

Templates - Salary, PTO, Deductions

Modified on: Thu, 23 Dec, 2021 at 1:52 PM

Synopsis:

Payroll Now allows users to create and apply templates for PTO, Deductions and Salaries. This simplifies and streamlines the process of loading employees into the system. The templates can be applied via the 'Payroll Division' in the 'Create New Employee Wizard'.

TABLE OF CONTENTS

- [PTO Templates](#)
- [Deduction Templates](#)
- [Salary Templates](#)

[PTO Templates](#)

Step 1. Select 'Payroll Division Templates' then 'PTO Templates' from 'Setup Groups' Column in 'Full Payroll Menu'

Full Payroll Menu

Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	PTO Templates	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Deduction Templates	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Salary Templates	Payments
					HR Tracking Templates	

Step 2. 'Employee PTO Template List' screen will open. Click '+New'

←

Employee PTO Template List

Search **+ New** Manage Show Attached Open in Excel

PAYROLL DIVISION CODE	EARNINGS CODE	ACCRUAL STARTING DATE FORMULA	HOURS PER YEAR	YEAR CARRYOVER	ALLOW NEGATIVE HOURS	HOURS LIMIT
ADMIN	PERSONAL DAY	1D	40.00	☒	☒	120
WAREHOUSE	PERSONAL DAY	60D	40.00	☒	☐	80
WEEKLY	PERSONAL DAY	0D	0.00	☒	☐	80

Step 3. Employee PTO Template screen will open. Select 'Hourly' from the 'Payroll Division Code' drop down menu.

←

Employee PTO Template

Show Attached

General

Payroll Division Code: ▼ Hours Limit:

Earnings Code: ▼ Year Carryover: ☐

Allow Negative Hours: ☐ Over Hours Limit:

PTO Accrual Setup

Accrual Starting Date Formula: ▼ Per Year:

CODE	DESCRIPTION
ADMIN	Administration
HOURLY	Hourly Employees
SALARY	Salaried Employees
WAREHOUSE	Warehouse
WEEKLY	Weekly Employee Template

+ New [Select from full list](#)

Step 4. Select 'Personal Day' from 'Earnings Code' drop down menu

←

Employee PTO Template

Show Attached

General

Payroll Division Code: ▼ Hours Limit:

Earnings Code: ▼ Year Carryover: ☐

Allow Negative Hours: ☐ Over Hours Limit:

PTO Accrual Setup

Accrual Starting Date Formula: ▼ Per Year:

CODE	DESCRIPTION
BONUS	Bonus
OTHER	Other
PERSONAL DAY	Personal Day
SICK PAY	Sick Pay
VACATION PAY	Vacation Pay

+ New [Select from full list](#)

Step 5. Set 'Allow Negative Hours' to False.



Employee PTO Template

Show Attached



General

Payroll Division Code	HOURLY	Hours Limit	0
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	0

PTO Accrual Setup

Accrual Starting Date Formula		Hours per Year	0.00
-------------------------------	--	----------------	------

Step 6. Enter an 'Hours Limit' of 80 hours



Employee PTO Template

Show Attached



General

Payroll Division Code	HOURLY	Hours Limit	80
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	0

PTO Accrual Setup

Accrual Starting Date Formula		Hours per Year	0.00
-------------------------------	--	----------------	------

Step 7. Set 'Year Carryover' to True.



Employee PTO Template

Show Attached



General

Payroll Division Code	HOURLY	Hours Limit	80
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	0

PTO Accrual Setup

Accrual Starting Date Formula		Hours per Year	0.00
-------------------------------	--	----------------	------

Step 8. Enter 'Carryover Hours Limit' of 80 hours.



