

HOW TO DELETE AN EMPLOYEE

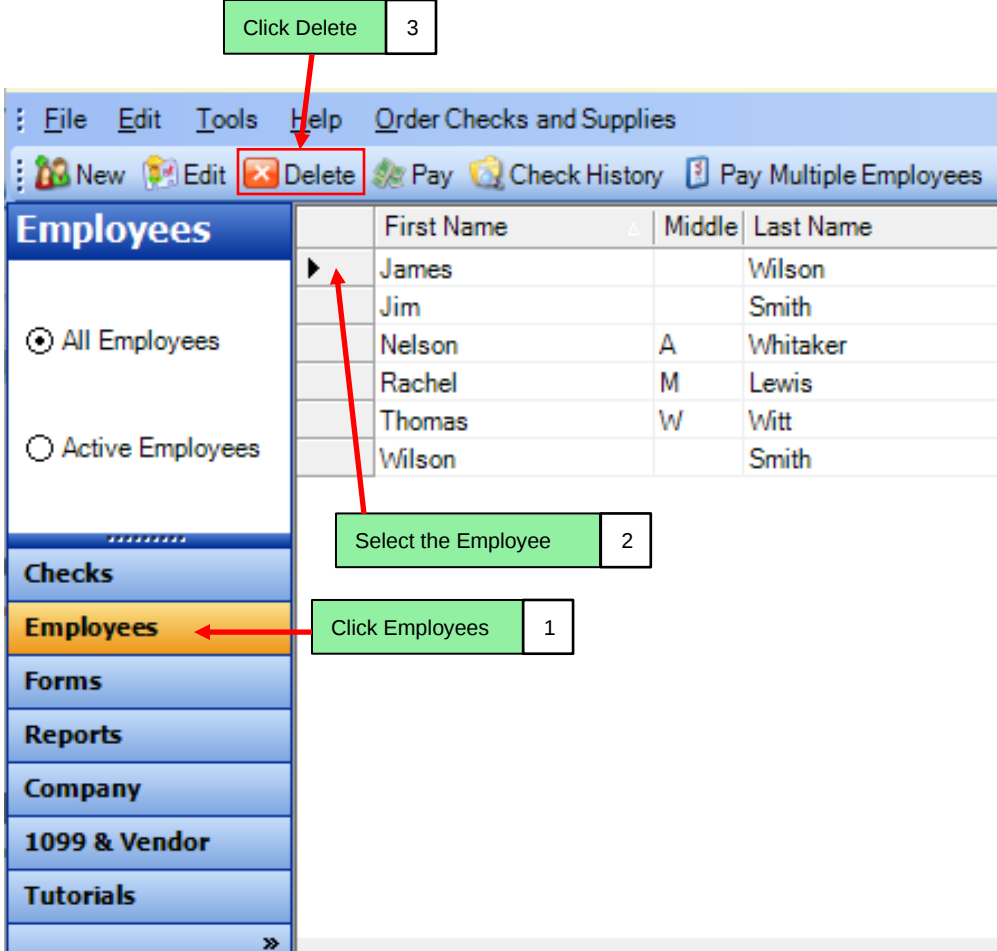
Question

PLEASE REFER TO THE STEPS BELOW:

Answer

Make sure you are in the correct company.

