

Employees and Payroll Management Window - Screenshot

The Employees and Payroll Management window can be used to add/edit employees AND to navigate to various payroll features available in the program. To open this window, click the “Payroll Mgt” button on the Navigation/Home window. The next few pages in this help document will describe the features on this window.

Employee Lists | Payroll Setup ▾ | Current Payroll ▾ | Checks ▾ | Payroll Forms and Reports ▾ | Filter Records ▾ | Remove Filter/Sort ▾

Employees and Payroll Management (See toolbar above.)

Home

Find Employee Code-> KINGTAMARA - Tamara King ▾

Find Name-> Tamara King - KINGTAMARA ▾

	Select Task (Try F4 key)	Employee Code	Add New Employee	A-Active I-Inactive	Home Phone	Mobile Phone	Hired	Terminated	Birthday
	Select Task ▾	FRANCISJ	Francis Jones	A	(666) 666-6666		01-Jan-02		Jun 2
▶	Select Task ▾	KINGTAMARA	Tamara King	I	(222) 222-2222		10-Aug-06		Jun 2
	Select Task ▾	SMITHAPR	April Smith	A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

Fantastic Builders, Inc.

Record: ⏪ ⏩ 2 ▶ ▶▶ ▶* of 3

Opening the Employees and Payroll Management Window

To open the Employees and Payroll Management window, click the Payroll Management Window link on the Navigation/Home window. OR, just type PM into the Index text box and press the Enter key on your keyboard.



The screenshot shows a web application interface. At the top, there is a search bar labeled "Index->" containing the text "PM - Payroll Management". Below this is a menu titled "Management Windows". The menu items are listed as follows:

- ACCOUNTING Management Window (AC)**
Chart of Accounts, Financials, Trial Balance, Transactions, Journal Entries
- COST CODES Management Window (CC)**
Cost Codes, Master Pricing, General Matls and Labor Check Lists
- JOBS Management Window (JO)**
Jobs and Job Lists
- VENDORS and PAYABLES Management Window (AP)**
Vendors, Lists, Payables Transactions, 1099's, Waivers, Insurance Audits
- CUSTOMERS / PAYORS and RECEIVABLES Mgt Window (AR)**
Payors or Customers, Lists, Receivables Transactions, Invoices, Statements
- BANKING Management Window (BA)**
Bank Account Balances, Reconciliations, Bank Ledgers, Deposits, Checks
- PAYROLL Management Window (PM)**
Employees, Lists, Payroll Processing, W2s, 941, Unemp., Other PR Reports
- CONTACTS, Labels, Letters, Etc. Management Window (CN)**
Contacts, Lists, Labels, Letters, Postcards, and Activity Reports
- DOCUMENTS (DOX)**
Tag or View Stored PDF Documents
- UTILITIES (UT)**
View Database, View Audit Table, Move Records, Etc.

The "PAYROLL Management Window (PM)" option is highlighted with a red rectangular box.

Find an Employee on the Employee Management Window

To Find an employee by the Employee Code, start typing the Employee Code into the 'Find Employee Code' text box. Employee Codes that match will auto fill into the field as you type. When the Employee Code is found in the drop down list, just press the Enter key on your keyboard.

OR, use the 'drop down' button to scroll through a list of employees. Click on the desired employee.

Tip! Your F4 key will trigger a drop down list.

Employees and Payroll Management (See toolbar above.)

Find Employee Code-> FRANCISJ - Francis Jones

Find Name-> FRANCISJ - Francis Jones
KINGTAMARA - Tamara King
SMITHAPR - April Smith

Select Task (Try F4 key) | Employee Code | Add New Employee | In-Active | Home Phone | Mobile Phone | Hired | Terminated | Birthday

Select Task (Try F4 key)	Employee Code	Name	In-Active	Home Phone	Mobile Phone	Hired	Terminated	Birthday
Select Task	FRANCISJ	Francis Jones	A	(666) 666-6666		01-Jan-02		Jun 2
Select Task	KINGTAMARA	Tamara King	I	(222) 222-2222		10-Aug-06		Jun 2
Select Task	SMITHAPR	April Smith	A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

To Find an employee by the employee's name, start typing the first name of the employee into the 'Find Name' text box. Employee names that match what you are typing will auto fill into the field as you type. When the desired name is filled in, just press the Enter key on your keyboard.