Employee PTO Template

Show Attached



General

Payroll Division Code	HOURLY	Hours Limit	80
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	80

PTO Accrual Setup

Accrual Starting Date Formula		Hours per Year	0.00
-------------------------------	--	----------------	------

Step 9. Enter 'Accrual Starting Date Formula' of '1D' and 'Hours per Year' of 40



Employee PTO Template

Show Attached 

General

Payroll Division Code	HOURLY	Hours Limit	80
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	80

PTO Accrual Setup

Accrual Starting Date Formula	1D	Hours per Year	40.00
-------------------------------	---------------------------------	----------------	------------------------------------

Step 10. Click 'Back' button to save the Hourly PTO Template



Employee PTO Template

Show Attached 

General

Payroll Division Code	HOURLY	Hours Limit	80
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☐	Carryover Hours Limit	80

PTO Accrual Setup

Accrual Starting Date Formula	1D	Hours per Year	40.00
-------------------------------	---------------------------------	----------------	------------------------------------

Step 11. Review the saved template in the 'Employee PTO Template List'



Employee PTO Template List

Search	+ New	Manage	Show Attached	Open in Excel		
PAYROLL DIVISION CODE	EARNINGS CODE	ACCRUAL STARTING DATE FORMULA	HOURS PER YEAR	YEAR CARRYOVER	ALLOW NEGATIVE HOURS	HOURS LIMIT
ADMIN	PERSONAL DAY	1D	40.00	☒	☒	120
WAREHOUSE	PERSONAL DAY	60D	40.00	☒	☐	80
WEEKLY	PERSONAL DAY	0D	0.00	☒	☐	80
HOURLY	PERSONAL DAY	1D	40.00	☒	☐	80

Step 12. Repeat this process for the 'Salary' payroll division with the following parameters:

- **Allow Negative Hours 'True'**
- **Hours Limit '120'**
- **Year Carryover 'True'**
- **Carryover Hours Limit '120'**
- **Accrual Starting Date Formula '1D'**
- **Hours per Year '80'**



Employee PTO Template

Show Attached

General

Payroll Division Code	SALARY	Hours Limit	120
Earnings Code	PERSONAL DAY	Year Carryover	☒
Allow Negative Hours	☒	Carryover Hours Limit	120

PTO Accrual Setup

Accrual Starting Date Formula	1D	Hours per Year	80.00
-------------------------------	----	----------------	-------

PTO Lump Sum Setup >

Step 13. Review both templates in 'Employee PTO Template List'



Employee PTO Template List

Search + New Manage Show Attached Open in Excel							
☐	PAYROLL DIVISION CODE	EARNINGS CODE	ACCRUAL STARTING DATE FORMULA	HOURS PER YEAR	YEAR CARRYOVER	ALLOW NEGATIVE HOURS	HOURS LIMIT
☐	ADMIN	PERSONAL DAY	1D	40.00	☒	☒	120
☐	WAREHOUSE	PERSONAL DAY	60D	40.00	☒	☐	80
☐	WEEKLY	PERSONAL DAY	0D	0.00	☒	☐	80
☒	HOURLY	PERSONAL DAY	1D	40.00	☒	☐	80
☒	SALARY	PERSONAL DAY	1D	80.00	☒	☒	120

Deduction Templates

Step 1. Select 'Payroll Division Templates' then 'Deduction Templates' from Setup Groups column in 'Full Payroll Menu'

Full Payroll Menu

Payroll Processing	Reports	History	Periodic Activities	Setup	Setup Groups	Posting Setup
Payroll Employees	Payroll Report	Posted Payroll	Periodic Processing..	Payroll Setup	Additional Setups..	Employee Posting Groups
Payroll Processing	US Tax Reports..	Payroll Ledger Entries	Financial Periodic Activities..	Payroll Codes	HR Setup..	Earnings
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Report Setup..	Withholdings / Deductions
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Process Procedures..	Employer Taxes
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Payroll Division Templates..	Employer Contributions
PTO Management..	Field Select. Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	PTO Templates	Reimbursements
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Deduction Templates	Payment Advances
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Salary Templates	Payments
					HR Tracking Templates	

