

# Sage Business Cloud Accounting: Payroll

# Payroll







## Learning Objectives

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After completing this module, you should be able to:

- Add 3<sup>rd</sup> party apps from the Sage Marketplace to grow your business
- Add and integrate **PaymentEvolution** with **Accounting**
- Add employees to Payroll
- Create a Payroll Profile
- Run Payroll
- Run Payroll Reports

**NOTE** Throughout the duration of the course, you will encounter important icons and visual conventions as part of your learning experience to guide learners through the chapters. Some of the cues are indicated here.

	<b>Important Information / Important Note / Additional Information</b>	Item where caution and attention is required or additional insight and information is provided.
	<b>Exercise</b>	Your opportunity to practice a concept.
	<b>End of Exercise</b>	Indicates the end of an exercise.
	<b>Check Your Knowledge</b>	Review questions at the end of a lesson to check your understanding and ability to implement concepts.
	<b>Summary</b>	Overview of the most important items covered in a section or lesson.
	<b>End of Lesson</b>	The end of the lesson.

It's the start of a new business year for Divine Chocolates. Much to their delight, they were successful in their first year and Christina has picked up a lot of new business. Her sales for weddings have increased for both wedding favors and catering, but she's also opened a kiosk at the local mall. She's hired two full time employees to run it. She's also hired employees to run the catering for her wedding and corporate events as well as candy makers for her kitchen. With the introduction of new employees Christina needs to incorporate payroll into her administrative tasks to ensure employees get paid and on time.

As businesses grow, **Accounting** has the ability to grow with a company due to a wide variety of connected apps through the **Sage Marketplace**. Apps such as *Expensify*, *Hubdoc*, *Avalara* and *ePos* to name just a few. Cristina has opted to utilize **PaymentEvolution** as part of **Accounting** for her payroll needs which can be found in the **Sage Marketplace**.

## PaymentEvolution

**PaymentEvolution** is a full-service cloud payroll software offering payroll, payments and benefits to small businesses all around Canada. PaymentEvolution has helped 18,000 businesses by providing fast, precise payroll calculations, offering direct deposit payments saving time on payroll administration.

1. Navigate to the Sage Marketplace: <https://www.sage.com/marketplace>
2. In the search bar type, **Payment Evolution:**



[Go to Sage.com](#)payment evolution 

## Sage Business Cloud Marketplace

Extend the power of Sage Business Cloud to grow your business  
and make life easier with over 100+ connected Apps

### Categories

#### All Categories

- Accounting
- Billing and Invoicing
- Budgeting and Forecasting
- Business Management Solution
- CRM
- Data integration
- Debt tracking
- Document management
- E-commerce
- EDI
- Expense management
- Finance
- GDPR
- Inventory

All countries ▾

All products ▾

Sort by: Relevance ▾




American Express  
A solution to help manage the  
complete B2B relationship.



Payonomy  
Native App - Direct Debit  
Management For Sage Business

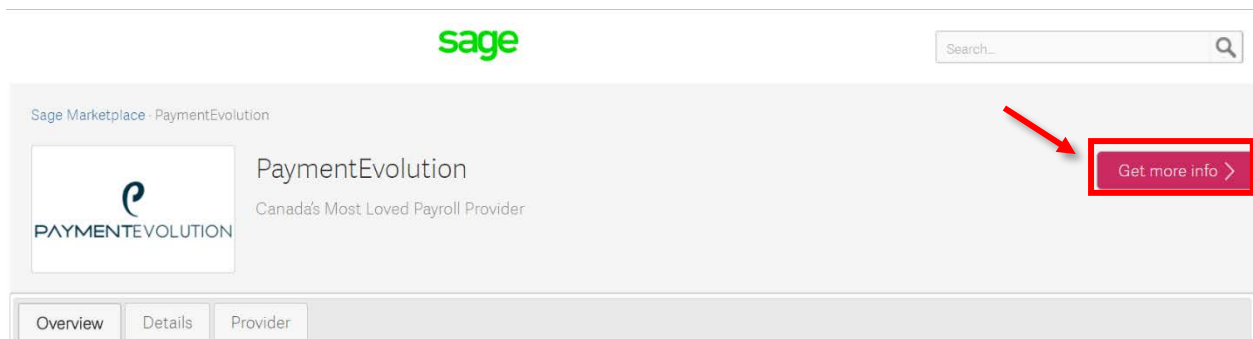


Income Systems  
Submitting payment instructio...  
on behalf of service users




PaymentEvolution  
Canada's Most Loved Payroll  
Provider

### 3. When the app launched, click **Get More Info**



Sage Marketplace - PaymentEvolution

 PaymentEvolution  
Canada's Most Loved Payroll Provider

[Get more info >](#)