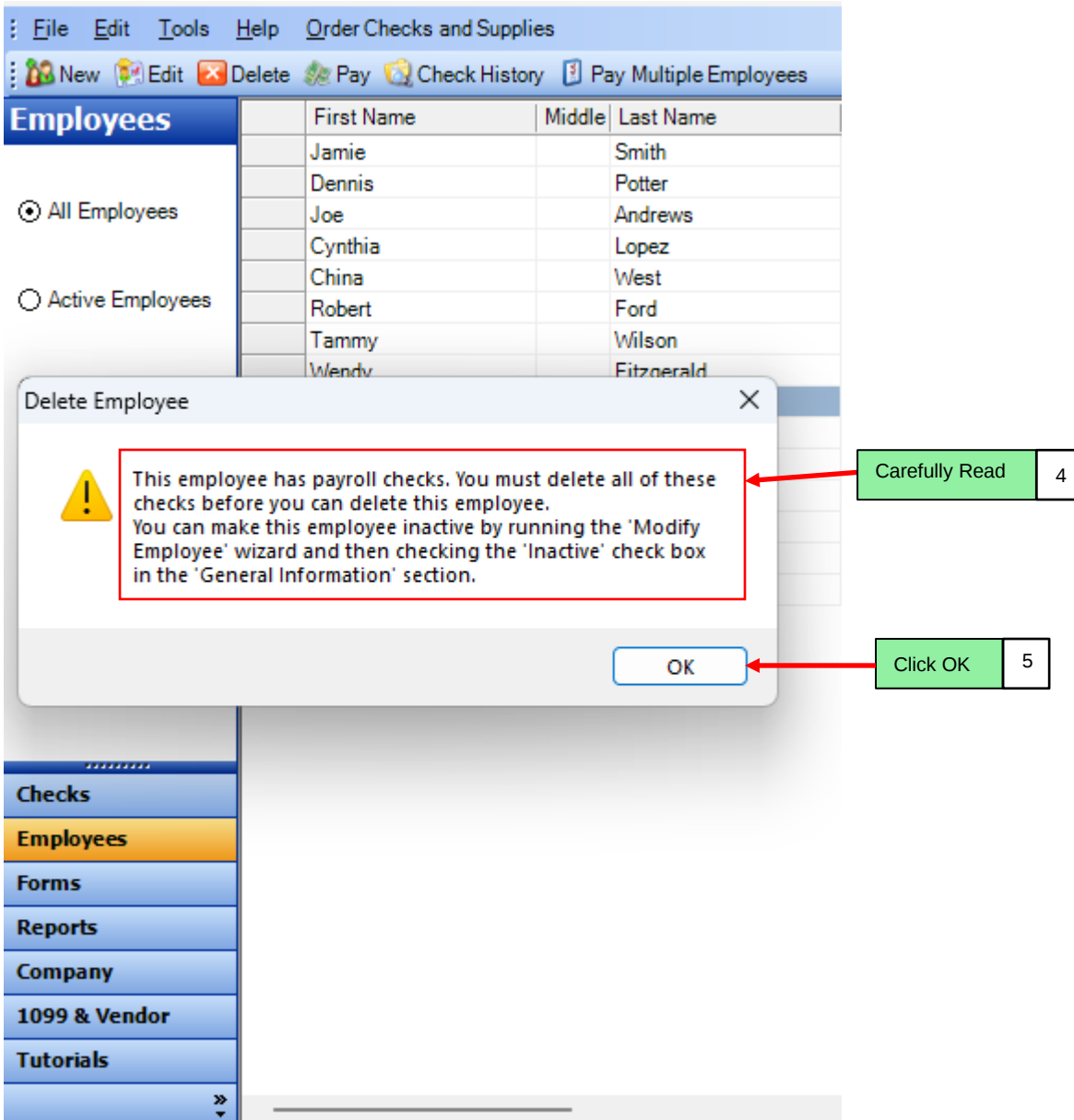
1. Click **Employees**
2. Select the **Employee** to be deleted
3. Click **Delete**



The screenshot shows the Payroll Mate software interface. A red arrow points from the 'Delete' button in the top menu bar to a callout box labeled 'Click Delete' with the number 3. Another red arrow points from the 'Employees' button in the left sidebar to a callout box labeled 'Click Employees' with the number 1. A third red arrow points from the first row of the employee list (James Wilson) to a callout box labeled 'Select the Employee' with the number 2.

	First Name	Middle	Last Name
☒	James		Wilson
☐	Jim		Smith
☐	Nelson	A	Whitaker
☐	Rachel	M	Lewis
☐	Thomas	W	Witt
☐	Wilson		Smith

4. **Carefully Read** the Delete Employee dialog information
5. Click **OK**



The screenshot shows the Payroll Mate application window. The 'Employees' tab is selected, displaying a list of employees. A 'Delete Employee' dialog box is open, showing a warning message. The message text is highlighted with a red box. A red arrow points from a green box labeled 'Carefully Read' with the number '4' to the highlighted text. Another red arrow points from a green box labeled 'Click OK' with the number '5' to the 'OK' button in the dialog box.

