

Additional Setups

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Synopsis:

The 'Additional Setups' provides additional areas to configure Payroll Now to unique customer requirements. This manual will describe the function of these sections and how to use them:

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ACCESS ADDITIONAL SETUPS

- Full Payroll Menu
- 'Setup Groups' Column
- Additional Setups

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	TimeClock Cross-Ref.	
Batch Payroll Processing	Payroll Financial Reports..	Payroll Statistics	ACA Compliance..	Pay Cycles..	Payroll Batch Filters	
Payroll Applicants	Payroll Employee Info..	Posted Batch List	Web Portal Documents..	Payroll Calc. Formulas	Custom Deduct. Limits	holdings / Actions
Payroll Journal	HR Reports..	PTO Ledger Entries	Create Emp. Info. from Template..	Earnings Rates	Work Shifts	Employer Taxes
PTO Management..	Field Select. Reports..	Hours Detail Entries	Time Transfer Reports..	Payroll Tax Setup	Mandatory Fields	Employer Contributions
Enter Hours / Quantity..	Time / PTO Reports..	Approved PTO Hours	Labor Cost Updates..	Customer Payroll Tax Setup	Calendars	Reimbursements
Emp. Change Req./Approve..	Labor Costing Information..	Other Ledgers..	Automatic Data Migration..	State Tax IDs	Workers Comp. Codes	Reimbursements
					Payroll Locations	Reimbursements
					Reason Codes	Reimbursements
					Event Codes	Reimbursements
					Prevailing Wage	Reimbursements
					Arrears Limits	
					Payroll Companies List	
					Deduct. Spouse/Dep.	
					Union Deduction	

TIMECLOCKCROSS-RE

The Time Clock Cross Reference allows you to setup the columns and employees to cross reference the time clock. In the following example, you can cross reference a Payroll Now employee number with the employee's timeclock number.

- From the 'Employee Timeclock Cross Reference Screen' you can select a Type of 'Employee No.'

← EMPLOYEE TIMECLOCK CROSS-REFERENCE | WORK DATE: 10/10/2019

Search + New Edit List Delete Open in Excel

Type ▼	Code ↑	Employee Cross-Ref. Number	First Name	Last Name	Excel Column Letter
→ Employee		0			
Earnings Code					
Employee No.					

- Then select the Earnings code or Employee No.

TYPE ▼	CODE	EMPLOYEE CROSS-REF. NUMBER	FIRSTNAME	LASTNAME	EXCEL COLUMN LETTER
Employee No.	EMP10007	0			

NO.	FIRSTNAME	LASTNAME
EMP10007	Ron	Swanson
EMP10008	Leslie	Knape
EMP10009	Chris	Traeger
EMP10010	April	Ludgate
EMP10011	Ann	Perkins

+ New Select from full list

- Then enter an 'Employee Cross - Ref Number'

Employee TimeClock Cross-Reference

Search + New Edit List Delete Show Attached Open in Excel

TYPE ▼	CODE	EMPLOYEE CROSS-REF. NUMBER	FIRSTNAME	LASTNAME	EXCEL COLUMN LETTER
Employee No.	EMP10007	12546			

PAYROLL BATCH FILTERS

This is where you can put in a user ID and the filters that are supposed to be run on every batch that the user runs. An example of when this feature is used is with Unions. If a company works with multiple unions but certain employees are only supposed to run payroll for 1 of those unions, they can simply enter the user id and union code and the generated batch will only run on the union associated with that user id

← PAYROLL BATCH DEFAULT FILTERS | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

User ID ↑	Batch Description	Salary Type	Pay Cycle	Position Code Filter	Position Category Filter
→ TEST					

User ID ↑

→ TEST

+ New Select from full list

← PAYROLL BATCH DEFAULT FILTERS | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

User ID ↑	Position Department Filter	Union Filter	Company Filter
→ TEST		'UNION A'	

CUSTOM DEDUCTION LIMITS

This is where you can put in a starting date and ending date and a deduction limit. These do need to be linked into a process procedure to work. All deduction limits default to a calendar year, so this is a way to change the date range of the custom deduction limits.

