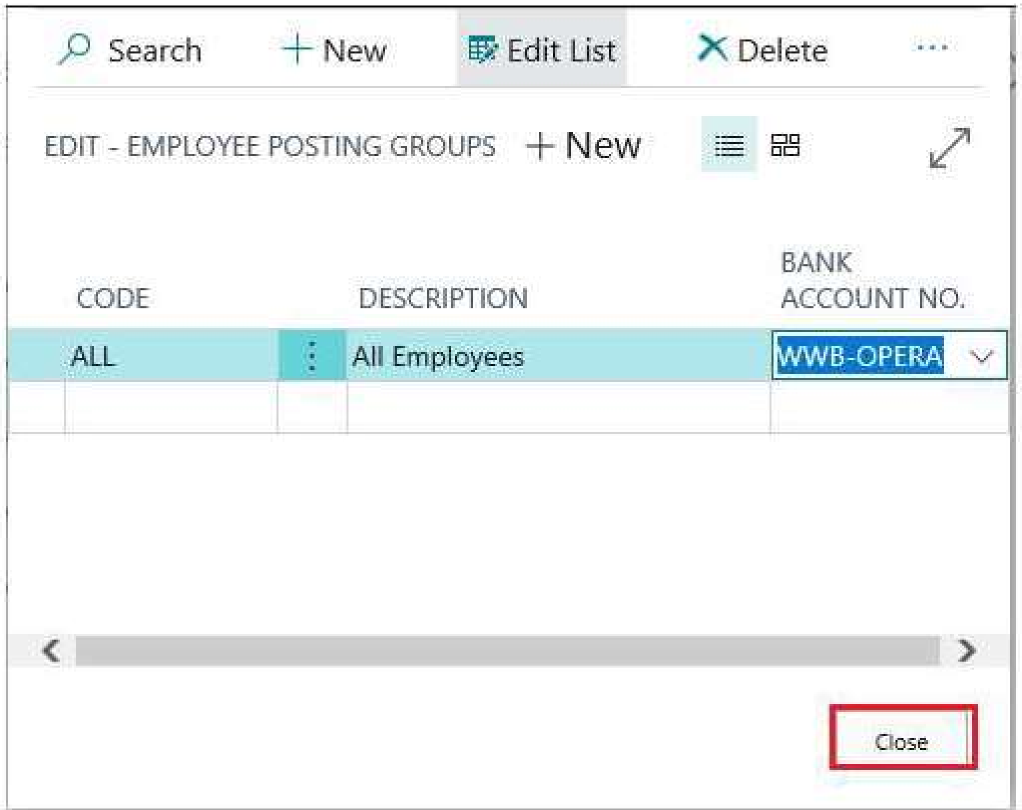
- **Set ‘Yes, we do’ to True**
- **Click ‘Next’**



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

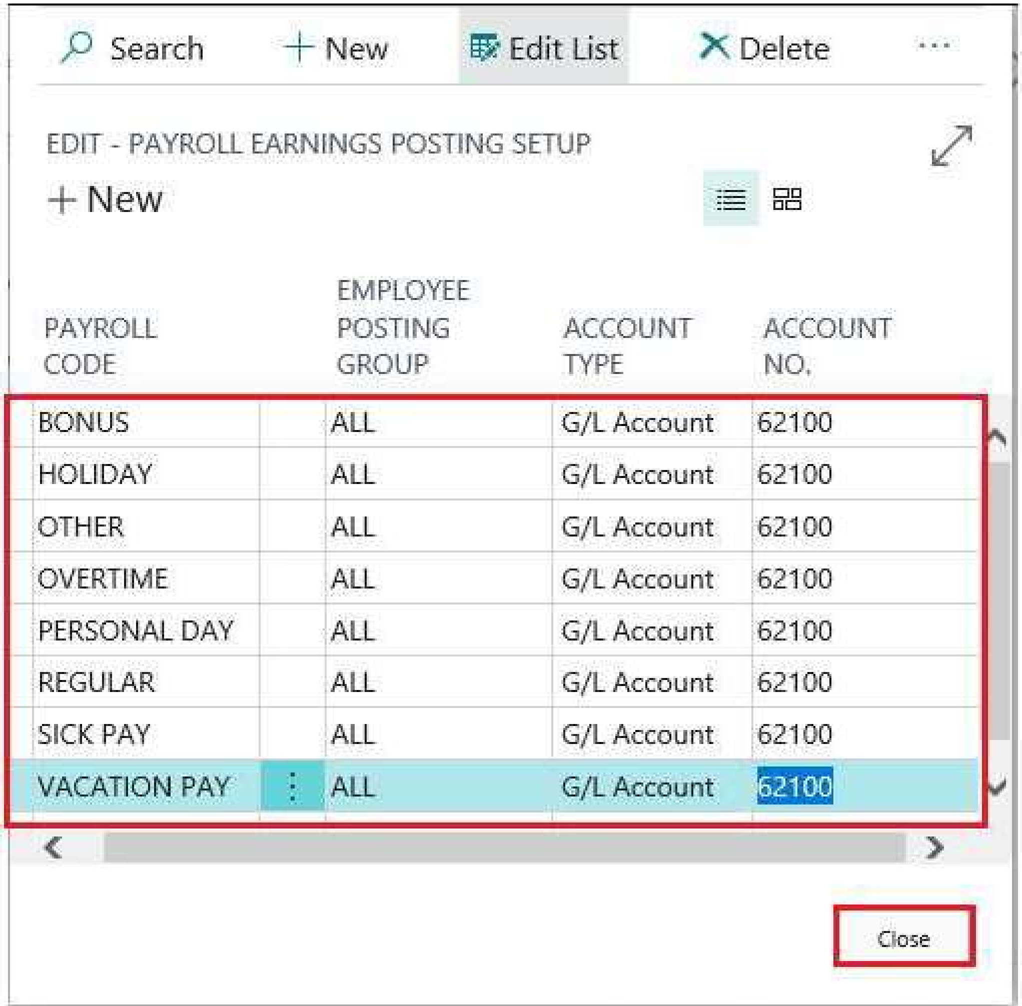
- **Set ‘Employee Posting Setup’ to True**
- **Employee Posting Groups Setup window will immediately pop up.**
- **Select ‘Bank Account No’ Field and select a bank account from drop down menu**
- **Click ‘Close’**