Step 2. The 'Payroll Emp. Deduction Template List' will open. Click '+New'

Payroll Emp. Deduction Template List

Search **+ New** Manage Show Attached Open in Excel

PAYROLL DIVISION CODE	DEDUCTION TEMPLATE CODE	PAYROLL CODE	DESCRIPTION	TEMPLATE DESCRIPTION	AVAILABLE ON WEB PORTAL
ADMIN	ADMINBEN	401KPLAN	401K Plan	Administrative Benefits	☐
ADMIN	ADMINBEN	HEALTH INSURANCE	Health Insurance	Admin Benefits	☐
WAREHOUSE	WAREHOUSEBEN	HEALTH INSURANCE	Health Insurance	Warehouse Benefits	☐
WEEKLY		401KPLAN	401K Plan		☒

Step 3. The 'Employee Deduction Template' screen opens. Select 'Hourly' from the Payroll Division Code Menu

EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code ▼ Starting Date Formula

Deduction Template Code Date Formula

Template Description Available on Web Portal ☐

Payroll Code
 CODE DESCRIPTION
 ADMIN Administration
HOURLY Hourly Employees
 SALARY Salaried Employees
 WAREHOUSE Warehouse
 WEEKLY Weekly Employee Template
 + New [Select from full list](#)

Employee Deduction Setup

Description Amount / Percent

Amount Formula

Step 4. Select 'Health Insurance' from Payroll Code drop down menu

EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code: HOURLY Starting Date Formula: Ending Date Formula: Template Description: Available on Web Portal: ☐

Payroll Code: **HEALTH INSURANCE**

Employee Deduction Setup

CODE	DESCRIPTION	Amount / Percent
401KPLAN	401K Plan	
403BPLAN	403b Plan	
FISCAL YEAR...	Fiscal Year V	
FSA	Flexible Spending Account	
HEALTH INSU...	Health Insurance	0.00
HSA	Health Savings Account	

Employer Contribution Setup: + New [Select from full list](#)

Step 5. Enter 'Starting Date Formula' of 1D and set 'Available on Web Portal' to False.

EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code: HOURLY Starting Date Formula: 1D Ending Date Formula: Template Description: Available on Web Portal: ☐

Payroll Code: HEALTH INSURANCE

Employee Deduction Setup

Description: Health Insurance Amount / Percent: 0.00

Amount Formula: % of Gross Wages

Step 6. Select 'Fixed Amount' for 'Amount Formula' and enter '20' in 'Amount / Percent'

← EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code: HOURLY Starting Date Formula: 1D

Deduction Template Code: Ending Date Formula:

Template Description: Available on Web Portal: ☒

Payroll Code: HEALTH INSURANCE

Employee Deduction Setup

Description: Health Insurance Amount / Percent: 20.00

Amount Formula: Fixed Amount

Step 7. Click 'Back' button to save Deduction Template

← EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code: HOURLY Starting Date Formula: 1D

Deduction Template Code: Ending Date Formula:

Template Description: Available on Web Portal: ☒

Payroll Code: HEALTH INSURANCE

Employee Deduction Setup

Description: Health Insurance Amount / Percent: 20.00

Amount Formula: Fixed Amount

Step 8. Repeat this process for the 'Salary' payroll division with the following parameters:

- Payroll Code '401KPlan'
- Starting Date Formula '1D'
- Available on Web Portal set to 'False'
- Amount Formula 'Fixed Amount'
- Amount / Percent '50'

EMPLOYEE DEDUCTION TEMPLATE

Deduction

Show Attached

General

Payroll Division Code SALARY

Deduction Template Code

Template Description

Payroll Code 401KPLAN

Starting Date Formula 1D

Ending Date Formula

Available on Web Portal ☐

Employee Deduction Setup

Description 401K Plan

Amount Formula Fixed Amount

Amount / Percent 50.00

Step 9. Review both templates in 'Payroll Emp. Deduction Template List'