OR, use the 'drop down' button to scroll through a list of employee names. Click on the desired employee.

Employees and Payroll Management (See toolbar above.)

Find Employee Code-> FRANCISJ - Francis Jones

Find Name-> Francis Jones - FRANCISJ

Select Task (Try F4 key) | Employee Code | Add New Employee | In-Active | Home Phone | Mobile Phone | Hired | Terminated | Birthday

Select Task (Try F4 key)	Employee Code	Name	In-Active	Home Phone	Mobile Phone	Hired	Terminated	Birthday
Select Task	FRANCISJ	Francis Jones	A	(666) 666-6666		01-Jan-02		Jun 2
Select Task	KINGTAMARA	Tamara King	I	(222) 222-2222		10-Aug-06		Jun 2
Select Task	SMITHAPR	April Smith	A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

Select Task for One Employee

To the left of every employee in the Employees list, there is a 'Select Task' field. Use the drop down button to see tasks related to the employee. Then click on the desired task. Tasks related to employees on the Employees Management window are briefly described below.

Select Task (Try F4 key)	Employee Code		A-Active I-Inactive
▶ Select Task	FRANCISJ	Francis Jones	A
Activities/Notes For This Employee			I
Delete Employee			A
Documents			
Edit Employee			
List of Checks			
Transactions			

Tip! Use the F4 key on your keyboard to trigger the drop down list for 'Select Task'.

Activities/Notes For This Employee - Opens the Activities/Notes window. The Activities window will open displaying all activities/notes related to the employee. See help documents for using the Activities/Notes features on that window.

Delete Employee - Pops up a window to verify that you want to delete the employee. Use the information on that window and in Help documents about deleting an employee.

Documents - Opens the Documents File Cabinet to be used for viewing stored PDF documents. See Help instructions about 'Documents' storage and retrieval.

Edit Employee - Opens the setup window for the employee. Use that window to edit information about the employee. The same employee setup window can be opened by double clicking on the employee code or on the employee name on the Employees and Payroll Management window.

List of Checks - Opens a window that displays a list of checks posted to the selected employee. That window can be used to drill down to the detail behind the checks. See Help documents on that window.

Transactions - Pops up a message about where to find transactions reports for an employee.

Using 'Double Click' to Edit Employee

"Double Click" - Hold your cursor over desired Employee Code, or any other field in the line, then quickly click your mouse button twice.

Double click on an Employee Code, Name, or other fields to open the window to Edit that employee.

Employees and Payroll Management (See toolbar above.)

Find Employee Code > KINGTAMARA - Tamara King
Find Name > Tamara King - KINGTAMARA

Select Task (Try F4 key)	Employee Code	Add New Employee	A-Active I-Inactive	Home Phone	Mobile Phone	Hired	Terminated	Birthday
Select Task	FRANCISJ		A	(666) 666-6666		01-Jan-02		Jun 2
Select Task	KINGTAMARA		I	(222) 222-2222		10-Aug-06		Jun 2
Select Task	SMITHAPR		A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