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



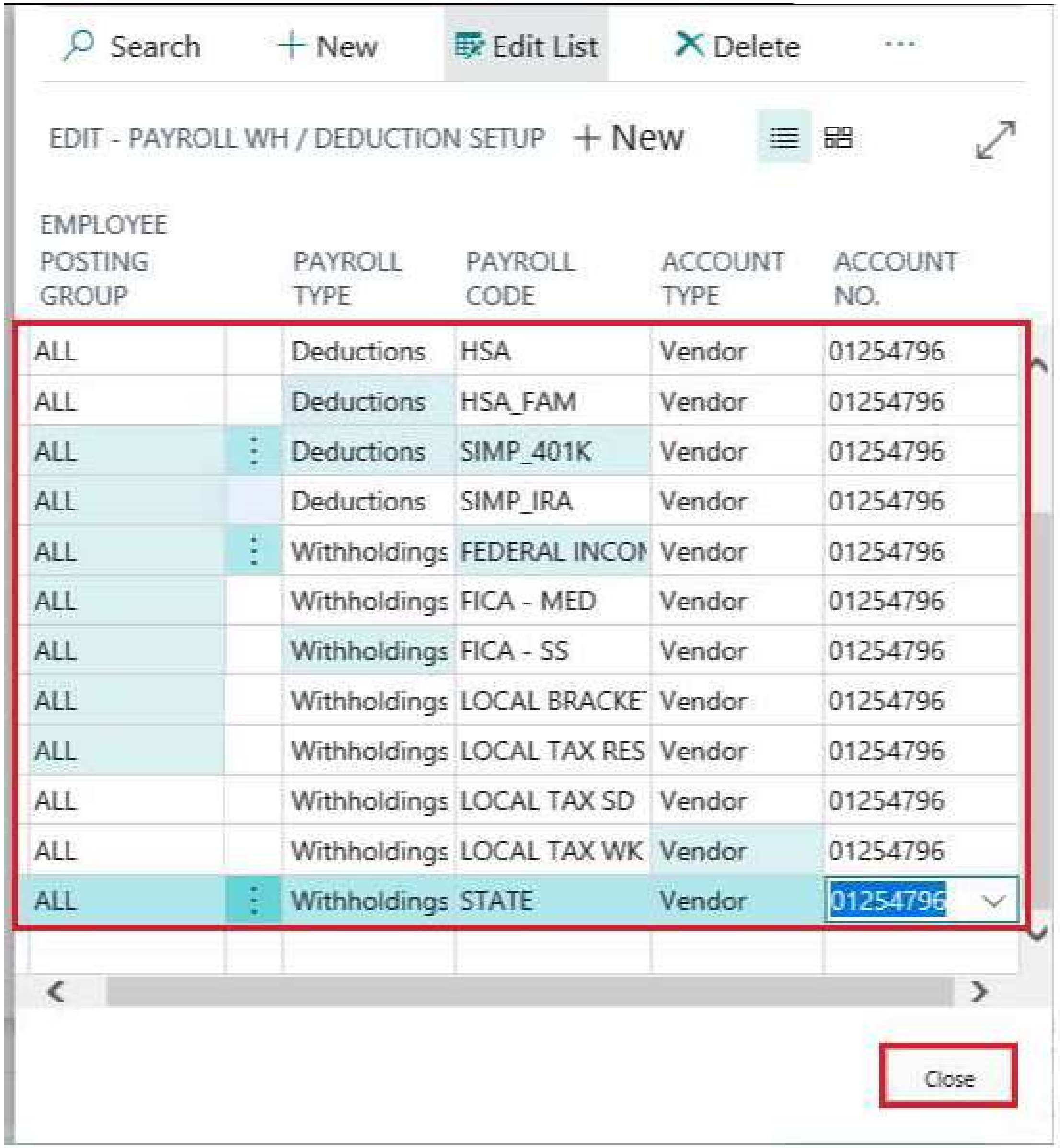
Step 14. "Please click on each checkbox and config related posting setup:"

