

## Creating Manual Checks

There are three methods for creating manual checks:

- Using the Create Manual Check button
- Using the Payroll Expert Wizard
- Creating Multiple Manual Checks

### Using the Create Manual Check button

A company payroll must be selected before getting started

1. Go to the [Payroll - Check screen](#)
2. Click the **General** tab
3. Click the **Create Manual Check** button

**Result:** The Create Manual Check dialog box opens

Field / Button	
Check Type	select Manual
Check Number	enter a number for the check. If left blank, the system v

4. Click **OK**.

**Result:** the check is displayed.

At the bottom of the Batch screen, enter applicable information for the check.

5. Select the **Select EEs from List** checkbox

6. Select Manual in the **Create Checks** field
7. Make sure the **Calculate Scheduled E/Ds** box is selected
8. Click **OK**
9. Select the employee(s) for whom to create manual checks (press the **CTRL** key to select more than one)
10. Click **OK**
11. On the **Check Lines** tab, enter the values for all checks
12. Click **Save**.

## Using the Payroll Expert Wizard

1. Go to the [Payroll - Payroll screen](#).
2. Select and open the company.
3. Click the **plus sign** to create a new record.
4. Click the **New Payroll Expert** button.

The screenshot shows the Payroll Expert Wizard interface. At the top, there is a 'Summary' section with a table containing columns for 'Batch', 'Period Begin Date', 'Period End Date', and 'Frequency'. Below this are three main sections: 'Batch Detail', 'Controls', and 'Batch Creation Options'. The 'Batch Detail' section includes fields for 'Payroll Filter', 'Payroll Check Template', 'Frequency', 'Period Begin Date', and 'Period End Date', along with radio buttons for 'Pay Salary', 'Pay Standard Hours', and 'Load Payroll Defaults'. The 'Controls' section contains buttons for 'Create Batch', 'Pre-Process Batch', 'Refresh ED', 'Refresh ED No Man', and 'Delete Batch'. The 'Batch Creation Options' section has checkboxes for 'Calculate Scheduled EDs', 'Select EEs from List', 'Create 945 Checks', and 'Include Time Off Requests', along with a 'Checks per EE' dropdown and radio buttons for 'Pay' (All, Salary, Hourly) and 'Create Checks' (Regular, Manual, 3rd Party).

The Wizard prompts the user through a series of screens to

- a. Enter check comments
- b. Select the payroll type
- c. Verify/change the scheduled check date
- d. Ask whether to block all agencies
- e. Ask whether to block all ACH transactions
- f. Ask whether to block billing
- g. Ask whether to block tax deposits
- h. Ask whether to block checks / reports
- i. Ask whether to block Time off Accrual

- j. Select payroll frequency
- k. Enter the period begin date and end date
  - l. Ask whether to load payroll defaults
- m. Select a default check template
- n. Select a payroll filter
- o. Ask whether to auto-create checks for the batch
- p. Ask whether to auto-create quarter-to-date checks

Based upon the answers, the Wizard creates the batch.

- 5. Click the **Quick Entry** tab or the **Quick Entry w/Overrides** tab to enter additional or override information.