←

Payroll Emp. Deduction Template List

Search + New Manage Show Attached Open in Excel

☐	PAYROLL DIVISION CODE	DEDUCTION TEMPLATE CODE	PAYROLL CODE	DESCRIPTION	TEMPLATE DESCRIPTION	AVAILAB... ON WEB PORTAL
☐	ADMIN	ADMINBEN	401KPLAN	401K Plan	Administrative Benefits	☐
☐	ADMIN	ADMINBEN	HEALTH INSURANCE	Health Insurance	Admin Benefits	☐
☐	WAREHOUSE	WAREHOUSEBEN	HEALTH INSURANCE	Health Insurance	Warehouse Benefits	☐
☐	WEEKLY		401KPLAN	401K Plan		☒
☒	HOURLY		HEALTH INSURANCE	Health Insurance		☐
☒	SALARY		401KPLAN	401K Plan		☐

Salary Templates

Step 1. Select 'Payroll Division Templates' then 'Salary Templates' in Setup Groups column of 'Full Payroll Menu'



Step 2. The 'Employee Salary Template List' will open. Click '+New'

←

Employee Salary Template List

SEARCH	NEW	MANAGE	SHOW ATTACHED	OPEN IN EXCEL
PAYROLL DIVISION CODE	PAY CYCLE	SALARY TYPE	ANNUAL SALARY	
ADMIN	Semimonthly	Salary	75,000.00	
WAREHOUSE	Weekly	Hourly	24,960.00	
WEEKLY	Weekly	Salary	60,000.00	

Step 3. The 'Employee Salary Template' screen opens. Select 'Hourly' from the Payroll Division Code Menu

←  + 

Employee Salary Template

Show Attached 

Salary Setup

Payroll Division Code	▼	Rate per Hour	0.00														
Pay Cycle	<table><thead><tr><th>CODE</th><th>DESCRIPTION</th></tr></thead><tbody><tr><td>ADMIN</td><td>Administration</td></tr><tr><td>HOURLY</td><td>Hourly Employees</td></tr><tr><td>SALARY</td><td>Salaried Employees</td></tr><tr><td>WAREHOUSE</td><td>Warehouse</td></tr><tr><td>WEEKLY</td><td>Weekly Employee Template</td></tr><tr><td colspan="2">+ New Select from full list</td></tr></tbody></table>	CODE	DESCRIPTION	ADMIN	Administration	HOURLY	Hourly Employees	SALARY	Salaried Employees	WAREHOUSE	Warehouse	WEEKLY	Weekly Employee Template	+ New Select from full list		Salary	0.00
CODE	DESCRIPTION																
ADMIN	Administration																
HOURLY	Hourly Employees																
SALARY	Salaried Employees																
WAREHOUSE	Warehouse																
WEEKLY	Weekly Employee Template																
+ New Select from full list																	
Salary Type		Hours Details	☐														

Step 4. Select 'Weekly' from Pay Cycle menu

←  + 

Employee Salary Template

Show Attached 

Salary Setup

Payroll Division Code	HOURLY ▼	Rate per Hour	0.00
Pay Cycle	Weekly	Annual Salary	0.00
Salary Type	Biweekly Semimonthly Monthly Quarterly Semiannually Annually Daily or Misc	Use Hours Details	☐