- **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'**



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'**

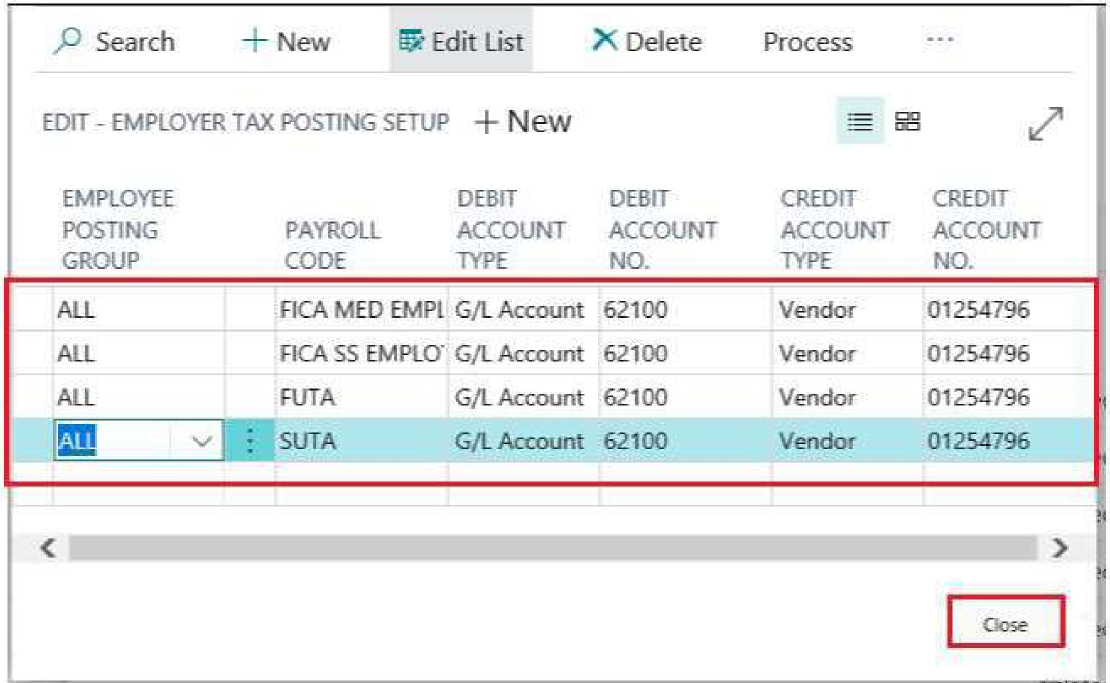


EMPLOYEE POSTING GROUP	PAYROLL TYPE	PAYROLL CODE	ACCOUNT TYPE	ACCOUNT NO.
ALL	Deductions	HSA	Vendor	01254796
ALL	Deductions	HSA_FAM	Vendor	01254796
ALL	Deductions	SIMP_401K	Vendor	01254796
ALL	Deductions	SIMP_IRA	Vendor	01254796
ALL	Withholdings	FEDERAL INCOI	Vendor	01254796
ALL	Withholdings	FICA - MED	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

