

HOW TO HANDLE DEPARTMENTS WITH PAYROLL MATE

Question

PLEASE REFER TO THE STEPS BELOW:

Answer

Please Note

To utilize departments for reporting, you will need to purchase and enable optional feature

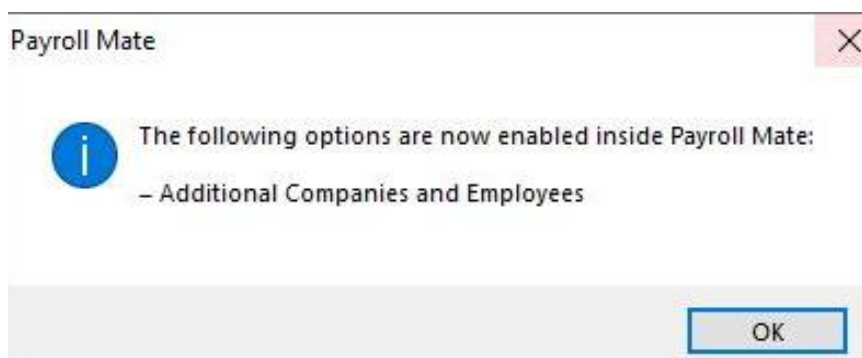
Payroll Mate Option #3 Additional Companies & Employees + Timesheet Import + Department Support), in addition to the purchase of Payroll Mate Software PC Download.

Once you make your purchase you will receive a code in your email. You will need to enable the optional feature within the software by:

Click > **“Edit”** > **“Enable Optional Features”** > **enter the code** sent to you in your email > Click **“Ok”**.

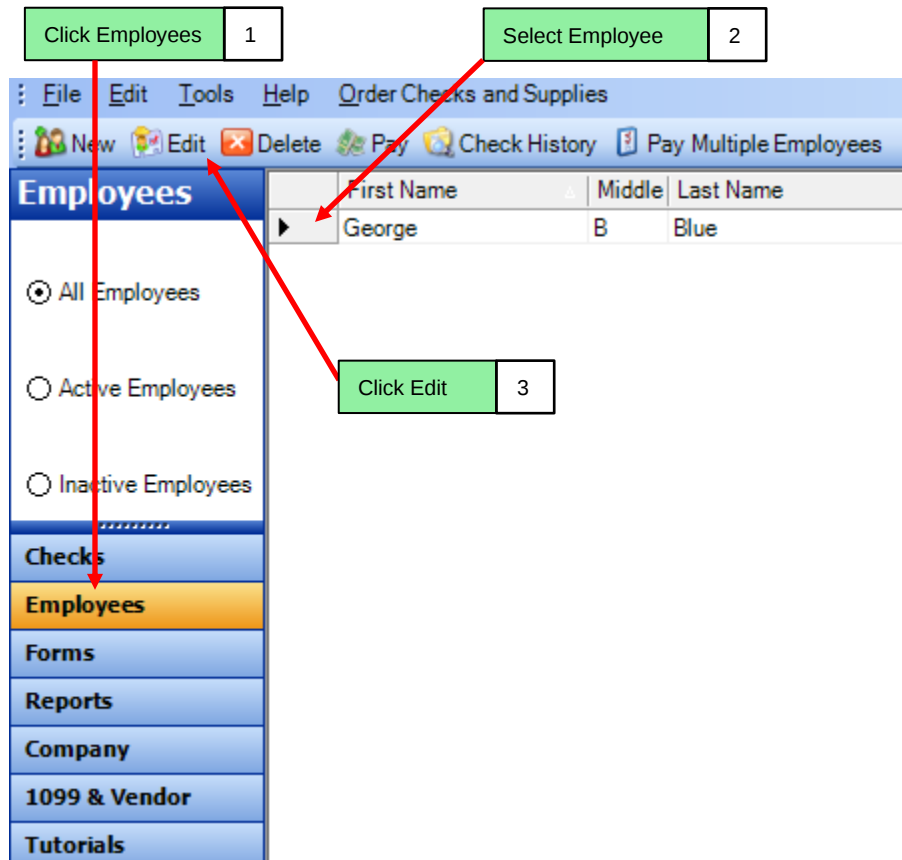
Once you have enabled your code. You will receive this message within Payroll Mate software.

***If you have already purchased Payroll Mate Option #3 Additional Companies & Employees + Timesheet Import + Department Support) and have already enabled your optional feature code please scroll to the next page.**

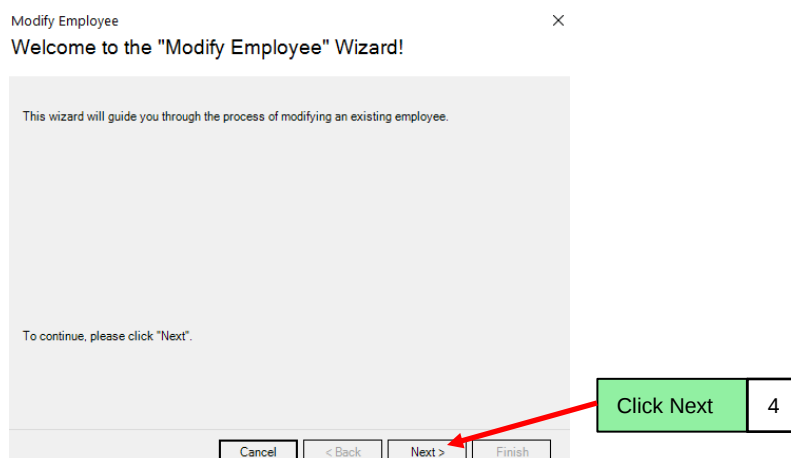


How to set up Departments:

1. Click **Employees**
2. Select the **Employee** that you would like to **assign a department**
3. Click **Edit**



4. Welcome to the Modify Employee Wizard will appear, click **Next**



5. Within the General Information screen, select **View/Edit Departments**

Modify Employee ×

General Information

Name:	George	B	Blue
Address1:	12346 W Blue Ave		
Address2:			
City / State / Zip Code:	Orland Park	IL	60452
Social security number:	111-11-1111		
Date of Birth (MM/DD/YYYY)	11/13/1999		
Phone / Fax / Email:	(111) 111-1111		
Employee ID:			
Department:		View/Edit Departments...	
☐ Inactive			
Memo:			

Cancel < Back **Next >** Finish

Select View/Edit Departments
 5

6. You will be taken to the Departments Explorer screen, select **New**

Departments Explorer ×

List of Departments:

New Edit Delete

Close

Select New
 6

7. Enter **Department Name** you wish to create
8. Click **OK**

Department Information ×

Department Name

Department Abbreviation

Enter Department Name 7

Click OK 8

9. **Select the Department** you created
10. Click **Close**

Departments Explorer ×

List of Departments:

☒ Example:

Select the Department 9

Click Close 10

11. **Select the department** you created from the Department drop down
12. Click **Next**

Modify Employee ×

General Information

Name:

Address1:

Address2:

City / State / Zip Code:

Social security number:

Date of Birth (MM/DD/YYYY):

Phone / Fax / Email:

Employee ID:

Department:

☐ Inactive

Memo:

Select the department

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Click Next

12

Continue to click Next until you reach the **Finish** screen

13. Click **Finish**

Modify Employee ×

Finish

Wizard completed, please click "Finish" to update this employee information.

Click Finish

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