Overview Details Provider

### 4. Input the required information and click **Go To Partner Site:**

**Get More Info**

First Name \*      Last Name \*

Kim      Steward

Company

Sage

Email \*

kim.steward@sage.com

By checking the box and submitting my information to Sage, I agree to Sage disclosing my information to the selected partner/third party I have chosen and for Sage to use my information in accordance with Sage's Privacy Notice.

[Go to Partner site >](#)

5. Select **Get Started** in the top right-hand corner:

PAYMENTEVOLUTION

Home / Add-ons / Sage One

**sage One**

Sage One - simple and powerful cloud accounting

The PaymentEvolution and Sage One integration allows you to export your payroll reports from your PaymentEvolution account, directly to your Sage One account in just the click of a button. All payroll reports are automatically sent to the businesses Sage One account at the end of the payroll period.

**Better Together**

- Finalized payroll runs are posted into Sage One - making it simple to keep track of your payruns.
- Your custom chart of accounts (GL codes) can be imported into PaymentEvolution to make the integration seamless.
- Keep track of your CPP, EI and other obligations - it's all recorded in Sage One.

**Connect Sage One with PaymentEvolution Payroll**

- It's all online, so you can work when and where you want to. Just login with your PC, MAC, tablet or mobile.
- Calculate your employee payroll in just a few seconds.

**How Sage One Integrates**

**Payroll**  
PaymentEvolution Payroll is fully integrated with Sage One for easy posting of your payroll transactions. By connecting PaymentEvolution Payroll and Sage One you'll be able to better keep track of payroll payments, remittances and other employee benefit obligations.

**Business Payments**  
Sage One invoices (bills) are currently not available for processing electronically via Business Payments. This feature is coming soon.


Features - Plans - Tools - Contact - Log in **Get Started**


6. **PaymentEvolution** is offered at no charge by selecting the '**Green**' plan for up to 5 employees. *Students should **Register** for this option.*

Welcome! Choose a plan to get started

choose your plan	Green	Business	Business Plus
	\$0	\$22 per month	\$1.50 per employee
Trial		✓	
Full Payroll: pay runs, reports, create T4/RL1, create ROE, electronic payslips	✓	✓	✓
Custom Pay Rules		✓	✓
Custom Vacation Rules		✓	✓
Add-ons	✓	✓	✓
Your brand			✓
Employees	up to 5	more than 5	best for 20+
Support	Online forum	Forum, Email, Phone	Forum, Email, Phone
	register	register	contact

I'm a bookkeeper or accountant - [show me plans for my clients](#)

7. To select a plan other than the default offering, click **Change**  from the blue menu bar.

You've selected the Business Plan (\$22/month). You'll be up and running with payroll right away. **Change**  we need a few details first

**CREATE COMPANY PROFILE** Register

E-Mail:

Company Name:

Password:  Confirm Password:

First Name:  Last Name:

Address Line 1:

Address Line 2:

City:  Province/State:

Postal/Zip Code:  Country:

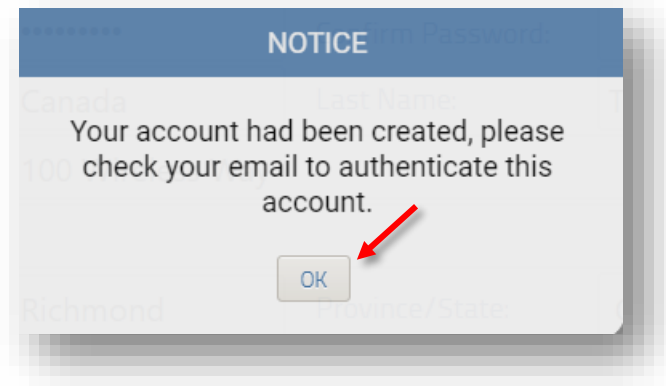
Telephone Number:

Payroll Year:

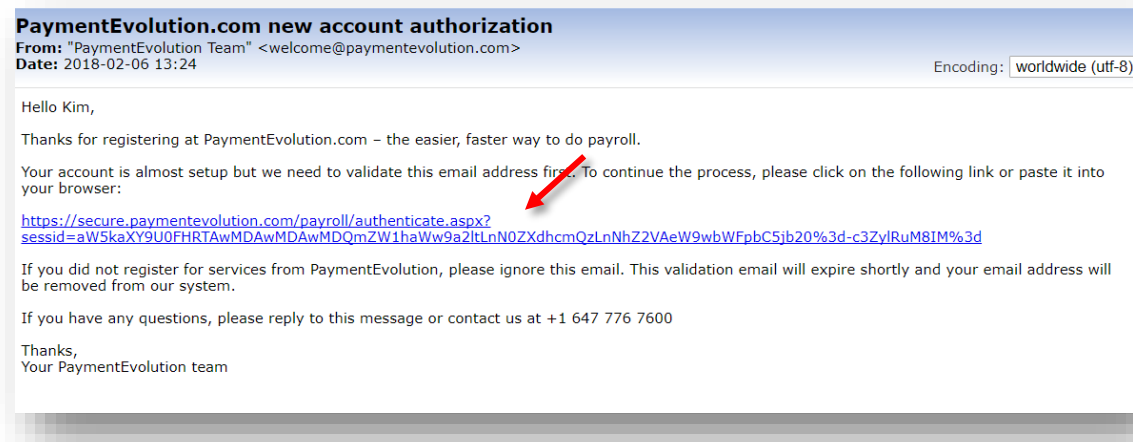
Referral Email or Code:

I accept the [terms](#) of PaymentEvolution

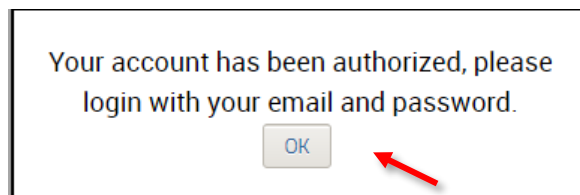
- Accept the terms and click **Register**. You'll receive notification that a PaymentEvolution account has been created.



- Navigate to your email to confirm the account.



- Click the validation link contained within the body of the email. Your account is now authorized:



11. You will be navigated back to the **PaymentEvolution** login screen. Input your user name and password just created when setting up your **PaymentEvolution** account and click **Login**:

PAYMENTEVOLUTION

MAIN LOGIN EMPLOYEE LOGIN

COMPANY LOGIN

Registered User

Email Address test11@yopmail.com

Password \*\*\*\*\*

Login Forgot your password?

JOIN NOW

Create a new account

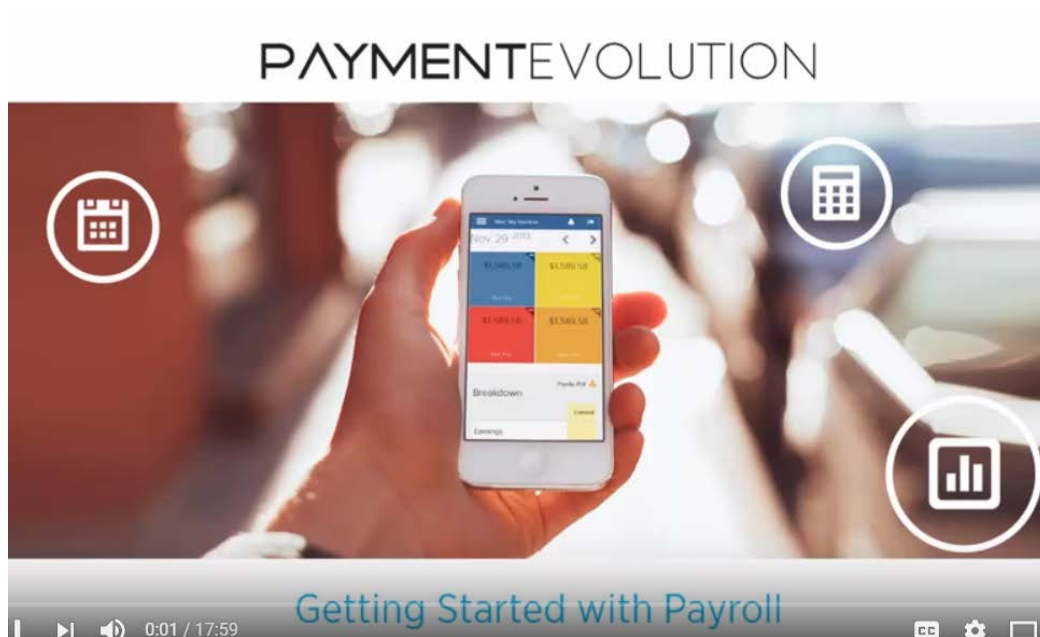
- ✓ No credit cards required - Full Free Trial
- ✓ Payroll, business payments, benefits & more
- ✓ Get started in just a few minutes