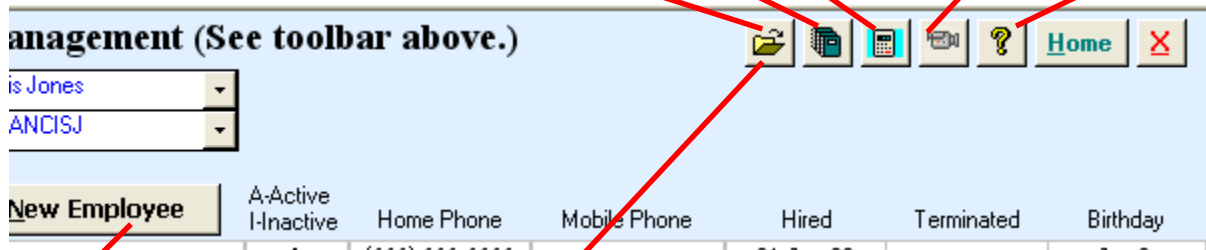
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Record: 2 of 3

Tip! You can use the 'Navigation' buttons at the bottom of the window to move from record to record!

Buttons on the Window / Save to Excel or Word

*Send Data To Excel, Word, etc. (explained below) Stored Documents Pop Up Calculator Tutorial Movie Info Help Documents

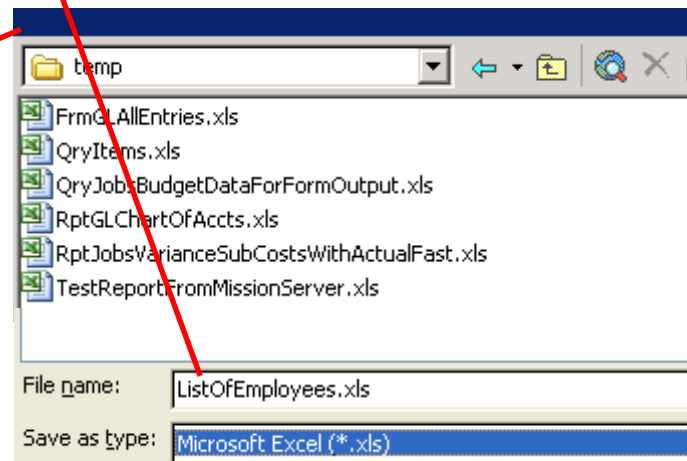
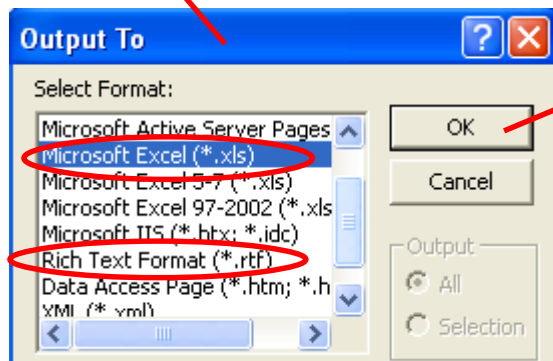


The 'Add New Employee' button is explained in the Help document for setting up an employee.

***Send Data to Excel, Word, etc.** - Use the button that looks like an open folder to save the data displayed on the window as an Excel or Word file. To save as an Excel file, select one of formats that end in .xls. To save as a Word file, use the Rich Text Format (*.rtf).

After selecting a folder to save the file to, type in an appropriate name for the file. Then click the OK button.

The file will save to the selected folder and you can use it with the appropriate Excel or Word program.



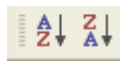
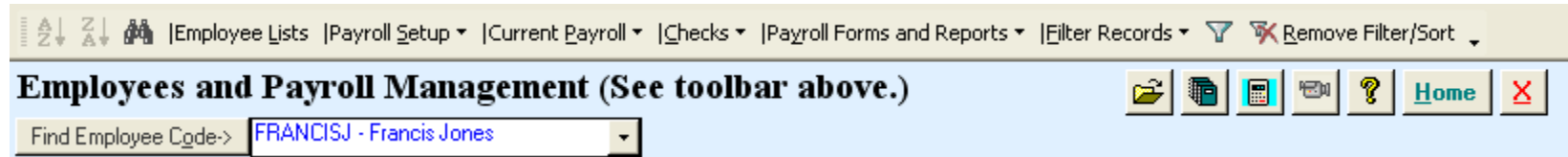
NOTE TO REMOTE USERS:

IF you save a file to 'My Documents' on the Remote Server, you will not be able to open it until it is downloaded to your own computer. Please follow the instructions in the 'Remote User Guide' about downloading files from the server to your own computer.