First Name	Middle	Last Name
Jamie		Smith
Dennis		Potter
Joe		Andrews
Cynthia		Lopez
China		West
Robert		Ford
Tammy		Wilson
Wendy		Fitzgerald

Delete Employee

⚠ This employee has payroll checks. You must delete all of these checks before you can delete this employee. You can make this employee inactive by running the 'Modify Employee' wizard and then checking the 'Inactive' check box in the 'General Information' section.

OK

Carefully Read 4

Click OK 5

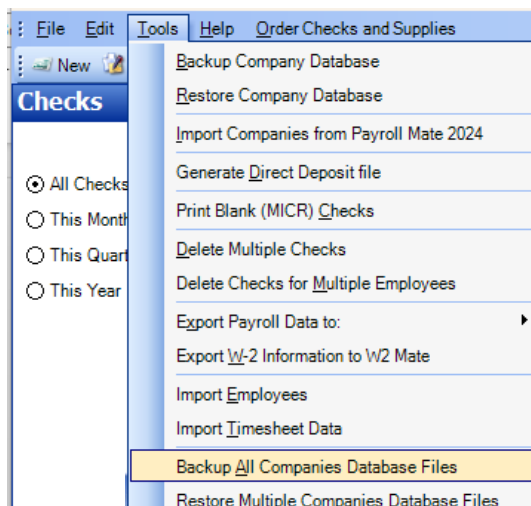
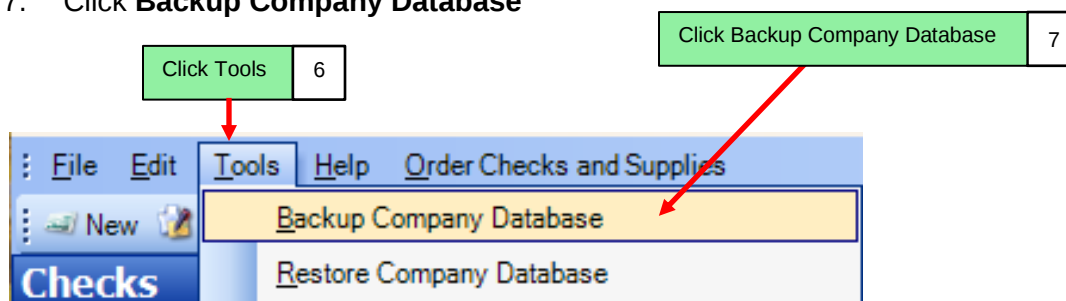
Before deleting all the payroll checks for the employee, you want to delete, we highly recommend performing a backup.

WARNING!!!

1. Please note that deleting checks can have an impact on your tax reports and forms. Please seek tax advice before you delete any checks.
2. It is highly recommended to backup your company database before proceeding with this operation.

To Back up a company:

6. Click **Tools**
7. Click **Backup Company Database**



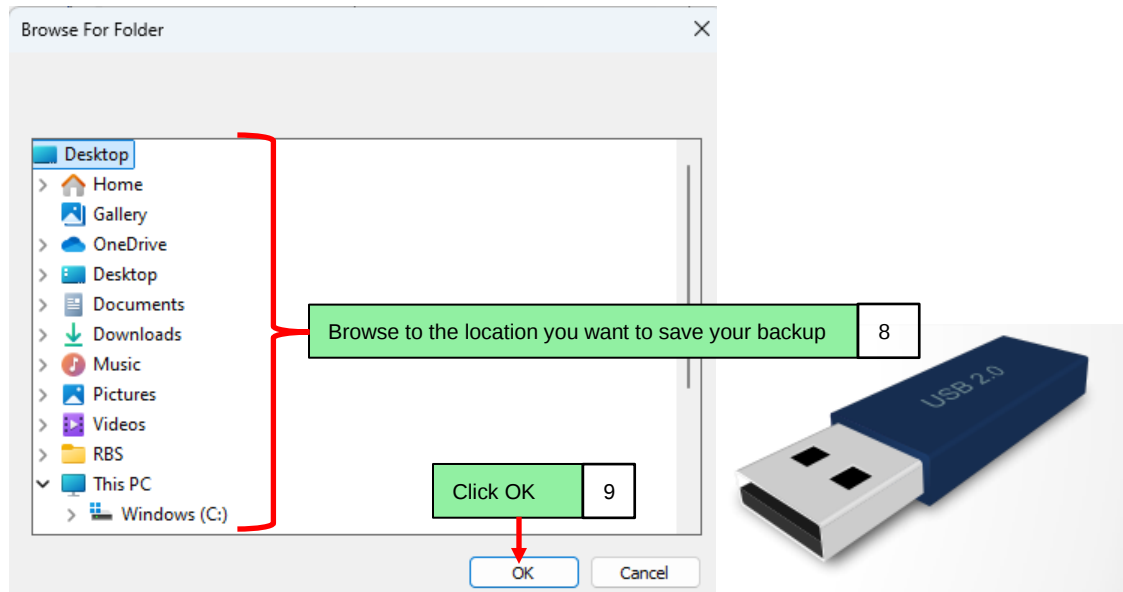
NOTE: If you have more than one company which you need to delete checks, you can either:

Backup All Companies Database Files

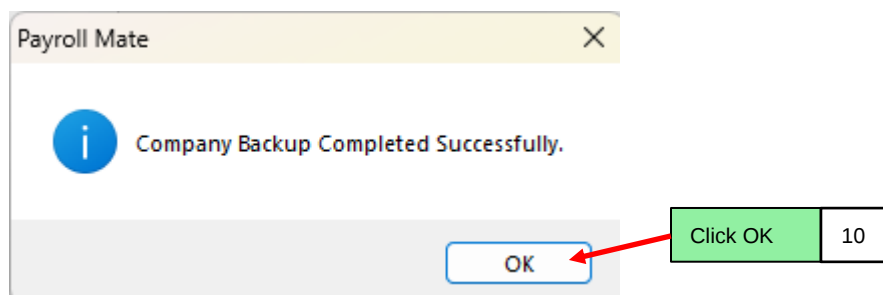
Or

Backup Company Database for each company, but you will need to be within each respective company when you perform the backup for each company.

8. A dialog box will open for you **browse to the location you want to save your backup**
We always recommend you backup your data to an external drive, or a USB.
9. Click **OK**