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

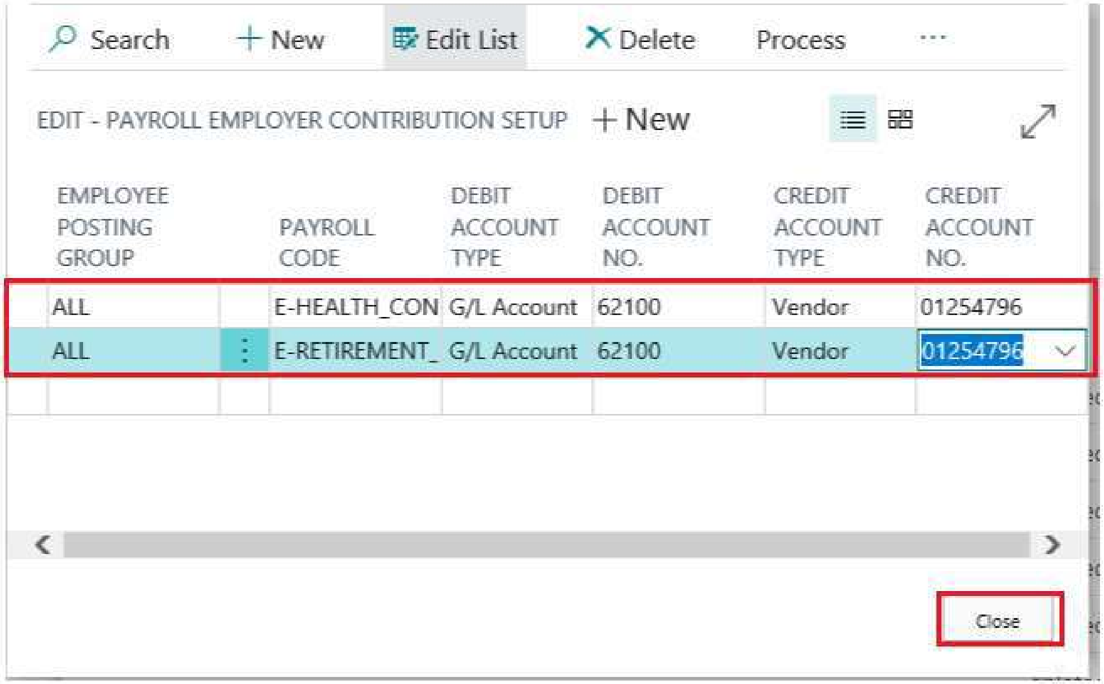
- **Set 'Payroll Employer Tax' to True**
- **Payroll Employer Tax Posting Setup window will immediately pop up.**
- **For 'Debit Account Type' select 'G/L Account' and for 'Debit Account No.' select an account #**
- **For 'Credit Account Type' Select 'Vendor' and for 'Debit Account No.' select an account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

- **Repeat this for all Payroll Employer Tax Codes**
- **Click ‘Close’**



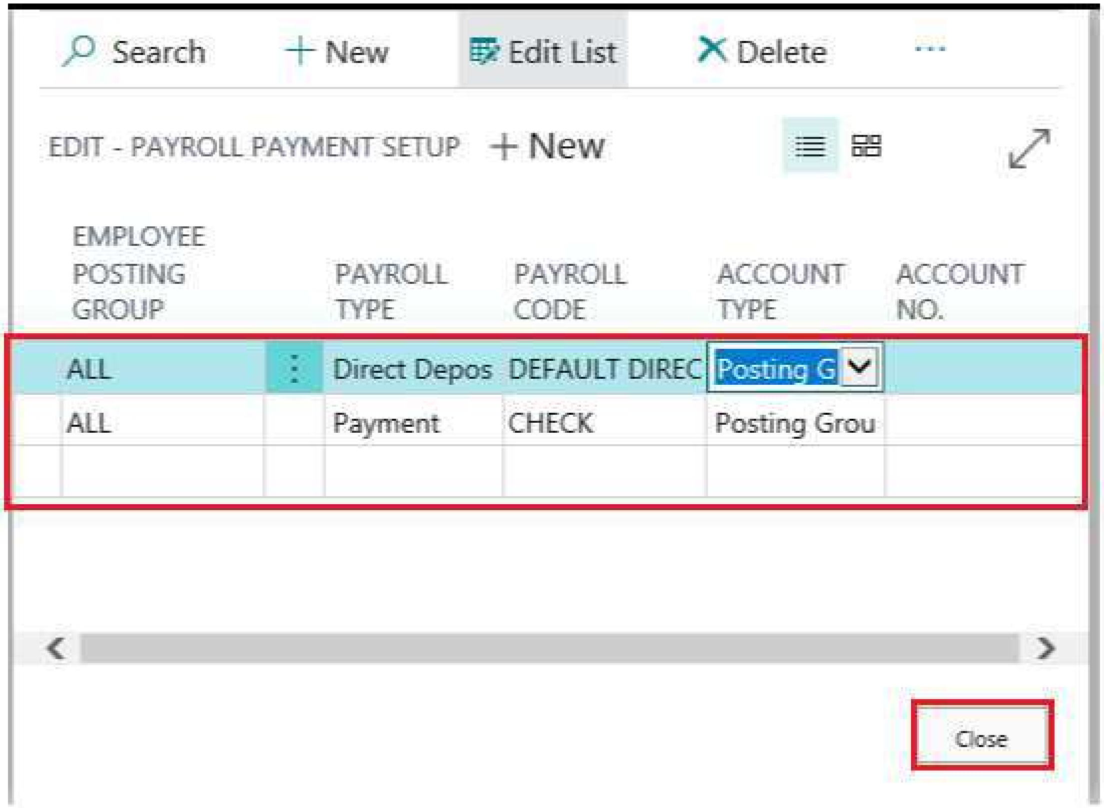
Step 17. “Please click on each checkbox and config related posting setup:”