← CUSTOM DEDUCTION LIMITS | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Starting Date ↑	Ending Date	Deduction Limit	Employer Contribution Limit
→ 401KPLAN	6/30/2019	6/30/2020	5,000.00	5,000.00

WORK SHIFTS

Setup work shifts and if there is a premium, you can exclude certain earnings codes to the shift premium.

Start by

- Entering Work Shift Code
- Enter a Description
- Enter a Shift Premium
- Check off appropriate box if you wish to include all Earnings Codes or Exclude Earnings Codes

← PAYROLL WORK SHIFTS | WORK DATE: 10/10/2019 ✓ SAVED  

 Search + New ✎ Edit List 🗑 Delete 📄 Open in Excel  

Code ↑	Description	Shift Premium	Apply to All Earnings	Excl... Earn... Cod...	Earnings Filter
→ NIGHT1	Night Shift 1	3.50	☐	☒	...
			☐	☐	

- If you 'Exclude Earnings Codes' you can then click the 'Earnings Filter' field and select which earnings you wish to exclude
- Click 'Edit List' at top of 'Payroll Codes' pop up screen and then check off what earnings codes you would like to exclude, then click 'Ok'

 Search + New ✎ Edit List 🗑 Delete 📄 Open in Excel

PAYROLL CODES 

Type ▼	Code	Description	Blocked ↑ ▼
→ Earnings	HOLIDAY	Holiday	☒
Earnings	OTHER	Other	☐
Earnings	OVERTIME	Overtime	☐
Earnings	PERSONAL DAY	Personal Day	☐
Earnings	PIECE RATE 2	Piece Rate 2	☐
Earnings	PIECE RATE1	Piece Rate 1	☐
Earnings	REGULAR	Regular	☐
Earnings	SICK PAY	Sick Pay	☐
Earnings	VACATION PAY	Vacation Pay	☐
			☐

OK Cancel

- You can then determine if you wish to apply OT or Double OT multipliers and then click 'Back when you are finished

← PAYROLL WORK SHIFTS | WORK DATE: 10/10/2019 ✓ SAVED

Search + New Edit List Delete Open in Excel

Code ↑	Shift Premium	Apply to All Earnings	Excl... Earn... Cod...	Earnings Filter	Ove... Time Mul... Apply
→ NIGHT1	3.50	☐	☒	HOLIDAY	☐
		☐	☐		☐

MANDATORY FIELDS

The 'Mandatory Fields' does just that. It allows you to determine what fields are mandatory for entering data. From here you will select a 'Table' then the 'Field No' and then check off the 'Mandatory' box to require that data be entered into that field

With regards to Social Security, you must select the 'Social Security Key' field name to make it mandatory that Social Security Numbers are entered in the employee card.

← PAYROLL MANDATORY FIELDS | WORK DATE: 10/10/2019 ✓ SAVED

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Table ↑	Field No. ↑	Field Name	Mandatory
→ Payroll Employee	183	Social Security Key	☒
			☐

CALENDARS

This section allows you to put in holidays and then do special things on those holidays. It will automatically bring in the holiday on the payroll document etc.

- To drill down into the 'Calendar' settings, you may need to click 'More Options' to view the 'Navigate' page action:

← PAYROLL CALENDAR LIST | WORK DATE: 10/10/2019

Search + New Edit List Delete Open in Excel **More options**

Code ↑	Name
→ PAYROLL	Default Payroll Calendar

- Then click 'Navigate' > Base Calendar> Edit Calendar

← PAYROLL CALENDAR LIST | WORK DATE: 10/10/2019

Search + New Edit List Delete Open in Excel **Navigate** Fewer options

Base Calendar ▾

Edit Calendar

Code ↑	Name
→ PAYROLL	Default Payroll Calendar

- Then you can determine 'Special Days' or 'Weekly Recurring' days and then determine the 'Date' and / or 'Day' along with if these dates are classified as 'Nonworking' and how many Nonworking Hours