IF you navigate to your own computer to save the file, then downloading as mentioned above will not be necessary. HOWEVER, it CAN be faster to quickly save to My Documents on the server and then download later. This will avoid waiting for the program to calculate AND download at the same time.

Toolbar on Employees and Payroll Management Window

See Brief Toolbar Descriptions below. For **Quick Selection** of a button on a toolbar, try holding down the Alt key on your keyboard and pressing the underlined letter shown on the button. If there is a drop down of selections associated with the button, just press the underlined letter for your selection on your keyboard.



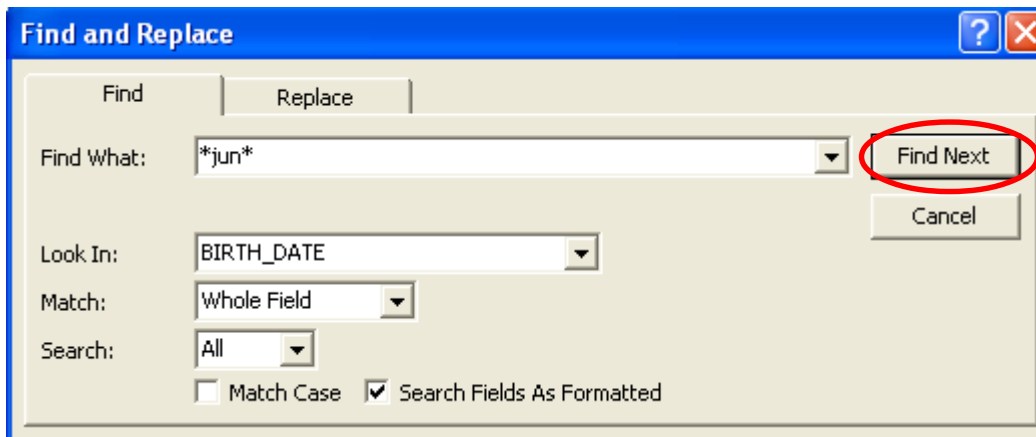
A-Z Sort - Sort records shown on the window in ascending order (A to Z, 1 to whatever, etc.). First decide which column should be used for the sort. Then click on anything in that column. Then use the sort button on the toolbar.

Z-A Sort - Sort records shown on the window in descending order (Z to A, whatever to 1, etc.). First decide which column should be used for the sort. Then click on anything in that column. Then use the sort button on the toolbar.



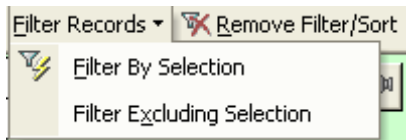
Binoculars (Find) - Use binoculars to find data within a column. First click in the column you want to search. Then click the binoculars. Type in what you are searching for. Then click the 'Find Next' button. If a match was found, it will be highlighted on the list of records. Click the Cancel button when you are finished searching.

Example: Click on any birthday in the employees list. Then click the binoculars on the toolbar. To find records that have the word *jun* in the birthday, use asterisks on either side of the word.



Continue to next page for more toolbar information.

Filtering Records



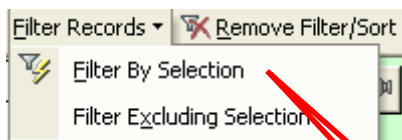
Filter Records->Filter By Selection - Use this button to filter and display only records with the same data that is in the field where the cursor is on the screen. The number of filtered records will be displayed on the bottom left of the screen with the word “Filtered” in parenthesis. To remove the filter and display all records, click the “**Remove Filter/Sort**” toggle button on the Toolbar.