REGISTER AND JOIN NOW

TEST USING A FULL DEMO ACCOUNT



**LESSON:** Please take a moment to watch this short video, an introduction to **PaymentEvolution**: <https://youtu.be/kzgayY5cnls>





# Setting Up PaymentEvolution

## Company Setup

- Once your **PaymentEvolution** account has been created, you'll need to set-up the account. Begin by selecting the type of industry your business is:

Initial Setting Wizard

Company Set Up | Payroll Profile Setup | Bank Set Up | Finish

Industry:

This information can be modified at any time by going to Company Profile from Settings Menu

CANCEL NEXT

- Since Divine Chocolates offers food services, via catering and the like, we'll select **Mobile Food Services**. Click **Next**.

Initial Setting Wizard

Company Set Up | Payroll Profile Setup | Bank Set Up | Finish

Industry:

This information can be modified at any time by going to Company Profile from Settings Menu

CANCEL NEXT

## Payroll Profile Setup

- Select a **pay period frequency**, weekly, bi-monthly, quarterly etc. Divine Chocolates will pay their employees weekly. *Select: Weekly*
- Confirm the province your employees are doing business. Divine Chocolates is in Ontario.
- When Christina registered her new business with the Canada Revenue Agency she was given an HST (Harmonized Sales Tax) number for payment and reporting information. The CRA also required that she make remittance payments on a monthly basis. Select **Monthly** in the '**How often do you remit to the CRA**' box. This will be different for all businesses.
- Add the 15-digit GST/HST number issued by the Canada Revenue Agency in the **Payroll Number** box. For sake of this course, please enter a fictitious number like 999 999 999 RE0001.
- Enter the **current payroll year** you're working in, select 2018.
- Lastly, chose the date you'll process your first payroll run. Divine Chocolates will process their first run on April 13, 2018. Click **Next**.

The screenshot shows the 'Initial Setting Wizard' window with the 'Payroll Profile Setup' step selected. The form contains the following fields and values:

- Company Set Up:  (Completed)
- Payroll Profile Setup:  (Active)
- Bank Set Up:  (Not started)
- Finish:  (Not started)

Form fields and values:

- Please select your default pay frequency: 52 - Weekly
- What is your province of employment?: Ontario
- How often do you remit to the CRA?: Monthly
- Please enter your CRA Payroll Number: 999 999 998 RP0001
- What is your current payroll year?: 2018
- What is the start date of your first pay run with PaymentEvolution: 13-Apr-2018

Buttons: CANCEL, NEXT

## Bank Setup

- **Select a bank** you've currently setup to handle your business affairs from the drop-down list provided. Divine Chocolates has established an account with the Royal Bank of Canada. Enter a fictitious transit 06119 for example (5 digits) and account number 0119384 (7 digits)



**NOTE:** Students: **Do not** enter any personal banking information.

Initial Setting Wizard

Company Set Up ✓ Payroll Profile Setup ✓ Bank Set Up Finish

Please provide the following bank details to continue

Bank Name: ROYAL BANK OF CANA

Transit Number: 06119

Account Number: 0119384

View Sample Cheque

CANCEL NEXT

The initial set up is complete. Click **Finish**. Divine Chocolates will need to add the employees Christina has hired to process payroll.

Initial Setting Wizard

Company Set Up ✓ Payroll Profile Setup ✓ Bank Set Up ✓ Finish

Welcome to PaymentEvolution Payroll!

Thank you, your organization has been set up for payroll.