← PAYROLL · DEFAULT PAYROLL CALENDAR | WORK DATE: 10/10/2019

Payroll Calendar Dates

Search + New Edit List Delete Open in Excel

Recurring System ↑	Date ↑	Day ↑	Description	Nonwor...	Nonworking Hours
→ Special Day ▾				☒	0.00
Special Day				☐	
Weekly Recurring					

WORKERS COMP CODES

This section allows you to set up your workers comp codes. From here you will

- Enter or Select a Workers Comp Code
- Select the State it will apply
- Select a Starting Date
- Enter the Employer Rate (ER)
- Enter an Employee Rate (EE) if applicable

← WORKERS COMP. CODE SETUP | WORK DATE: 10/10/2019 ✓ SAVED

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Workers Comp. Code ↑	State ↑	Starting Date ↑	Percentage / Rate ER	Percentage / Rate EE	Description
→ AZ WORKCOMP	AZ	5/15/2020	1.50	0.00	

PAYROLL LOCATIONS

From here you can create your Payroll Location Codes. Simply open the table and then enter a 'Code' and a 'Description'. Then click 'Back' to save.

← PAYROLL LOCATIONS | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description
→ DALLAS2	1215 Sycamore Creek Location

REASON CODES

From here you can create 'Reason Codes' for 'Termination Reasons' in the employee card. Simply enter a 'Code' and a 'Description'

← PAYROLL REASON CODES | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description
→ FAILED DRUG TEST	Failed Drug Test Screening

EVENT CODES

Event Codes can be used in a process procedure to trigger custom events. Create the codes here and then utilize them as needed in the 'Process Procedures' section. Enter a desired 'Code' then enter a description

← PAYROLL EVENT CODES | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Description	Filter
→ EV 1	State Disability Event 1	

PREVAILING WAGE

Setup prevailing wage codes and a minimum hourly rate and you can check off that benefits should be included in that rate. This also means that when it analyzes the employees rate it calculates in the benefits before it checks to see if they are above the threshold of the prevailing wage.

← PREVAILING WAGES | WORK DATE: 10/10/2019 ✓ SAVED

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Code ↑	Starting Date ↑	Description	Hourly Rate	Fringe Benefits Included In Rate
→ CA PREV	2/15/2020	California prevailing wage	9.50	☒

Arrears Limits

This is where you can say 'if this employee doesn't have enough earnings for the deduction, go ahead and take the deduction and put it in arrears but then we have limits'. So by setting a limit the system will stop putting it in arrears at that point.

Select an employee number, then select a deduction code and then add the limit.

← ARREARS TRACKING LIMITS | WORK DATE: 10/10/2019

Search + New Edit List Delete Open in Excel

Employee No.	Deduction Code ↑	Limit
TEST-EMP-AL	401KPLAN	2,500.00
→		0.00

PAYROLL COMPANIES LIST

If you have multiple payroll companies in Business Central, they will show up here.

DEDUCTION SPOUSE / DEPENDENT SETUP

Whenever you link to the 'spouse dependent table' this is where the system is looking. And here the system is looking at the deduction code, if they have a spouse, if they have dependents and then employee deduction amounts and employer contribution amounts:

- you can do health insurance, spouse dependent 1 and this is available

← DEDUCTION SPOUSE/DEPENDENT SETUP | WORK DATE: 10/10/2019 ✓ SAVED

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Deduction Code ↑	Spouse ↑	Dependents ↑	Employee Deduction Amount	Employer Contribution Amount
→ HEALTH INSURANCE		1	150	0.00

UNION DEDUCTION

This is linked to the 'drop down' in the deduction card. If you have unions that require that deductions are based on an hourly rate range, this is where you can set that up.

←

PAYROLL UNION DEDUCTIONS | WORK DATE: 10/10/2019

✓ SAVED

🔍 Search

+ New

Edit List

Delete

📄 Open in Excel

Union Code ↑		Minimum Hourly Rate ↑	Maximum Hourly Rate ↑	Deduction per Hour
→ UNION A	⋮	10.00	15.00	0.60
UNION A		15.01	20.00	0.80