

## Payroll Preferences

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| <b>Document #:</b> | 3357 | <b>Product:</b> | CenterPoint Payroll |
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Preferences define how you want your CenterPoint program to behave and can be changed at any time. If you change a preference and are currently in the screen that uses that preference, close the screen and then enter the screen again to initiate the preference.

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### How are the different tabs used?

Preferences can be set at different levels. The preference level is a hierarchy, for example, the Global level will be used if no Application, Database, or User levels are set. The levels are accessed with the tabs across the top of the Preferences screen.

**Current Settings:** Simply displays the settings that are currently being used.

**Global:** The Global level is typically used when your system is a network. The Global level affects all databases on the network. This allows a network administrator to setup Preferences just once and they will be used for all Database & all Users within that network setting.

**Application:** If the Preferences are set at the Application level, then all users of all databases will have the same Preferences.

**Database:** Preferences set at this level will affect each individual database separately. One can then have different settings for each Preference in each database.

**User:** Preferences set at the User level will only affect that user. This tab is not available on all preferences and is only available if you use Database Security.

### What are some of the common Payroll Preferences that are used?

#### » Accounts Settings Preferences

##### » Set Account Number Mask

» Defines the account number mask (format) for the account number box , up to 22 non-literal characters maximum. Setting a format secures account number conformity. The account number can be set to be required or not required. Masks can be set to be numeric, an alphanumeric, or an alphabetic field.

1. In the box at the bottom of the mask descriptions, enter # to set a required number placeholder. For example, ##### represents an account number format that is required that uses four numbers such as 5410.
2. Or, in the box at the bottom of the mask descriptions, enter 9 to set a number placeholder that is not required. For example, 9999 represents an account number format that is not required that uses four numbers such as 7891.
3. Or, in the box at the bottom of the mask descriptions, enter A-Z to set a alphanumeric placeholder that is required. For example, aaaa represents an

account number format that is not required that uses four alphanumeric characters such as AB10.

4. Or, in the box at the bottom of the mask descriptions, enter a-z to set a alphanumeric placeholder that is not required. For example, aaaa represents an account number format that is not required that uses four alphanumeric characters such as AB10.
5. Or, in the box at the bottom of the mask descriptions, enter ? to set a required alphabetic placeholder. For example, ???? represents an account number format that is required that uses four alphabets such as LAND.
6. Or, in the box at the bottom of the mask descriptions, enter & for any character including spaces. For example, 99&9999 would represent an account number format that is not required that uses two numbers, a space, and four additional numbers such as 10 1234.
7. All other characters are literal characters that display as themselves. 22 non-literal characters maximum.

## » **Bi-Weekly Pay Periods (File > Preferences > Payroll > Bi-Weekly Pay Periods)**

### » **Bi-Weekly Settings:**

- » If you have salaried employees that are paid on a bi-weekly schedule, every few years there will be 27 pay periods in a year, rather than the usual 26. Without changes to your payroll setup, this will result in an extra pay check for salaried employees (so they are paid more than their salary for the year), or skipping a check which can cause hardship for employees.
- » In CenterPoint, you can set a preference for the number of bi-weekly pay periods in a year. For years with 27 pay periods, this will calculate the employee's per pay check salary based on 27 instead of 26 pay periods. Employees will still receive a pay check every pay period but each check will be for slightly less so they do not get paid more than their yearly salary.

## » **Salary Hours (File > Preferences > Payroll > Salary Hours)**

- » **Pay Periods** - This preference allows you to determine if the Hours Offered and Hours Worked fields should auto-fill with the default hours set in this preference for salary earning types. The defined default pay periods are listed, but can be changed.

## » **General (File > Preferences > Payroll > General)**

- » **Decimal Places** - This preference gives you options for setting the number of decimal places to use for hours, rate, pieces, and tax percentages.
- » **General Ledger Posting** - This preference determines how CenterPoint will post payroll transactions to your General Ledger. Payroll transactions can post to the General Ledger in either Detail (employee detail for each check) or in Summary (no check detail).
- » **Pay Run Validation** - This preference allows you to set the way a pay run is validated if a "management detail" (profit center/department, production center, project, production year/tracking field 1, or production series/tracking field 2) is missing during processing and allows a "management detail" pay run validation set to Required to be skipped if that earning is using an Account Distribution.
- » **Exclude Zero Rate Earnings from Average Rate Calculation** box, determine if the average rate used for overtime calculations includes/excludes earnings that have no rate.
  - » When the preference is set to Yes, if there are three overtime earnings with amounts of \$120, \$120 and \$0 and hours of 8, 8, and 8. The Average Rate on all three overtime earnings will be  $\$120 + \$120 / 8 + 8 = \$15.00$ . The 8 hours for the overtime earning with an amount of \$0 is excluded from the calculation of the average rate.