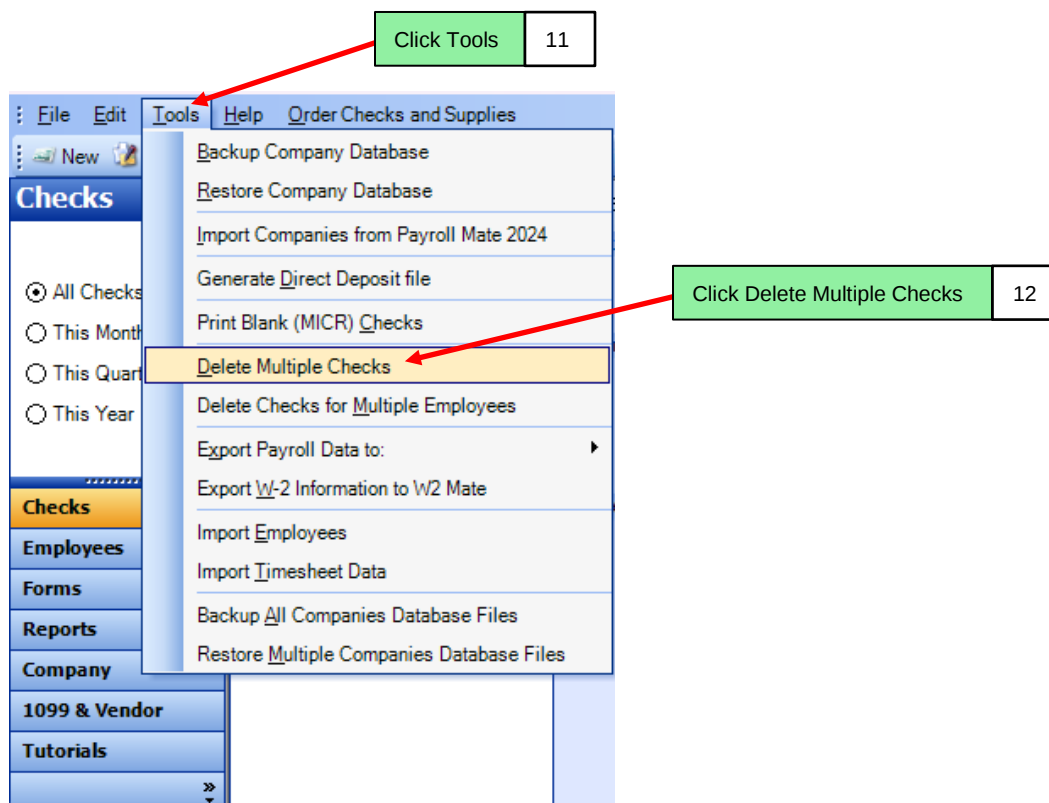


10. Once the backup is complete, a dialog box will display, Company Backup Completed Successfully, Click **OK**

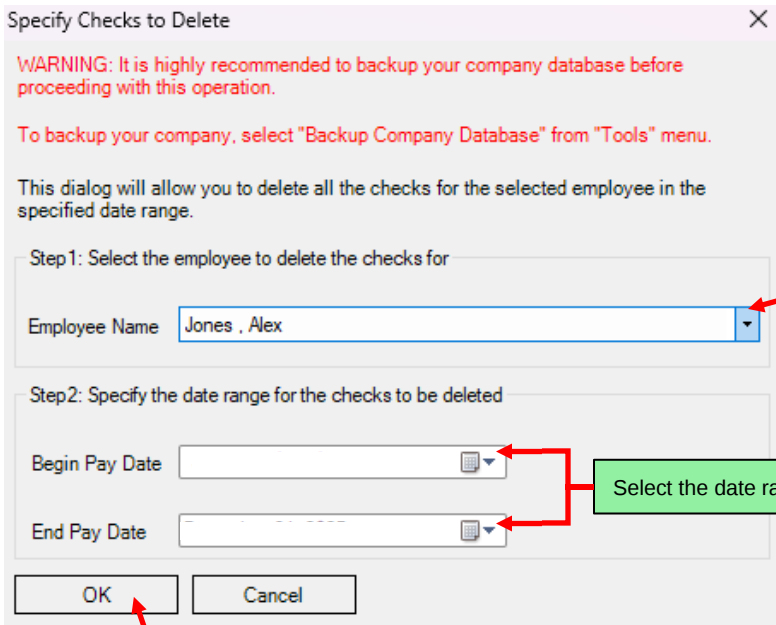


Now you can proceed with deleting all of the payroll checks for the employee you want to delete

11. Click **Tools**
12. Click **Delete Multiple Checks**



13. Specify Checks to Delete dialog box will open, **Select the employee's name** you would like to delete multiple checks for.
14. **Select the date range** for the checks to be deleted
15. Click **OK**



Specify Checks to Delete

WARNING: It is highly recommended to backup your company database before proceeding with this operation.

To backup your company, select "Backup Company Database" from "Tools" menu.

This dialog will allow you to delete all the checks for the selected employee in the specified date range.