- **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’**

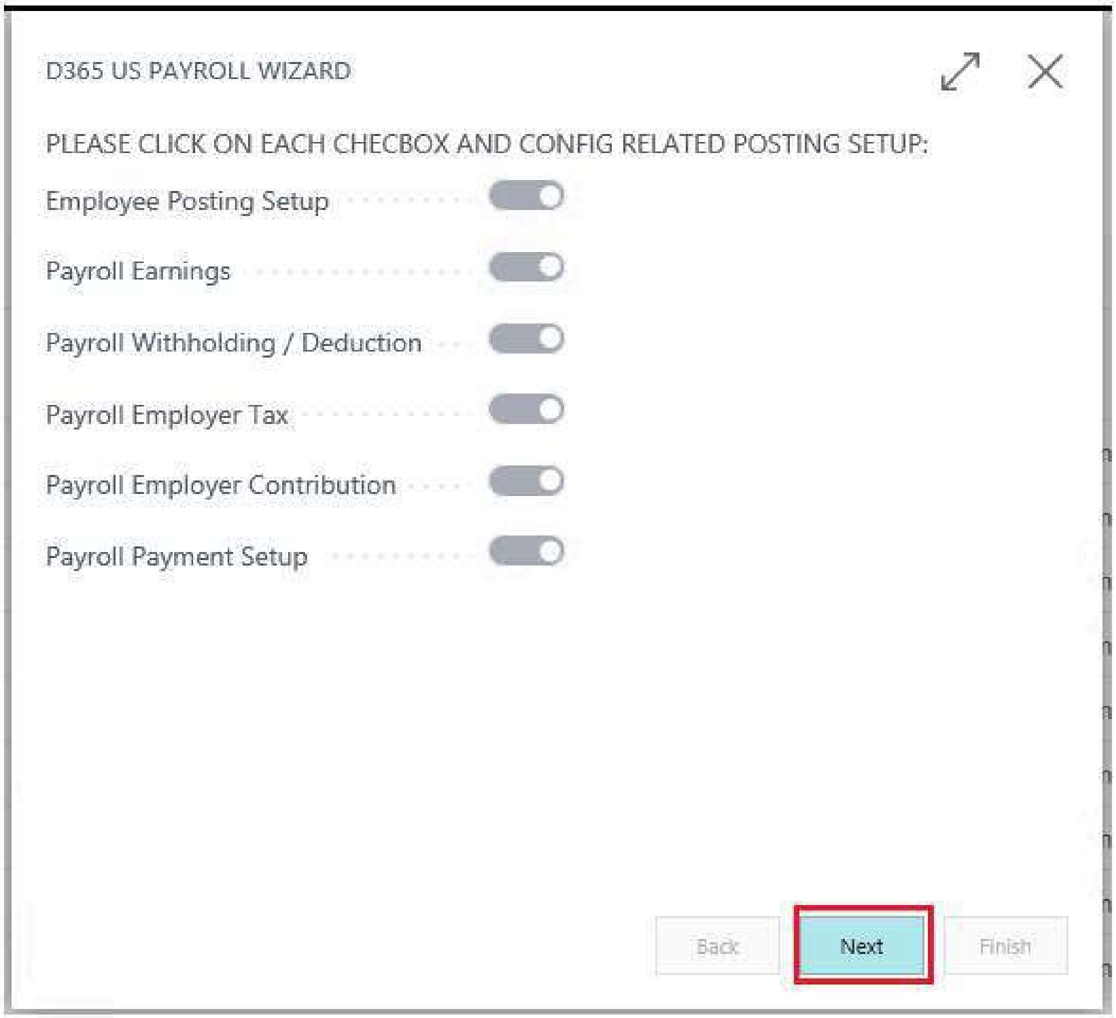


Step 18. “Please click on each checkbox and config related posting setup:”

