

Running the Payroll Setup Wizard

Available in Sage 50 Pro Accounting and higher

Quick Reference Guide

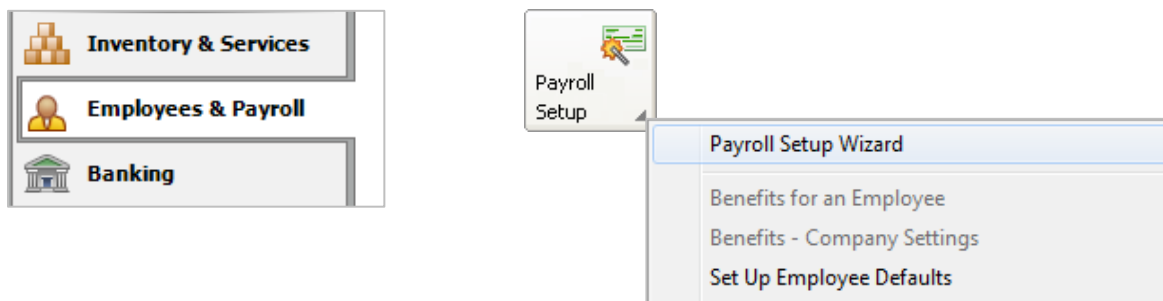


What is the Payroll Setup Wizard?

It is a tool that walks you through setting up most of your payroll information. For example, it helps you set up benefits (such as retirement plans and medical plans). It also assists you with setting up your taxes (such as state unemployment insurance and local taxes).

How do I access the Payroll Setup Wizard?

Go to the **Employees & Payroll Navigation Center**, and select the Payroll Setup button, and click Payroll Setup Wizard.

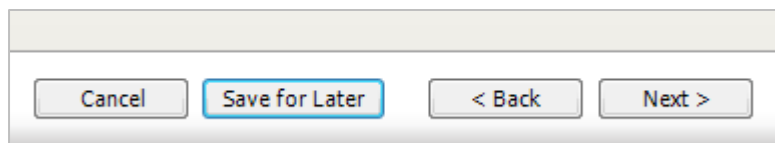


What kind of information does the wizard help me set up?

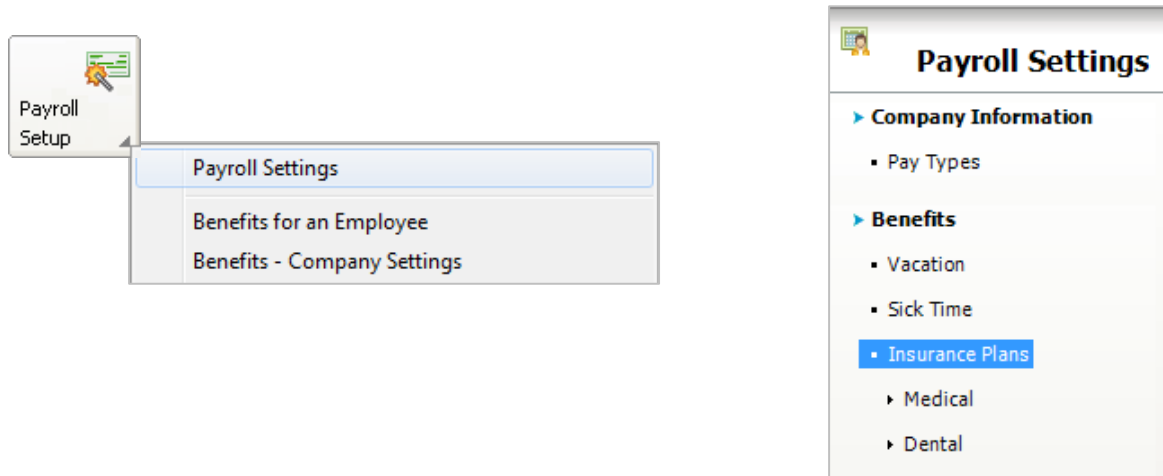
- State unemployment percentage and limit
- Employee tips and meals
- Vacation and sick time
- Retirement plans (401K, IRA, etc), insurance plans (medical, dental), and flexible spending accounts
- Taxable and non-taxable (pretax) deductions
- Common federal and state payroll fields for employee-paid and company-paid taxes
- General ledger accounts for payroll fields

Do I have to set up my payroll all at once?

No, if you need to return to the Payroll Setup Wizard at a later time, click **Save for Later**.

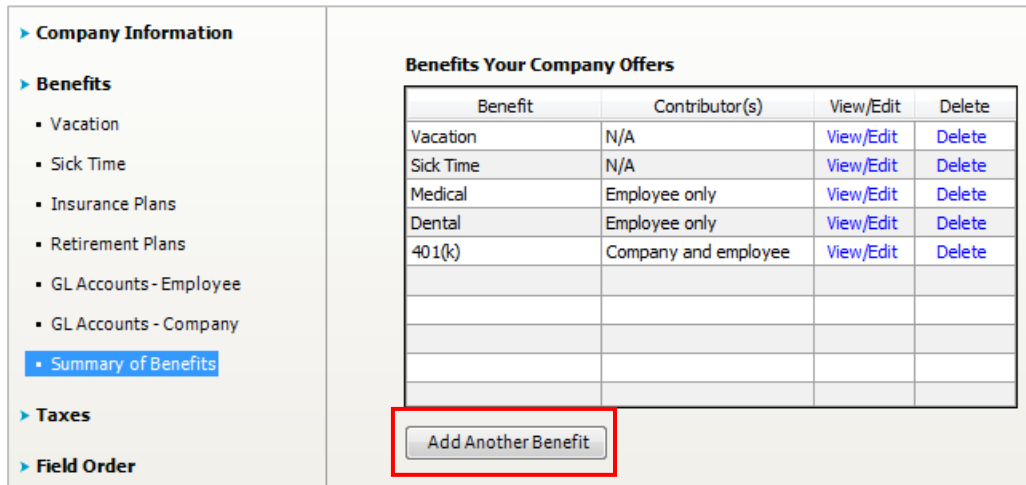


After you have completed the setup process and return to the wizard, you will notice it is now called **Payroll Settings**. You can edit or modify information you entered from the initial setup process. Use the options on the left side of the window to get to the payroll setting you need.



Did you know?

- You can quickly add new benefits at any time. On the left side of the Payroll Settings window, select **Summary of Benefits** and click **Add Another Benefit**. From this window, you can also view, edit, or delete existing benefits.



- You can change the way payroll fields are listed on printed paychecks and the Payroll Entry window. Click **Field Order** on the left side of the Payroll Settings window, and select the field you want to move up or down.