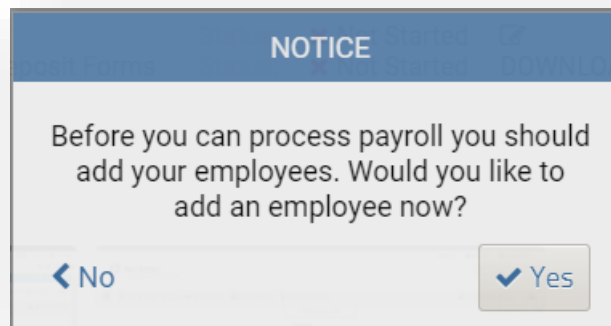
Some tips on getting started

- 1 [Company profile](#) - complete your account profile.
- 2 [Add your employees](#) and how they get paid.
- 3 [Process your first payroll](#) - it will only take a few minutes.

Video overview

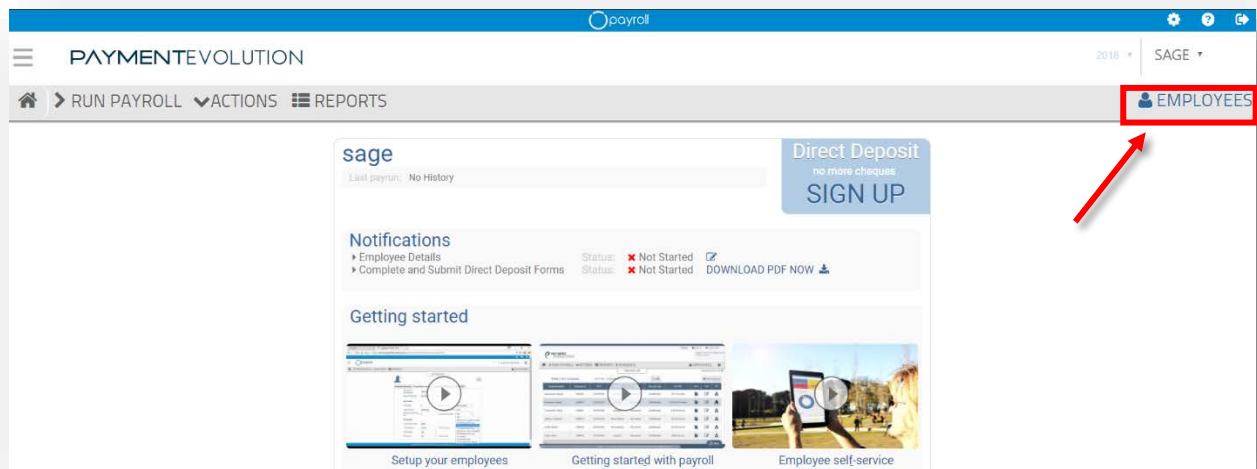
CANCEL FINISH

Otherwise when signing on the next time, a notification will appear that employees need to be added before you can run payroll:

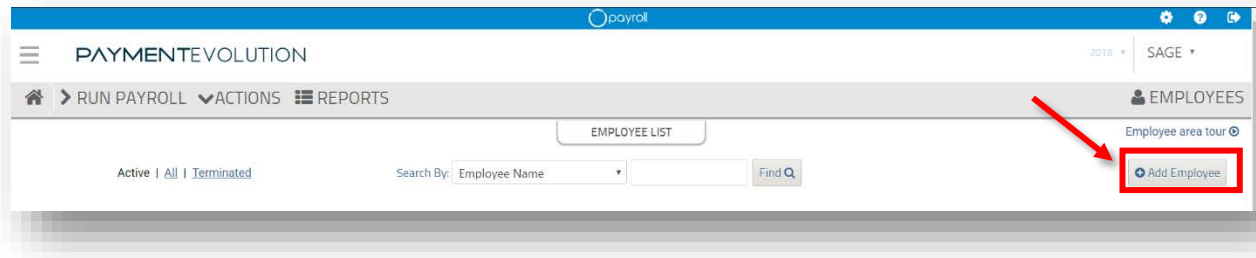


## Adding Employees

- From the home screen click **EMPLOYEES**:



- Click **Add Employee**



- Begin adding all pertinent employee info. Add **Ryan Wilson** as Divine Chocolates first employee. You **must** add a SIN # and employee bank and account number to save the record.
  - Use **251 347 639** as Mr. Wilson's Social insurance number. This is a test number only. To generate other test numbers to be used during your course go to: <https://www.fakenamegenerator.com/social-insurance-number.php> A number will be automatically generated, which you'll be asked to validate.
  - Input a fictitious **Branch number (46337)** and **Account number (0293)**.

