

CheckMark Payroll Software

Setup Guide

Run 4 payrolls with the Free Trial. www.checkmark.com 800-444-9922

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CheckMark Payroll Quick Start Guide

In this brief overview, we will cover the most common buttons and how to setup your company. For more details, refer to the <u>Payroll</u> <u>Manual</u> under the Help menu. You can also call 800-444-9922 or email info@checkmark.com to get help from technical support.

<u>Setup</u>

Under the File menu, click New Company. You have the option to copy company setup data. Enter a name for your company data files and click OK. After saving, the path to your company data files will appear at the bottom of the Commands screen. Only the Company Information button will be available.

Company Information:

Click Company Information and complete the fields.

Departments:

You can add up to 99 departments. Refer to the <u>Payroll Manual</u> for more details.

Federal Tax Values:

Check that the year showing is the payroll year you are running. Nothing else to do here. Always install the latest version of CheckMark Payroll to be sure your federal tax tables are up to date.

State Tax Values:

Setup is required for all employers even in the states that do not require state withholding. Check the Load Latest Table button. Select all the tables for your state or states. Click OK.

Local Tax Values:

Use this button if you have a local income tax or if you are a California employer. Click Load Latest Tables. All California employers should click Load Latest Table and select "CASDI" to setup SDI.

Hour Categories:

Click Add From List and select Regular Hours and all categories that apply to your company.



Company Information		
Sava .		
Company Name	Bumblobee Cookle Shop	
Trade Name, il any		Use on checks & reports
Address Line 1	123 Main St.	
Address Line 2		
City	Anytown	
State	C0	
Zip	12345	
Phone	800-123-5678	
Federal ID	\$5-55555555	
Password		
Payroll Year	2012	

	Additional Tax Information
Load Latest Table	State Tax Parameters T % of Federal Tax Subtract Fed W/H First Round to Nearest Dollar
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Additional Incomes:

You can create a company menu of up to 20 additional incomes. Each employee can have up to 4 additional incomes in addition to 1 salary and 4 hourly incomes.

Click Add From List for a list of templates that you can customize to fit your needs. You can also create your own by clicking the New button.

There are several calculation methods. To manually enter an amount later while running a payroll, use the Variable Amount calculation.

You have the option of setting the Fixed Amount at 0.00 and entering the exact amount per employee later as you assign incomes to the employees.

Deductions:

In addition to the standard payroll deductions, each employee can have up to 8 customizable deductions, and you can create a company menu of up to 30 deductions.

Click Add From List for a list of templates that you can customize to fit your needs. You can also create your own by clicking the New button.

If you plan to manually enter the amounts when running each payroll, use the Variable Amount calculation.

Employees:

Enter the data for each employee. To learn more about importing an employee data file, please refer to the <u>Payroll Manual</u>.

Enter employee records using the employee tabs. The menus that you built during setup will appear as Company Categories under the Income, Deductions, and Accrued Hours tabs. Assign categories and customize as needed for each employee. The Accrued Hours tab helps you track hour categories such as vacation time and sick time.

The YTD tab shows the year-to-date totals. Before running your first payroll, you can enter your payroll history as of the end of a quarter. Please refer to the <u>Payroll Manual</u> for details.

Add from List	Calculation Method	
Additional Income	C Fixed Amount	per Pay Period •
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	Piecesesk Balu	
	C Omit from Net	
	T Include in Wages I	or Dept/Job Posting
	Eannpt From	Tip Income
	Federal Tas	T Allocated Tip
	T Social Security	🗂 Reported Tip
	T Medicare	
	IT FUTA	W-2 Options
	☐ State Tax	🗁 Box 10 - Dependent Care Benefits
	T SUTA	🗌 🗆 Box 11 - Nonguel, Plan 🗁 Sec. 457
	T Local Tax	T Box 12 - Code
	C Deduction (91)	E Box 3.4 - Other

Man I Man	
111-1211-122-13	Calculation Method
Add from List	C Variable Amount
Deduction	Fixed Amount per Pay Period +
	C Fixed % Apple to Total Wages *
	Limit Type Amount
	Annual Wages
	Englopu Match
	Type Amount/Rate Wage Limit
	None 💌
	T Match & No Engloyee Deduction
	Deduct Before W-2 Options
	🔽 Federal Tas 🛛 🗁 Bux 10 - Dependent Care Benefi
	Social Security Bas 12 - Code
	T Medicare T Box 14 - Other
	FUTA E Box 18-20 - Local Tax
	T State Tax
	IT SUTA
	and a second sec

- Dear	Number of Employees:	Z Johnson.loe Shith.lane
Percentel Wages Toses 1	Income Deductions Accrued Hours 1911	6]
First Name	C Inactive (Delete at New York)	
Last Home	and the Article of Contractor	
Address Line 1		
Address Line 2		
Cay		
State & Zip		
Social Security #	17	
Enal		
Phone Number	Direct Depeak Papebeck	
Birth Date	Direct Depoxit Prenet	
Employee #	Housing #1 Overking	• ===
None	Accept II	
1 600	Routing #2 Direction	· 二
	Account #2	

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Calculating a Payroll

Now that you have completed the company setup, you can quickly run a payroll.

<u>Enter Hours:</u> All employees will appear on the left. The categories you selected under Hour Categories during the setup will appear along the top. Hourly employees are noted with a >. Enter the employee hours for the different categories and click Save.

Calculate Pay:

You can Calculate All, or calculate one employee by highlighting that employee and clicking Save. Employees listed in green are calculated and ready for the next step. If you want to re-calculate, highlight that employee and click Undo. You can create a paycheck for one employee by using Create Check. Or go to the next step to create payroll checks.

Review/Create Paychecks:

Only the employees who appear in the window will receive a paycheck. If there is a problem, return to Calculate Pay and make the necessary changes. To complete the payroll, enter the Next Check # and click Create.

Print Paychecks:

You can print checks as often as you like, so feel free to run a test on plain paper. You can use preprinted checks or MICR encode blank check paper.

Use the Default setting or select Top, Middle, or Bottom Check to format your check paper. Click Edit to reposition print fields or suppress certain print fields for the custom formats. With the Edit window open, the fields with red letters <u>will not print</u>. Doubleclick a field to switch printing on or off. To reposition a field, highlight the field and drag.

Printing MICR encoding requires a laser printer. Complete the bank information fields and check Print MICR to turn it on or uncheck to turn it off.

In addition to printing paychecks, you can also set up Direct Deposit. See manual for details.

Modify Paychecks:

If a paycheck is incorrect, you can Modify a field, Void a check, or Delete a paycheck entirely.



	Lift House	Calculate All	Lietneen, ine
	Edit Income	See	S5mth_late
	Import Income	Undo	
	Disable Calculation	Create Charts	
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Nez Brez	Check Dates	Eaul Options Send Without Prompt Include Non Direct Deposit
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	HICR Encoding Bank B Company Av Bank Bank	s Iouting B Print MICR count B ek Name Adhess

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