- **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’**

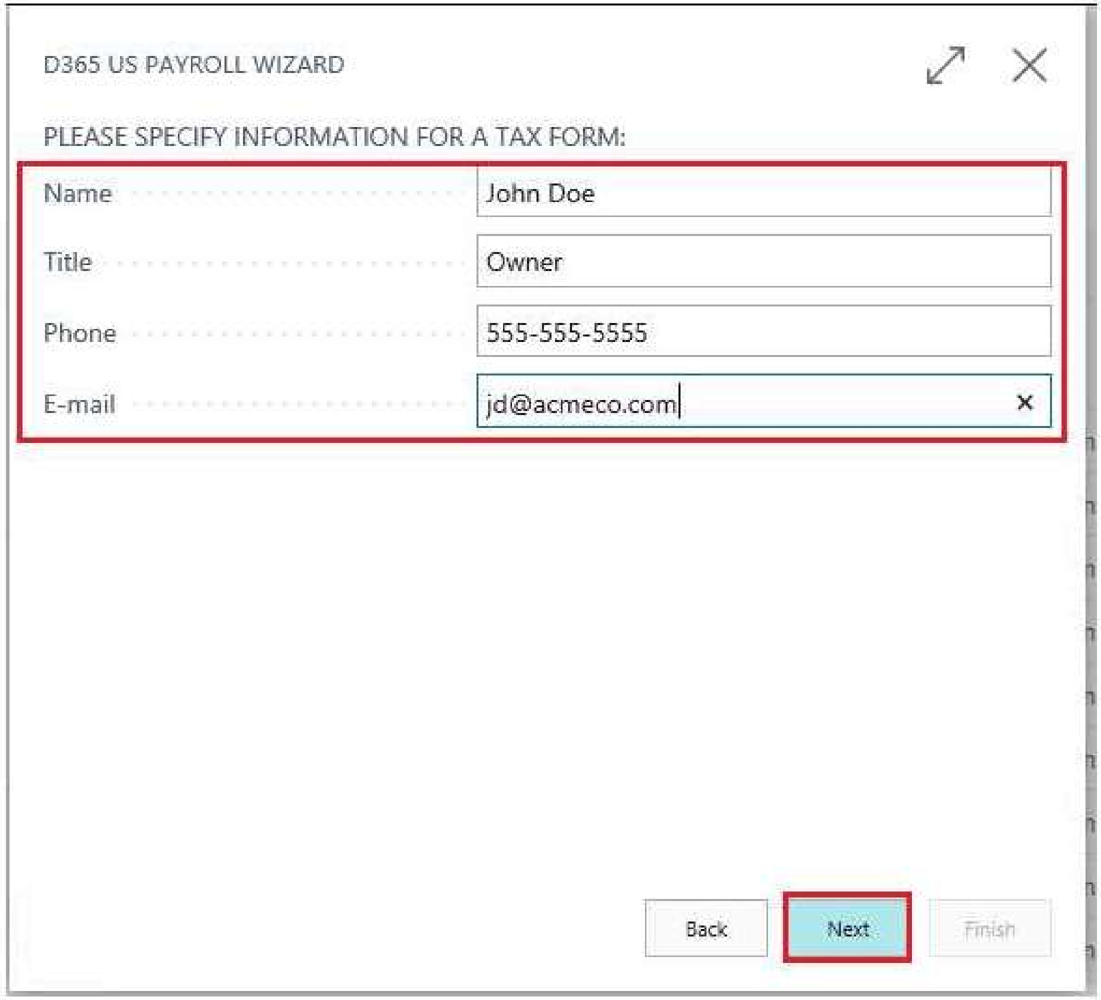


Step 19. The Posting Setups are complete. Click 'Next'



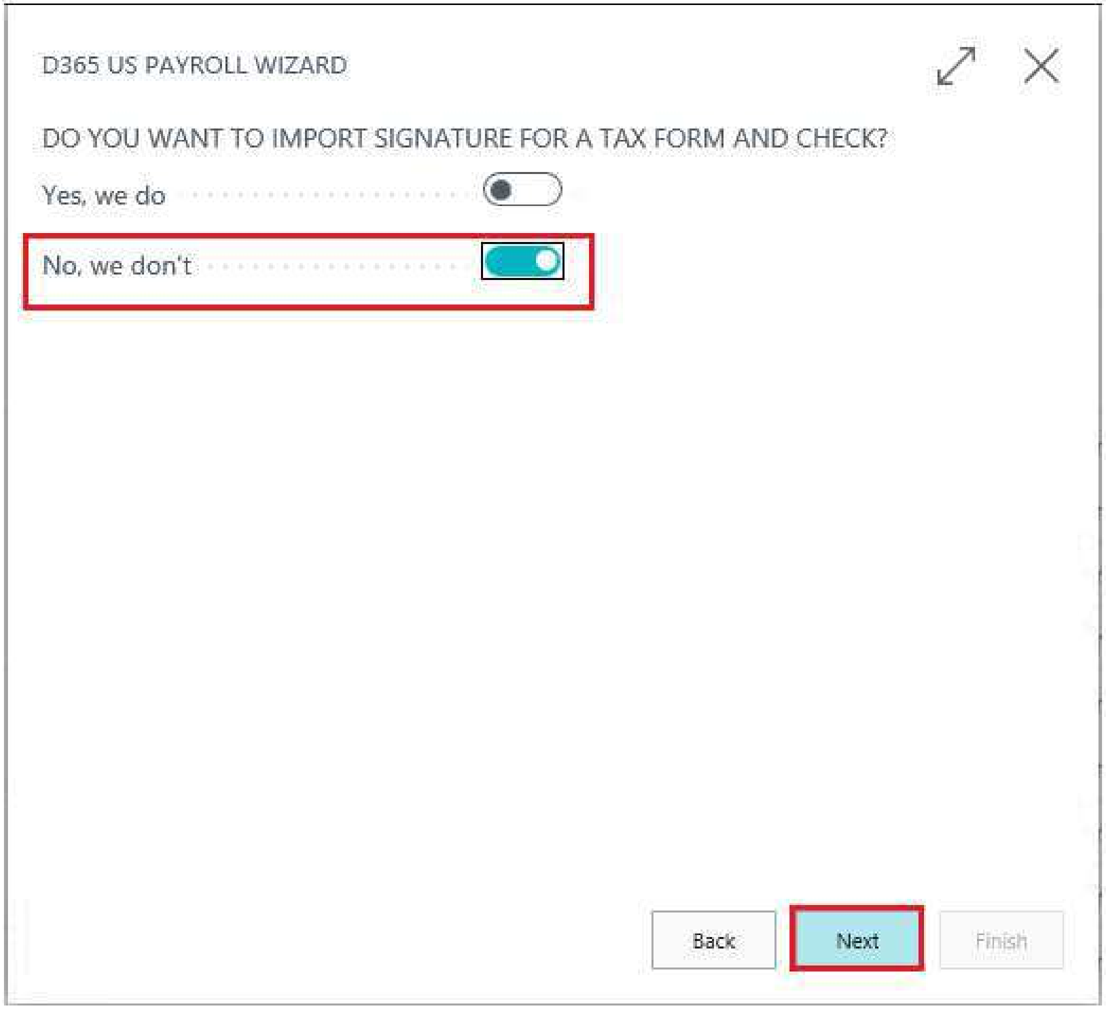
Step 20. “Please specify information for a tax form”:

- **Enter info that will appear on tax forms.**
- **Click ‘Next’**



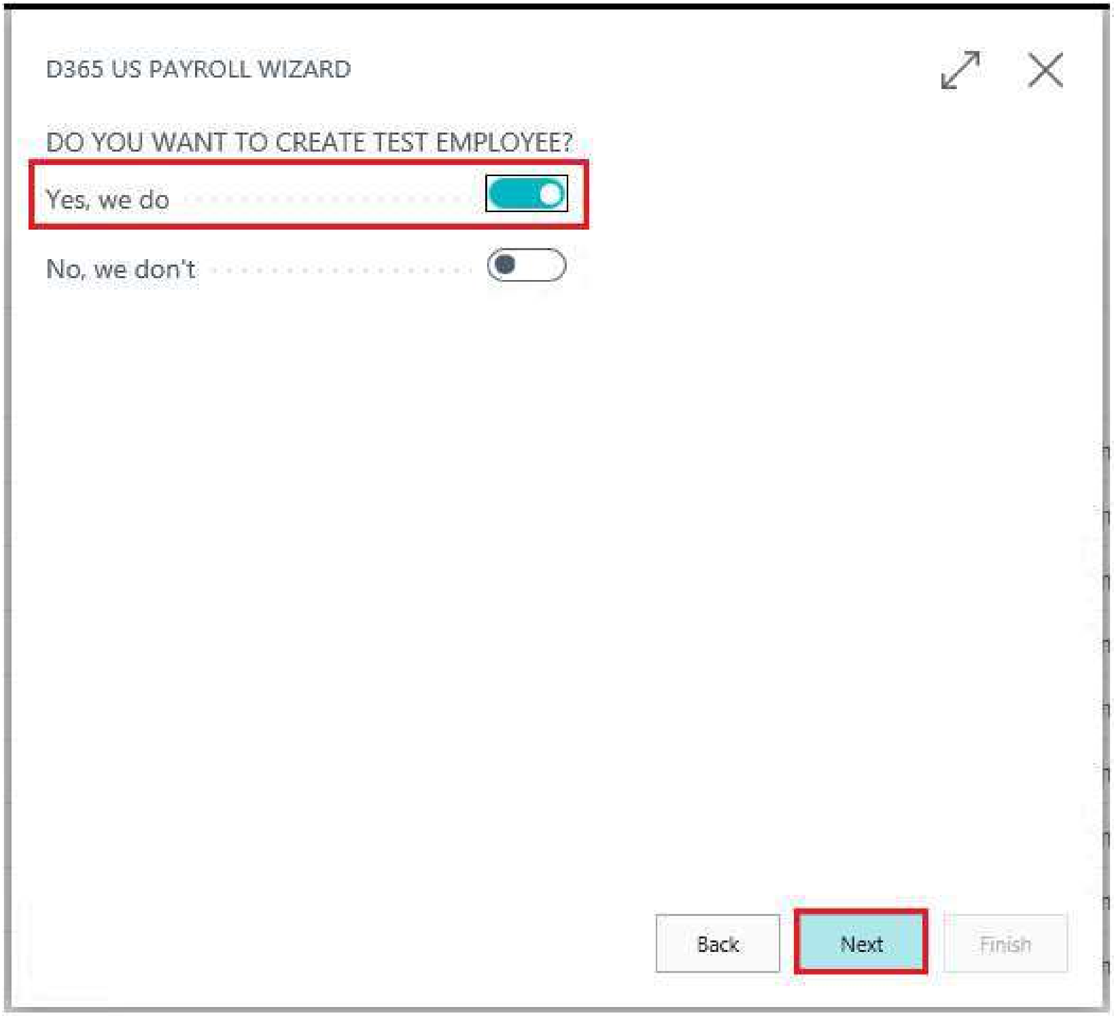
Step 21. "Do you want to import signature for a tax form and check?":