- » When the preference is not set or set to No, if there are three overtime earnings with amounts of \$120, \$120, and \$0 and hours of 8, 8, and 8. The Average Rate on all three overtime earnings will be  $\$120 + \$120 + \$0 / 8 + 8 + 8 = \$10$ . The 8 hours for the overtime earning with an amount of \$0 will not be excluded from the calculation of the average rate.
- » **Leave (File > Preferences > Payroll > Leave)**
  - » This preference allows you to determine if you want to perform your leave calculation using your check date (date pay run is printed and posted) or pay period to date (more accurate leave calculation for dates near employee eligibility dates), and display a message when adding more hours than available for leave earnings when entering leave hours, switching to another employee's pay (including time sheets), or leaving the Enter Pay tab or saving the pay run without switching to enter pay (including time sheets).
- » **Pay Dates (File > Preferences > Payroll > Pay Dates)**
  - » This preference gives you options for setting how you want to display default Pay Period From and To dates and Pay Dates on the 1.Select Employees tab in Pay Employees. The options are "No" which will display blank dates or "Yes or Not Set" which will display default dates.
- » **Printing - Advices (File > Preferences > Payroll > Printing > Advices)**
  - » This preference allows specification of Printer, Advice and Stub layout, as well as various options to print or suppress certain advice information. It also allows larger payroll check/advice print-jobs to be broken into smaller print jobs improving the speed at which the checks/advices are sent to the printer.
- » **Printing - Checks (File > Preferences > Payroll > Printing > Checks)**
  - » This preference allows specification of Printer, Check and Stub layout, as well as various options to print or suppress certain check information. It also allows larger payroll check/advice print-jobs to be broken into smaller print jobs improving the speed at which the checks/advices are sent to the printer.
- » **Timesheets (File > Preferences > Payroll > Timesheets)**
  - » **Time Format** - This preference gives you options that set the time format you want to use when you enter time sheet start/stop times; the options are Military or AM/PM.
  - » **Hide Simple Overtime Calculation** - When time sheets are imported and this preference is set to No or Not Set, a Import Time Sheets screen will display with a Perform Simple Overtime Calculation selection, Earning to move the specified number of hours over to the Earning provided overtime earning at time and a half, Period (weekly or bi-weekly), and a Do Not Prompt selection that is active only when the Perform Simple Overtime Calculation box is not select and if selected this preference will be set to Yes and the allows you to set the preference to Yes.
- » **Warnings (File > Preferences > Payroll > Warnings)**
  - » This preference allows you to specify whether you want to display warning messages when a Tax State, SUTA State, or Workers' Compensation Class is not entered in Setup > Employees when an employee is saved.
- » **Security (File > Preferences > Security > Database Security)**
  - » **Database Security** - Decide if the system should use security (requires the use of usernames and passwords to open CenterPoint). To password protect a database, the Database Security preference must be selected.
- » **Interfaces (File > Preferences > Interfaces)**
  - » **TurningPoint** - If this preference is enabled, CenterPoint Payroll will interface to TurningPoint General Ledger so payroll activity is recorded in the accounting software. Once the interface is setup, payroll transactions posted in CenterPoint Payroll will automatically create an unposted batch in TurningPoint General Ledger (General Ledger > Transactions > Entry).
  - » **JobBOSS** - If this preference is enabled, when CenterPoint Payroll is posted, the General Journal Entries for posted pay runs are posted to JobBOSS General Ledger. The Employee check detail and Employer (taxes and benefits) are posted by default. You can choose to post only the Employee checks if you prefer.

- » **QuickBooks** - If this preference is enabled, when CenterPoint Payroll is posted, the payroll journal entries will automatically export and create QuickBooks general journal entries for the employee checks, employer payroll liabilities, and other current liabilities. Each CenterPoint employer expense transaction creates a QuickBooks general journal entry transaction for payroll or other liabilities in QuickBooks. The QuickBooks general journal entry will be summarized by account and class.

## Preferences for the Advanced Earnings Module

- » **Advanced Earnings Matrix (File > Preferences > Payroll > Pay Defaults)**
  - » If you purchased the Advanced Earnings Matrix additional payroll option, this preference selection is used if your employee pay rates vary by profit center, location, department, project, tracking number 1, tracking number 2, or pay default. Follow the [Advanced Earnings Matrix](#) topic for more information.
- » **Pay Defaults (File > Preferences > Payroll > Pay Defaults)**
  - » If you purchased the Advanced Earnings Matrix additional payroll option, this preference selection is used if your employee pay rates vary and you selected to vary by pay defaults in the Default Earning Rates preference. The custom name fields labels will display in Setup > Payroll Details > Pay Defaults so you can enter information about the label and then that information will display in Setup > Payroll Details > Default Earning Rates as read-only information fields. Follow the [Advanced Earnings Matrix](#) topic for more information.