Step 5. Select 'Hourly' for Salary Type

←  + 

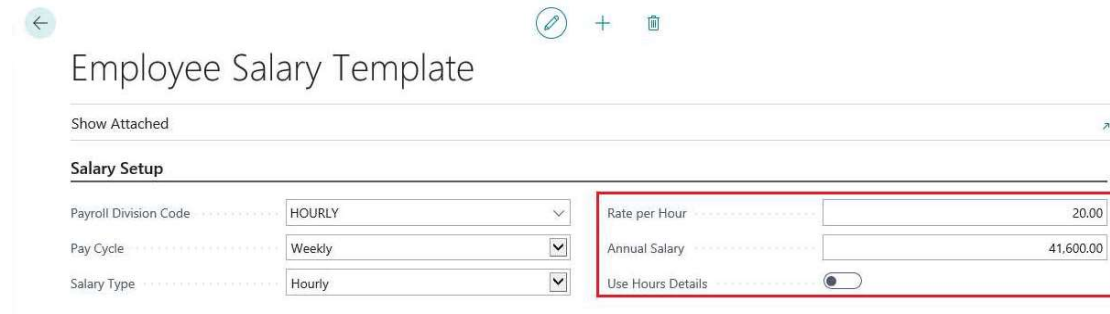
Employee Salary Template

Show Attached 

Salary Setup

Payroll Division Code	HOURLY ▼	Rate per Hour	0.00
Pay Cycle	Weekly ▼	Annual Salary	0.00
Salary Type	Hourly	Use Hours Details	☐

Step 6. Enter '20.00' for the 'Rate per Hour' and set 'Use Hours Detail' to False. The 'Annual Salary' will auto populate



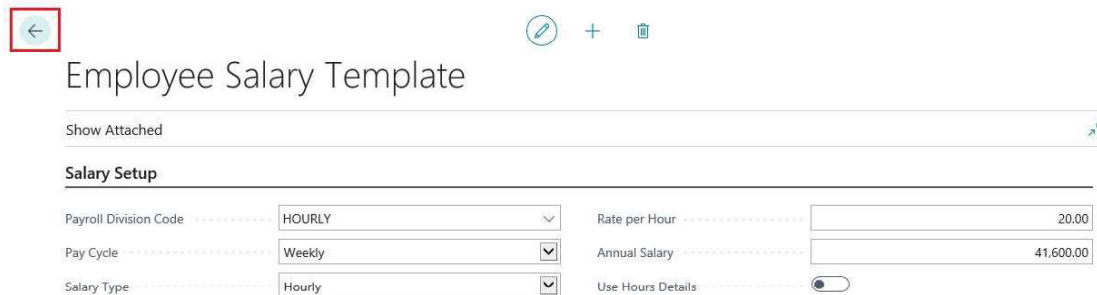
Employee Salary Template

Show Attached

Salary Setup

Payroll Division Code	HOURLY	Rate per Hour	20.00
Pay Cycle	Weekly	Annual Salary	41,600.00
Salary Type	Hourly	Use Hours Details	☐

Step 7. Click 'Back' button to save Employee Salary Template



Employee Salary Template

Show Attached

Salary Setup

Payroll Division Code	HOURLY	Rate per Hour	20.00
Pay Cycle	Weekly	Annual Salary	41,600.00
Salary Type	Hourly	Use Hours Details	☐

Step 8. Repeat this process for the 'Salary' payroll division with the following parameters:

- Pay Cycle 'Weekly'
- Salary Type 'Salary'
- Enter 95,000 in 'Annual Salary'. The Rate per Hour will automatically calculate
- Set 'Use Hours Details' to False

←

+

Employee Salary Template

Show Attached

Salary Setup

Payroll Division Code

SALARY

Rate per Hour

45.67308

Pay Cycle

Weekly

Annual Salary

95,000.00

Salary Type

Salary

Use Hours Details

Step 9. Review both templates in ‘Employee Salary Template List’

←

Employee Salary Template List

Search

+ New

Manage

Show Attached

Open in Excel

	PAYROLL DIVISION CODE	PAY CYCLE	SALARY TYPE	ANNUAL SALARY
☐	ADMIN	Semimonthly	Salary	75,000.00
☐	WAREHOUSE	Weekly	Hourly	24,960.00
☐	WEEKLY	Weekly	Salary	60,000.00
☒	HOURLY	Weekly	Hourly	41,600.00
☒	SALARY	Weekly	Salary	95,000.00