Creating a Payroll

The three most common ways to create a payroll in Evolution are:

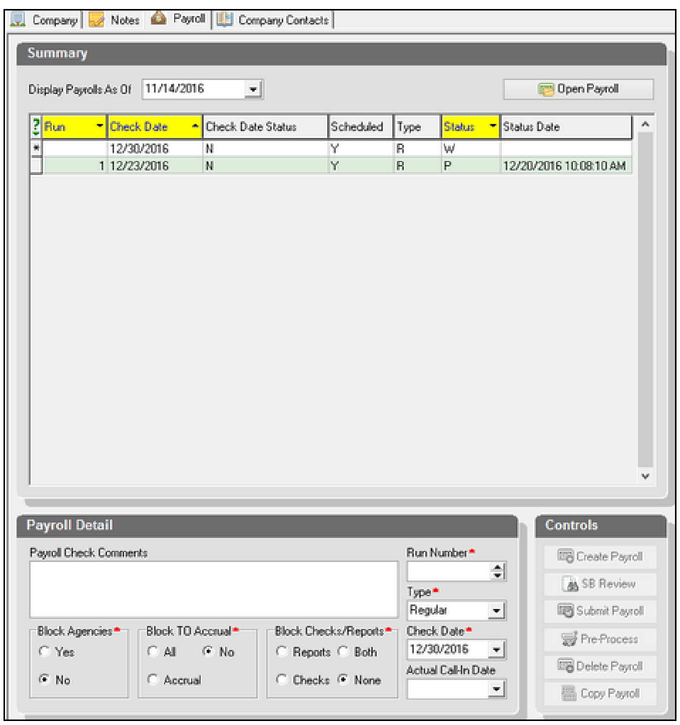
- Using the **Plus Sign** in the toolbar
- Using the **Create Payroll** button
- Using the **Payroll Expert [Wizard]**

Using the Plus Sign

Using the **plus sign** in the toolbar is the preferred way to create a new record for anything, in Evolution.

1. Go to the Payroll - Payroll screen.
2. Select and open the company, which brings the user to the Notes tab.
3. Enter any notes that the payroll processor should see prior to processing the payroll.
4. Click the **Payroll** tab.
5. Click the **plus**  **sign** in the toolbar to create a new record.

A new line is created at the top of the grid for the new payroll / batch.



The check date defaults to the next scheduled check listed in the Company Calendar.

6. Complete the additional information about the payroll (Run Number is automatically entered when changes are posted).
7. Click the **Save** button in the toolbar to post changes.

Result: the Payroll - Batch screen opens to the Batch tab, where the checks are created.

Using the Create Payroll Button

Rather than clicking the **plus sign** in the toolbar to create a new record,

1. Go to the Payroll - Payroll screen.
2. Select and open the company
3. Click the **Payroll** tab.
4. Click the **Create Payroll** button.

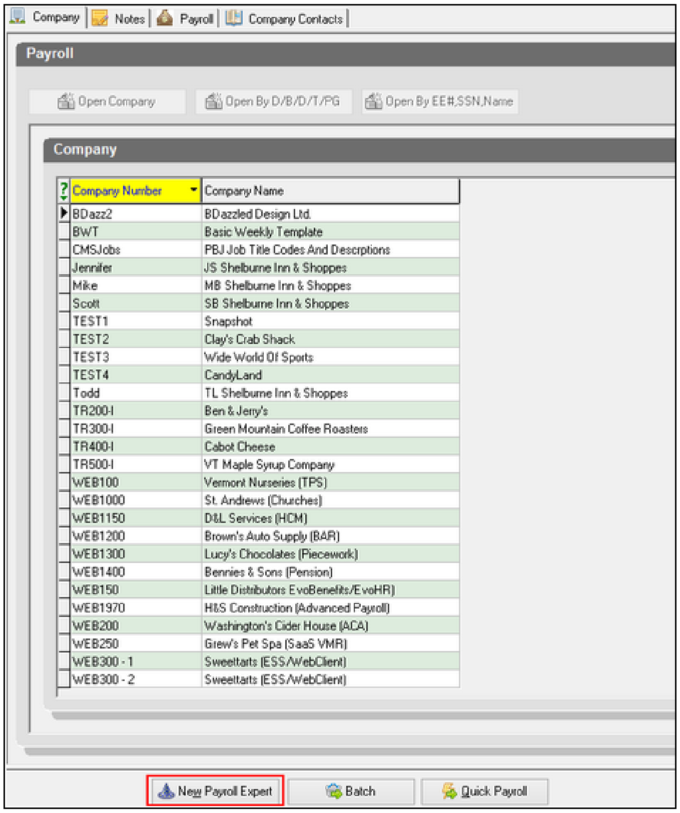
Result: A new line is created at the top of the grid for the new payroll / batch.

5. Follow steps 6 and 7 above.

Using the Payroll Expert Wizard

Evolution offers a Wizard called the Payroll Expert to help create payrolls.

1. Go to the Payroll - Payroll screen.
2. Select and open the company.
3. Click the **New Payroll Expert** button



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.

4. To enter additional or override information, click the **Quick Entry tab** or the **Quick Entry w/Overrides tab**.