Step 1: Select the employee to delete the checks for

Employee Name:

Step 2: Specify the date range for the checks to be deleted

Begin Pay Date:

End Pay Date:

OK Cancel

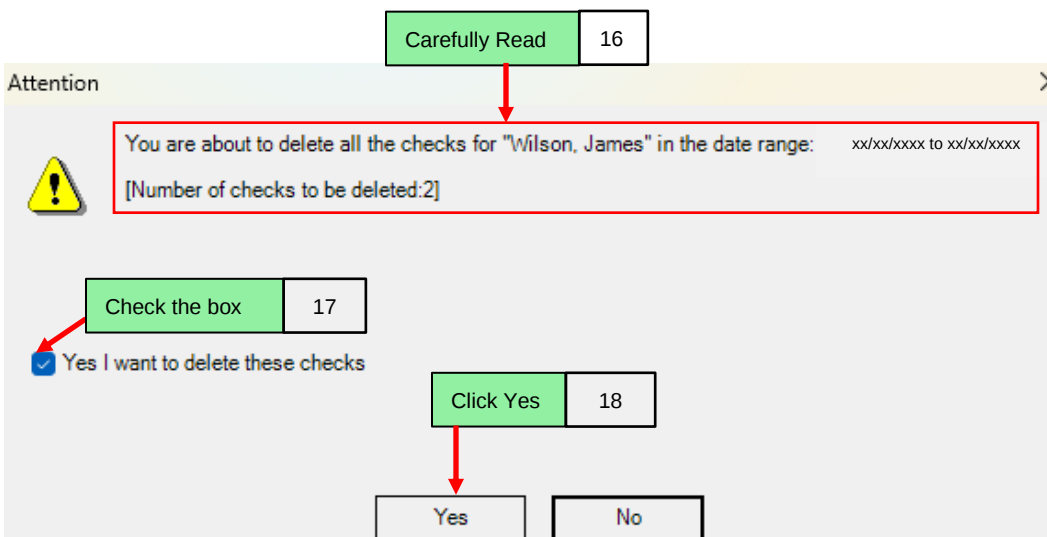
Select the employee's name 13

Select the date range 14

Click OK 15

NOTE: Use Pay Dates, **not** pay period for the date range.

16. **Carefully Read** the attention dialog box information. The purpose for this is to confirm you want to delete multiple checks within the date range and how many checks will be deleted.
17. **Check the box** confirming you want to delete these checks
18. Click **Yes**



Attention

Carefully Read 16

You are about to delete all the checks for "Wilson, James" in the date range: xx/xx/xxxx to xx/xx/xxxx

[Number of checks to be deleted:2]