- **Set 'No, we don't' to True**
- **Click 'Next'**

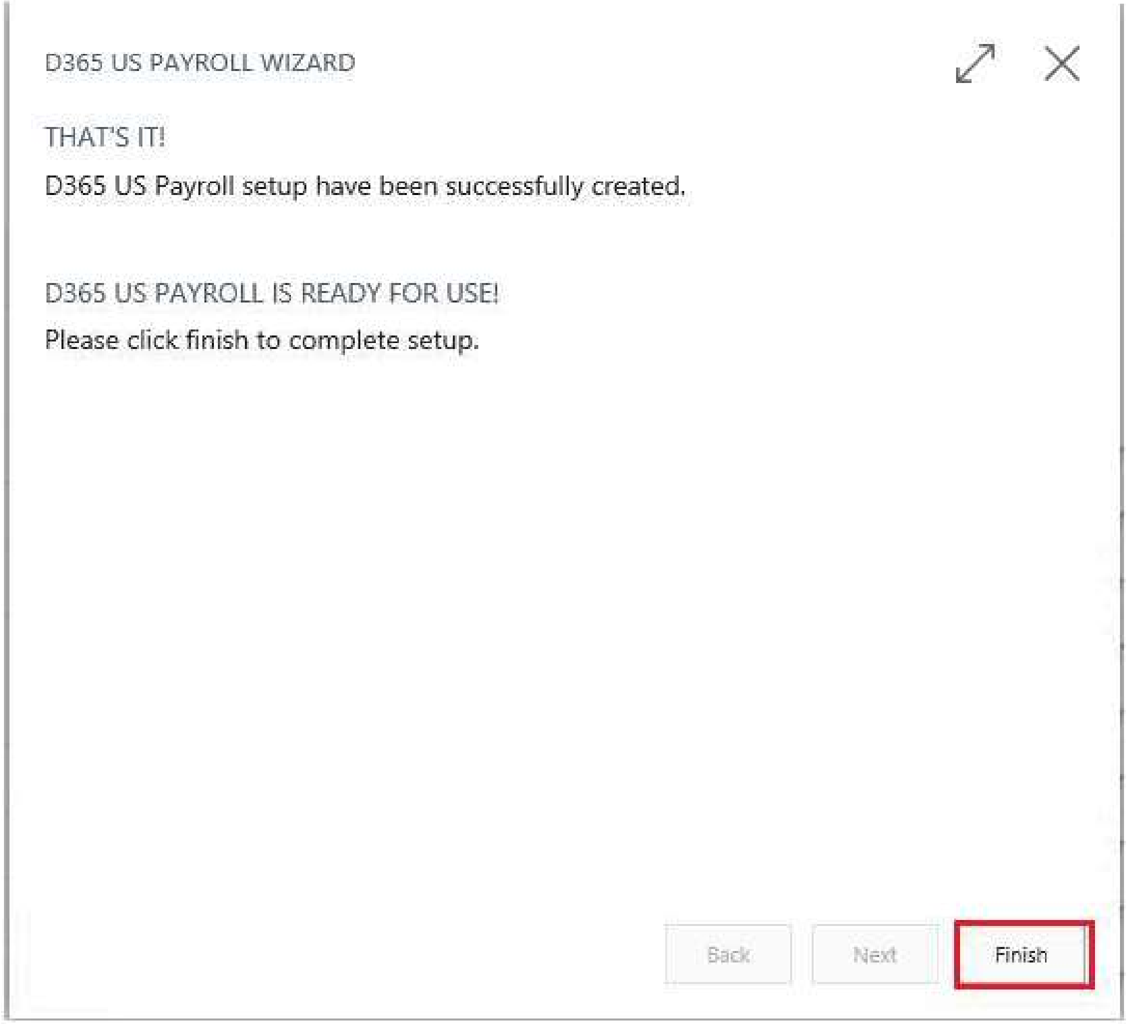


Step 22. "Do you want to create test employee?":

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



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