



EASY. ONLINE. SECURE.

# HOW TO RUN YOUR FIRST PAYROLL

**READY TO GET STARTED?**

This user guide will walk you through the process of running your first payroll and get you familiar with our platform.

**Simplified  
Payroll & Bookkeeping** 

Email: [info@SimplifiedPB.com](mailto:info@SimplifiedPB.com)  
Tel: [737-931-1413](tel:737-931-1413)

## LET'S GET STARTED

- ✓ Visit Simplified Payroll and Bookkeeping and select "Login" in the navigation bar on the top, right side of the screen.
- ✓ Enter your **username** and **password** under the Payroll Administration Login.

## GETTING TO KNOW THE DASHBOARD

After logging in, you will be brought to your **Dashboard**. This is where you will start your payroll each time.

- 1** To get started, click the **Begin Payroll** button

The screenshot shows the dashboard interface. At the top, there is a navigation bar with 'Dashboard', 'Payroll', 'Reports', 'Employees', 'Company', and 'Resources'. A search bar and 'Help' link are on the right. The user is logged in as 'ANA'. The main content area is titled 'ACME ALARMS' and contains three panels: 'CURRENT PAYROLL', 'OFF-CYCLE ACTIVITIES', and 'REMINDERS'. The 'CURRENT PAYROLL' panel shows the current pay period from Fri May 31 to Wed Jul 31, with a 'Begin Payroll' button highlighted with a blue circle and the number '1'. The 'OFF-CYCLE ACTIVITIES' panel lists actions like 'Pay a Bonus / Commission', 'Pay an Additional Check', 'Extra Payroll', and 'Void a Check / Payroll'. The 'REMINDERS' panel shows upcoming payroll dates for July and August. Below these panels, there are two more sections: 'RECENT PAYROLLS' and 'PAYROLL ANALYTICS'. The 'RECENT PAYROLLS' section shows a payroll approved on Wed May 29, 2019, with a total expense of \$4,076.16. The 'PAYROLL ANALYTICS' section shows a bar chart of 'TOTAL PAYROLL EXPENSES' from APR 12 to MAY 31, with a total of \$4,076.16 for May 31, 2019. Below the chart, there are three summary boxes: 'EMPLOYEE PAY \$2,975.76', 'DEDUCTIONS \$0.00', and 'TAXES \$1,100.40'.

Note: The lower half of the screen shows relevant payroll information pertaining both to recently run payrolls on our platform and key financial analytics. Click into these for a detailed breakdown.

## ENTER PAYROLL SCREEN

After clicking into **Begin Payroll** from the **Dashboard**, you will be taken to the **Enter Payroll** screen. Here you will find your employees grouped by the following pay types: Hourly, Salaried and 1099 Contractors. For Hourly Employees and Contractors, you will enter hours for each employee. Salaried Employees' hours are auto-filled. You can enter any additional compensation, such as bonus, tips, or commission income, the employee may have earned during the pay period.

Note: Before you begin this section, ensure that your pay period and check date are correct!

**2** Enter **employee hours** and **other rates** here

**3** Use the bars under "Pay" to change between **Paper Check** or **Direct Deposit** (if applicable)

**4** By selecting **Default Payroll**, you can save these settings for the future.

**5** You can also record any **Time Off** taken.

**6** When you've entered and reviewed all the information, click the **Preview Payroll** button in the lower right corner

Dashboard Payroll Reports Employees Company Resources

SP Logged In as ANA

Enter Payroll

PERIOD START: Fri May 31 | PERIOD END: Wed Jul 31 | CHECK DATE: Fri Aug 02

Additional Check | Void Check | Extra Payroll

ENTER PAYROLL | PREVIEW PAYROLL | PAYROLL APPROVE

HOURLY EMPLOYEES Skip All

PAY	NAME	EARNINGS	OTHER COMPENSATION	MORE	GROSS WAGES							
Herget Frescura		RATE	VALUES	AMOUNT	TYPE	AMOUNT	TIME OFF 0 hrs	DEDUCTIONS 0	DEPARTMENTS 0	\$700.00		
		REGULAR	40 hrs	\$600.00							Select	\$
		O/TIME	5 hrs	\$100.00								

