

# Acumatica Payroll Setup

Presented by:



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# Session Agenda

- ❖ Version releases 2021 R1 and 2021 R2
- ❖ Learning resources
- ❖ Earning Types
- ❖ Deductions and Benefits
- ❖ PTO Banks

# Version Release Notes 2021 R1 and 2021 R2

2021 R1:

[https://help-](https://help-2021r1.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1)

[2021r1.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1](https://help-2021r1.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1)

2021 R2:

[https://help-](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1)

[2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1](https://help-2021r2.acumatica.com/Help?ScreenId=ShowWiki&pageid=258373da-50b0-4c84-94d6-78ab7f28baf1)



# Learning Sources

Acumatica Help

Community.Acumatica.com:

<https://community.acumatica.com/>

Acumatica Open University:

<https://openuni.acumatica.com/courses/fin/l100-payroll-implementation/>

KLC Vision – All Things Acumatica  
Construction



# Implementation Checklist

Payroll Basic Configuration: Implementation Checklist:

[https://help-2021r1.acumatica.com/\(W\(1\)\)/Help?ScreenId=ShowWiki&pageid=8bc40f1a-f5aa-4a1c-bcaf-babbe2e282c4](https://help-2021r1.acumatica.com/(W(1))/Help?ScreenId=ShowWiki&pageid=8bc40f1a-f5aa-4a1c-bcaf-babbe2e282c4)

Workflow of the payroll Implementation:

[https://help-2021r1.acumatica.com/\(W\(1\)\)/Help?ScreenId=ShowWiki&pageid=3fe8b703-829d-4e9c-98dd-bc121ee4e67c](https://help-2021r1.acumatica.com/(W(1))/Help?ScreenId=ShowWiki&pageid=3fe8b703-829d-4e9c-98dd-bc121ee4e67c)



# Earning Type Codes

## Earning Type Codes ☆



\* Code:

\* Description:

Earning Type Category:

Multiplier:

\* Wage Type:

\* Reporting Type:

\* Subject to Taxes:

- Active
- Contributes to WCC Calculation
- Accrue Time Off

### PROJECT ACCOUNTING SETTINGS

Default Project Code:

Default Task:

Billable

### SUBJECT TO TAXES GLACCOUNTS



Tax Code	Name
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### SUBJECT TO TAXES GLACCOUNTS

\* Earnings Account:

\* Earnings Sub.:

Benefit Expense Account:

Benefit Expense Sub.:

Tax Expense Account:

Tax Expense Sub.:

# Deduction and Benefit Codes

Contribution type can be:

- Employee Deduction
- Employer Deduction
- Both Deduction and Contribution

Can affect Tax Calculation

Benefits can be a payable benefit:

- Car Allowance

Both Deduction and Contribution can be used as in/out taxable pay for:

- Personal use of a company vehicle
- S Corp Health Insurance for Owners
- Taxable Life Insurance



# PTO Banks

## PTO Banks

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* Bank ID:	<input type="text" value="PTO - Personal Time"/>	<input checked="" type="checkbox"/> Active
Default Accrual %:	<input type="text" value="0.000000"/>	<input type="checkbox"/> Accrue on Certified Job Only
Accrual Limit:	<input type="text" value="0.00"/>	<input checked="" type="checkbox"/> Allow Negative Balance
* Disbursing Earning Type:	<input type="text" value="PT - Personal Time"/>	<input type="checkbox"/> Can Only Disburse from Carryover
Description:	<input type="text" value="Personal Time"/>	
* Start Date:	<input type="text" value="1/1/2019"/>	

### GENERAL SETTINGS

#### CARRYOVER RULES

Carryover Type:	<input type="text" value="None"/>
Carryover Amount:	<input type="text" value="0.00"/>
Pay Carryover after (Months):	<input type="text" value="0"/>

#### FRONT LOADING RULES

Front Loading Amount:	<input type="text" value="24.00"/>
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# PTO Banks

Could use Benefit code to setup accrual to GL

Can track for certified Job Federal leave

Can add more than 1 line per PTO bank for when accrual changes

Amounts can be updated using paycheck adjustment type

For questions contact us at:

[support@klcvision.com](mailto:support@klcvision.com)

402.677.5273

[www.klcvision.com](http://www.klcvision.com)



The logo features the letters 'KLC' in a bold, serif font, enclosed within a white, cloud-like outline. Below this, the word 'VISION' is written in a smaller, spaced-out, sans-serif font. The entire logo is positioned in the bottom right corner of the page, which has a white background that curves upwards from the bottom edge.

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