Filter Records->Filter Excluding Selection - Use this button to filter and display only records that do NOT have same data that is in the field where the cursor is on the screen. The number of filtered records will be displayed on the bottom left of the screen with the word “Filtered” in parenthesis. To remove the filter and display all records, click the “**Remove Filter/Sort**” toggle button on the Toolbar.

EXAMPLE: Step 1 - To display only active employees, click on the letter ‘A’ in the ‘Active/Inactive’ column.

Employee Code	Add New Employee	A-Active I-Inactive	Home Phone	Mobile Phone	Hired	Terminated	Birthday
FRANCISJ	Francis Jones	A	(666) 666-6666		01-Jan-02		Jun 2
KINGTAMARA	Tamara King	I	(222) 222-2222		10-Aug-06		Jun 2
SMITHAPR	April Smith	A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

Step 2 - Click Filter Records, Then Filter by Selection



After clicking ‘**Filter By Selection**’, only the employees with an A for Active are displayed. Notice bottom of window shows that there are 2 “filtered” records. To return all employees to the window, use the ‘**Remove Filter/Sort**’ button. This feature can be used on any data in any column.

If you clicked on the A for Active, and selected **Filter Excluding Selection**, only Inactive employees would display.

Employee Code	Add New Employee	A-Active I-Inactive	Home Phone	Mobile Phone	Hired	Terminated	Birthday
FRANCISJ	Francis Jones	A	(666) 666-6666		01-Jan-02		Jun 2
SMITHAPR	April Smith	A	(111) 111-1111	(444) 444-4444	01-Jan-02		Dec 15

1 of 2 (Filtered)

Employee Lists

Employee Lists - Good for Excel Export - Opens window to print employee lists based on selected criteria, OR to send employee data to an Excel spreadsheet. Help documents are available on the window.

REPORTS-> Sorted Lists ▾ Grouped Lists ▾ Go To Employee/Payroll Management ▾

Employee Lists - Criteria and Reports

Use the Toolbar at the top of the window to view CHS Employee List Reports.

View All

EMPLOYEE: FRANCISJ
 DEPARTMENTS: CH
 ACTIVE?: ACTIVE

From: FRANCISJ To: SMITHAPR
 From: CH To: SPEC
 From: ACTIVE To: INACTIVE

Reset
Reset
Reset

NOTE: Labels c for selected Ven Contacts by using Management Rep (CNR in In Navigation/Hor

Save As Excel Spreadsheet

To make changes to the Employee's setup record, Double Click on the Edit Field for an Employee in the list below.

Emp. Code	Edit	Status	First Name	Last Name	Street	City	State	Zip	Dept.	Default GL	Cost C
▶ FRANCISJ	Edit	A	Francis	Jones	33455 Brook Lane	Austin	TX	78735-1234	CH	4010	9010
KINGTAMARA	Edit	I	Tamara	King	1000 Anywhere	Austin	TX	78704-1234	OH	8090	0
SMITHAPR	Edit	A	April	Smith	4000 Riverside	Austin	TX	78704-	OH	8050	0

Other buttons on Employees and Payroll Management toolbar

Use other buttons on the toolbar to navigate to other features in the program. Help instructions for the windows that open will be available on those windows.

Payroll Setup ▾ | Current Payroll ▾ | Checks ▾

- Wage Categories
- Deduction / Addition Categories
- Tax Categories
- Tax Withholding Tables
- Employee Balances Forward

Current Payroll ▾ | Checks ▾ | Payroll Forms and Reports ▾

- Prepare Current Payroll
- Print Current Payroll Checks

Checks ▾ | Payroll Forms and Reports ▾ | Filter Records ▾

- Print Current Payroll Checks
- Lists Of Checks
- Review Past Checks / Edit Work Comp field
- Void Payroll Checks

Payroll Forms and Reports ▾ | Filter Records ▾

- Payroll Reports (including 941 Info and W2's)
- Unemployment Tax Info
- Review Past Payroll / Edit Work Comp field