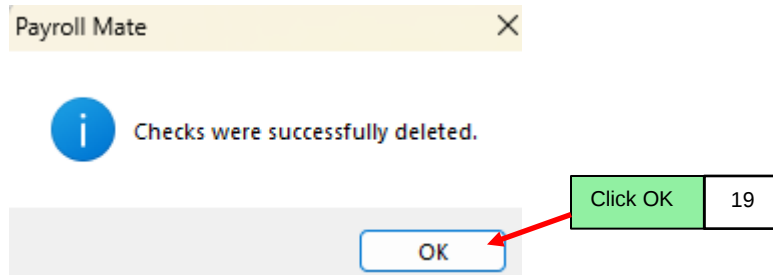
Check the box 17

☒ Yes I want to delete these checks

Click Yes 18

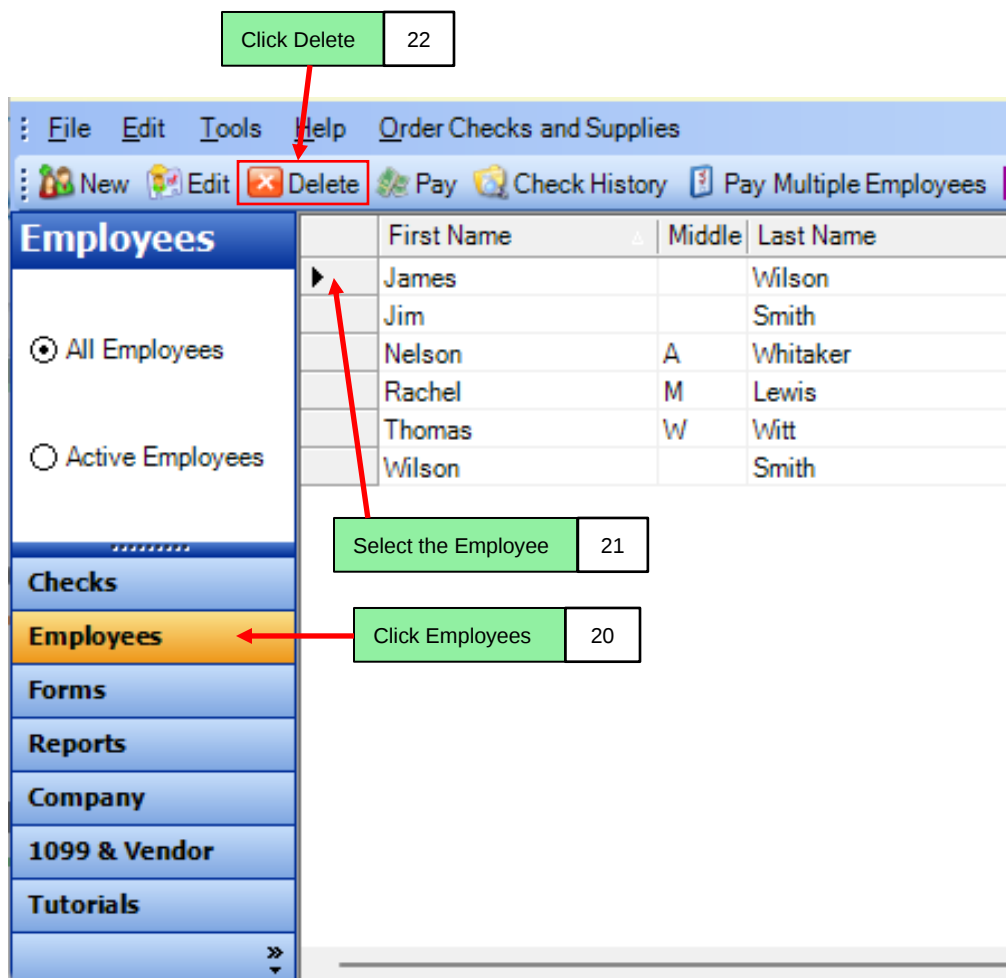
Yes No

19. You will get a confirmation that the checks were successfully deleted, click **OK**

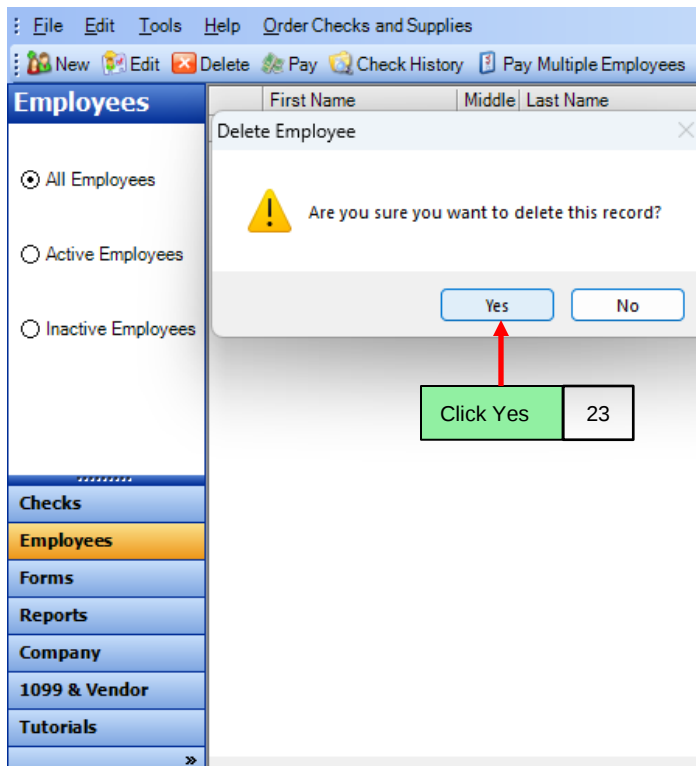


Now you can Delete the Employee

20. Click **Employees**
21. **Select the Employee** to be deleted
22. Click **Delete**



23. Click Yes



The employee should no longer appear in the employee list