SALARY EMPLOYEES Skip All

PAY	NAME	EARNINGS	OTHER COMPENSATION	MORE	GROSS WAGES					
Doerlein Marisol		RATE	VALUES	AMOUNT	TYPE	AMOUNT	TIME OFF 0 hrs	DEDUCTIONS 1	DEPARTMENTS 0	\$1,288.22
		Regular	40 hrs	\$ 1288.22						

1099 CONTRACTORS Skip All

PAY	NAME	EARNINGS	OTHER COMPENSATION	MORE	GROSS WAGES					
Smith Mark		RATE	VALUES	AMOUNT	TYPE	AMOUNT	TIME OFF 0 hrs	DEDUCTIONS 0	DEPARTMENTS 0	\$961.54
		Regular	40 hrs	\$ 961.54						

PAYROLL SUMMARY Total Checks Paid: 3 Total Gross Wages: \$2,949.76

Reset Payroll Save Preview Payroll

## PREVIEW PAYROLL SCREEN

The **Preview Payroll** screen allows you a chance to review all the earnings, deductions, and taxes before approving.

- 7 Tasks for the completion of the current payroll are broken down into two sections: **What We Will Do** and **What You Will Do**, and will identify how much you will need to have ready for the transaction.
- 8 If, at this point, you become aware of any needed changes, click the **Edit Payroll** button to return to the **Enter Payroll** Screen.
- 9 If everything is correct, you're ready to approve your first payroll! Check the **Confirmation Box**, then click the **Approve Payroll** button to submit.

Dashboard Payroll Reports Employees Company Resources

SP Logged in as ANA

Preview Payroll PERIOD START Fri May 31 PERIOD END Wed Jul 31 CHECK DATE Fri Aug 02

ENTER PAYROLL PREVIEW PAYROLL PAYROLL APPROVED

**WHAT WE WILL DO**

<b>Payroll &amp; Taxes</b>	
Direct Deposit	\$574.95
Employee Taxes	\$125.05
Employer Taxes	\$53.55

**WHAT YOU WILL DO**

Paper Checks	\$961.54
<b>Flexible Spending Accounts (FSA)</b>	
Employee Deductions	\$1,288.22

**7**

**9**

AUTOMATICALLY WITHDRAW \$753.55 from your bank

SET ASIDE \$2,249.76 for deductions and paper checks

TOTAL PAYROLL EXPENSES \$3,003.31

I have reviewed the preview and want to approve this payroll for check date Friday, August 2, 2019. I understand that \$753.55 will be automatically withdrawn on Wednesday, July 31, 2019.

**8** Edit Payroll **Approve Payroll** **9**

Summary Details

PERIOD START Fri May 31 PERIOD END Wed Jul 31 CHECK DATE Fri Aug 02

ACME ALARMS

AUTOMATICALLY WITHDRAW SET ASIDE TOTAL PAYROLL EXPENSES

**Note:** Additional payroll information can be found under the **Summary** and **Details** tabs on the bottom half of the screen. We'll go into that on the next page.

Jul 30, 2019 5:28PM EDT

## SUMMARY & DETAILS TABS

In the **Details** tab, you will find a more detailed breakdown of the payroll you are processing. You can see each earning, tax and deduction for each employee paid on the payroll.

