

## **Employee Mass Update**

Document #:	3153	Product:	CenterPoint <sup>®</sup> Payroll
The Employee Ma mass update vario	iss Updat ous types	e process can information, in	be used to update more than one employee's information at the same time. You can cluding deductions and benefits, earnings, payroll information, leave, or taxes.
For our example b	elow, the	re is a new rate	e for health insurance for next year. We will update employees with the health

insurance deduction to the new rate at once, instead of editing each employee's record individually.
Important Note: It is recommended to perform a backup of your database prior to completing the Employee Mas

Update. For more information, see the Backup and/or Restore a Single User Database topic.

## **Employee Mass Update**

- 1. Select Setup > Employees.
- On the List tab, select the employees you want to update (select multiple employees or customers by pressing the CTRL key while you make your selections) or if you do not limit your list to selected employees/customers, all employees/customers will be included in the update.

List Detail	Filter Reports
Search For	By Last Name, First Name
Current Filter	No Filter
Abbreviation	Last Name, First Name 🔺
AppleS	Apple, Sam J
AspenG	Aspen, George T
BerryJ	Berry, Jerry S
CedarS	Cedar, Stacey C
CottonJ	Cottonwood, John Q
DouglasJ	Douglas, Jeanne Z
MapleT	Maple, Ted W
OakG	Oak, Geraldine A
PinonF	Pinon, Frank R
RedwoodT	Redwood, Tim X
SapS	Sap, Stella S
SpruceJ	Spruce, Joanne A
Test	Test, test
New	Edit Delete Copy Combine Mass Update Close 🖗

- 3. Click Mass Update.
- 4. The Mass Update Wizard window will open. The wizard will guide you through the update process. **Next** proceeds through the mass update screens, **Cancel** exits the mass update screens, and **Back** returns to the previous page of the mass update. The **Back** button s is in the upper-left side of the mass update screens.
- 5. Click **Next**. Select the type of item you would like to update. The choices are General, Education, Earnings, Deductions, Benefits, Taxes and Leave. These correspond with the different tabs of the Employee setup screen.

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<	Mass Update Wizard	
	What do you want to update? General Education Deductions Benefits Taxes Leave	
G		
G		Next > Cancel

- 6. Click Next. Depending on the selection you made in Step 5, screens will display asking you to make other selections. For example, if you chose to update Earnings, you will need to select the earning that should be updated or determine if you want to update all earnings, the information that should be changed for the earning (rate, rate percent increase (decrease), display in Pay Employees grid, expense account, profit center, account distribution, etc.). If you chose to update Benefits, you will need to select the benefit that should be updated., the information that should be changed for the benefit (rate, expense account, annual limit, etc.). Click Next after responding to each screen.
- 7. A list of all employees that have the specified information assigned to them will display. If you do not want to update all the selected employees, you can unselect employees by pressing the CTRL key while clicking on the employee. Specify the value with which to update the selected items. Click **Next**.

Employee (Abbrv.)       Employee       Deduction (Abbrv.)       Deduction       Rate         SpruceJ       Joanne A Spruce       401kPront       401k Percent of Wages       0.00000000         PinonF       Frank R Pinon       401kPront       401k Percent of Wages       0.00000000         OakG       Geraldine A Oak       401kPront       401k Percent of Wages       0.00000000         MapleT       Ted W Maple       401kPront       401k Percent of Wages       0.00000000         CadarS       Stacey C Cedar       401kPront       401k Percent of Wages       4.00000000         AppleS       Sam J Apple       401kPront       401k Percent of Wages       5.000000000	Ma Sp	ess Update Wizard	ith which to update	e the selected items:		Į
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		AppleS	Sam J Apple	40 1kPrcnt	401k Percent of Wages	5.0000000
Change selected values to: 0.0000000% 6/6	C	hange selected values t	o: 0.000000	00%		6/6

- 8. Verify the employees/customers that will be changed and then click Next.
- 9. At the These changes will be saved to the database, are you sure? message, click Yes to finalize the change.
- 10. Click **Finish** to exit, click **Back** to perform a similar update, or click **New** to prepare a new update.