Summary		Details	
PERIOD START Fri May 31	PERIOD END Wed Jul 31	CHECK DATE Fri Aug 02	
<b>ACME ALARMS</b> Report Type: Payroll Preview Details			
<b>AUTOMATICALLY WITHDRAW</b>	<b>SET ASIDE</b>	<b>TOTAL PAYROLL EXPENSES</b>	
<b>\$753.55</b>	<b>\$2,249.76</b>	<b>\$3,003.31</b>	
<b>HOURLY EMPLOYEES</b>			
<b>HERGET, FRESCURA</b>			<b>NET PAY Direct Deposit \$574.95</b>
<b>EARNINGS</b>		<b>EMPLOYEE TAXES &amp; DEDUCTIONS</b>	
Type	Values	Gross Wages	Amount
REGULAR HOURLY EARNINGS	40.00	\$600.00	FEDERAL WH \$71.50 MED EE \$10.15 SOC SEC EE \$43.40
OVERTIME EARNINGS	5.00	\$100.00	
<b>TOTAL</b>		<b>\$700.00</b>	<b>\$125.05</b>
<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>		<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>	
Type	Amount	Type	Amount
MED ER	\$10.15	SOC SEC ER	\$43.40
<b>TOTAL</b>	<b>\$53.55</b>	<b>TOTAL</b>	<b>\$53.55</b>
<b>SALARY EMPLOYEES</b>			
<b>DOERFLEIN, MARISOL</b>			
<b>EARNINGS</b>		<b>EMPLOYEE TAXES &amp; DEDUCTIONS</b>	
Type	Values	Gross Wages	Amount
REGULAR SALARY EARNINGS	40.00	\$1,288.22	DEPENDENT CARE \$1,288.22
<b>TOTAL</b>		<b>\$1,288.22</b>	<b>\$1,288.22</b>
<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>		<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>	
Type	Amount	Type	Amount
	\$0.00		\$0.00
<b>TOTAL</b>	<b>\$0.00</b>	<b>TOTAL</b>	<b>\$0.00</b>
<b>1099 CONTRACTORS</b>			
<b>SMITH, MARK</b>			<b>NET PAY Paper Check \$961.54</b>
<b>EARNINGS</b>		<b>EMPLOYEE TAXES &amp; DEDUCTIONS</b>	
Type	Values	Gross Wages	Amount
REGULAR 1099 EARNINGS	40.00	\$961.54	
<b>TOTAL</b>		<b>\$961.54</b>	<b>\$0.00</b>
<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>		<b>EMPLOYER TAXES &amp; DEDUCTIONS</b>	
Type	Amount	Type	Amount
	\$0.00		\$0.00
<b>TOTAL</b>	<b>\$0.00</b>	<b>TOTAL</b>	<b>\$0.00</b>

## PAYROLL APPROVED SCREEN

The **Payroll Approved** screen gives you a confirmation that your payroll has been processed, and provides you with a reminder of **What You Will Do**. A confirmation email will be sent to the primary approver on file.

That's all there is to it!! Congratulations, you have just successfully run your first payroll.

*If you have any questions about the process, call [737-931-1413](tel:737-931-1413)*

Payroll Approved

PERIOD START: Fri May 31 | PERIOD END: Wed Jul 31 | CHECK DATE: Fri Aug 02

ENTER PAYROLL | PREVIEW PAYROLL | PAYROLL APPROVED

**WHAT WE WILL DO**

- ✓ Deposit payroll taxes with the appropriate tax agencies.
- ✓ Have Direct Deposits available by noon on Fri Aug 02.

**WHAT YOU WILL DO**

- ✓ Print and hand out checks to your employees.
- ✓ Make payments for the deductions on this payroll.

**PAYROLL EXPENSES**

AUTOMATICALLY WITHDRAW: \$753.55 (from your bank on Wed Jul 31)

SET ASIDE: \$2,249.76 (for paper checks and deductions)

TOTAL PAYROLL EXPENSES: \$3,003.31

[Return to Dashboard](#)

HAVE QUESTIONS ABOUT THE PAYROLL YOU JUST APPROVED?

Call 1-800-216-9522 | Secure Call-in ID 1389-5644  
Open M-F 8am - 9pm & Sat. 10am - 2pm EST or [Chat](#)

Note: If you are processing payroll more than two business days before the check date, you will see a pop-up that asks if you would like to **Process Early**. **Process Early** allows the payroll to be processed and reports made available online, but your bank account will not be debited earlier than the scheduled process date nor will employees be paid earlier.