EDIT EMPLOYEE

Save

Personal Information Payroll Details and Rules Benefits Deductions Financial YTD

Employee Information:

\*First Name: Ryan Middle Name:

\*Last Name: Wilson

\*SIN (9 digits): 04\* \*\*9 \*\*2 [Edit Validate SIN](#)

\*Date of Birth: 01/01/1985 (dd/mm/yyyy)

\*Date of Hire: 13/03/2018 (dd/mm/yyyy)

Employee Type: Permanent ▼ Position: Candy Maker

Notes:

Employee Access

Security Type: Employee ▼ [UPGRADE](#)

Employee Number:

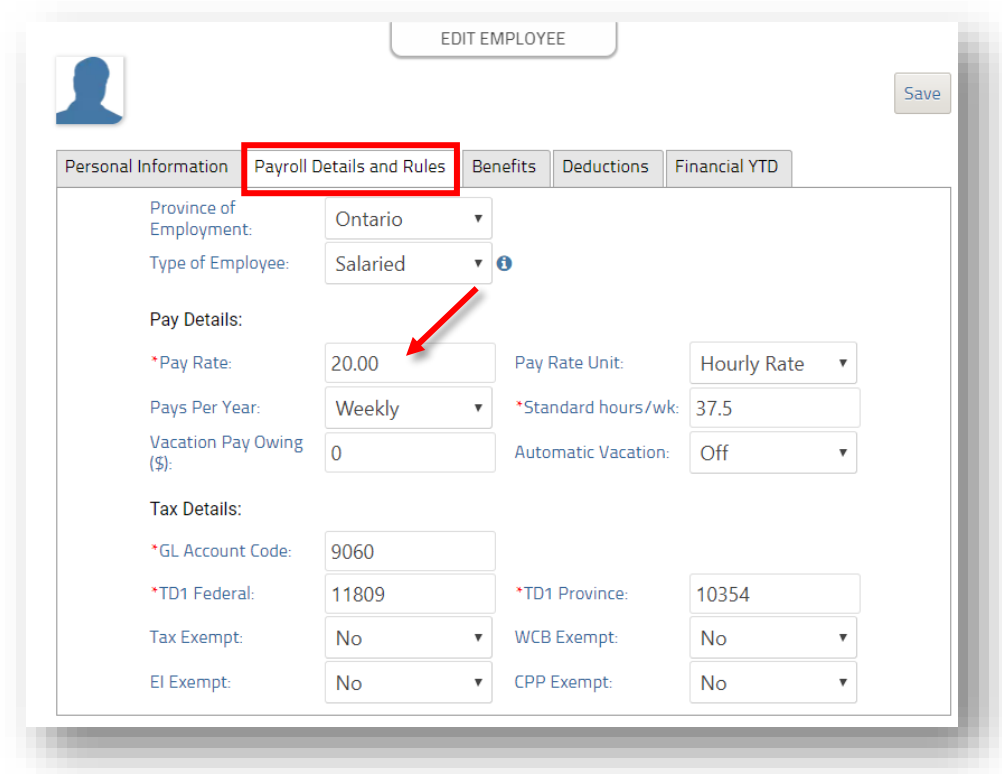
Password:

Confirm Password:

[Employee e-paystubs](#)  
[paychequer.com](#)

payChequer

- Click on **Payroll Details and Rules** tab. Add Mr. Wilson's wage rate of 20\$/per hour, GL code for payroll, etc.



EDIT EMPLOYEE

Save

Personal Information Payroll Details and Rules Benefits Deductions Financial YTD

Province of Employment: Ontario

Type of Employee: Salaried

Pay Details:

\*Pay Rate: 20.00 Pay Rate Unit: Hourly Rate

Pays Per Year: Weekly \*Standard hours/wk: 37.5

Vacation Pay Owning (\$): 0 Automatic Vacation: Off

Tax Details:

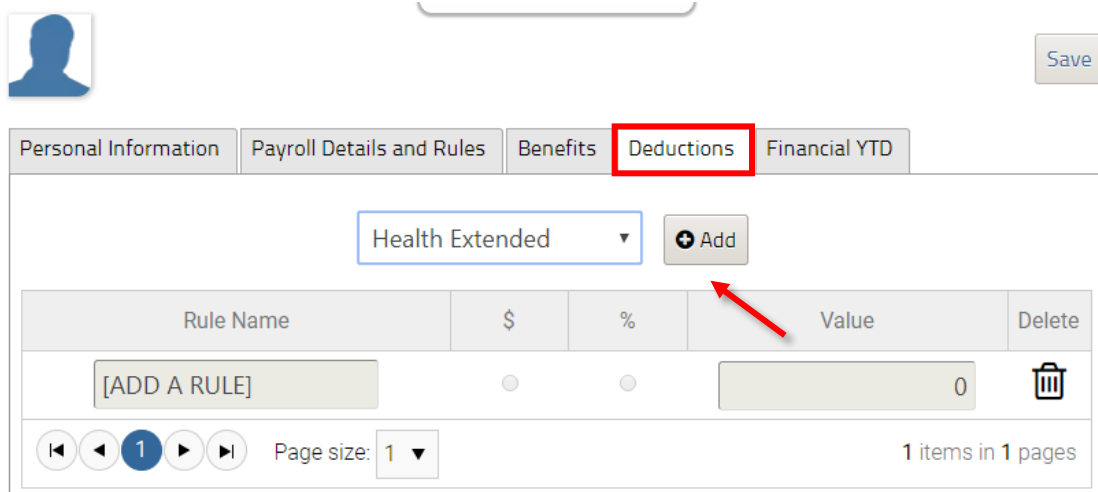
\*GL Account Code: 9060

\*TD1 Federal: 11809 \*TD1 Province: 10354

Tax Exempt: No WCB Exempt: No

EI Exempt: No CPP Exempt: No

- All employees of Divine Chocolates receive health and dental insurance. We'll need to add the employee deductions to Ryan Wilson's record file. Click on the **Deductions** tab:



Save

Personal Information Payroll Details and Rules Benefits Deductions Financial YTD

Health Extended Add

Rule Name	\$	%	Value	Delete
[ADD A RULE]	•	•	0	🗑️

Page size: 1 1 items in 1 pages

- Begin by adding the health deduction. From the drop-down menu, select **Health Extended** and then click **Add**.

- Once the deduction appears in the line item below, select whether it's a percentage or flat dollar amount. In this case, Ryan Wilson's contribution to his health insurance is 22.40\$ every pay period. Enter 22.30\$ in the **Value** column.
- We'll do the same for his Dental insurance contribution. Select **Dental** from the drop-down menu above and input his pay period contribution of 5.60\$.

Personal Information Payroll Details and Rules Benefits Deductions Financial YTD

Life Insurance

Rule Name	\$	%	Value	Delete
Health Extended	<input type="radio"/>	<input type="radio"/>	22.40	<input type="button" value="Delete"/>
Dental	<input type="radio"/>	<input type="radio"/>	5.60	<input type="button" value="Delete"/>

Page size: 1 2 items in 1 pages

- Lastly, to view or modify Mr. Wilson's hours, earning, deductions and a summary, click on the **Financial YTD**.

Personal Information Payroll Details and Rules Benefits Deductions Financial YTD

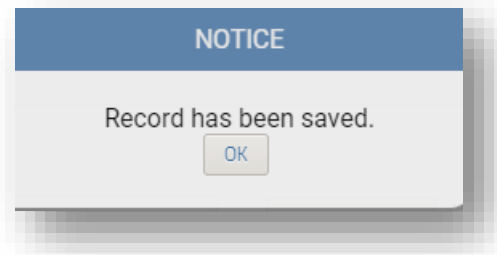
HOURS		OTHER DEDUCTIONS	
Regular Hours	0.00	Company Pension Plan	0.00
Overtime Hours @ 1.5	0.00	Extra Income Tax	0.00
Doubletime Hours @ 2	0.00	Cont. to a RRSP	0.00
Other Hours worked	0.00		

EARNINGS		STATUTORY DEDUCTIONS	
Regular Earnings	0.00	Federal Tax	0.00
Overtime Earnings	0.00	Provincial Tax	0.00
Doubletime Earnings	0.00	EI	0.00
Other Hrly Earnings	0.00	Canada Pension Plan	0.00
Statutory Holiday	0.00	Quebec Pension Plan	0.00
Sick day	0.00	Quebec QPIP	0.00
Personal day	0.00		
Shift Premium	0.00		
Other Earnings	0.00		
Other Non-Taxable	0.00		
Vacation	0.00		
Commission	0.00		
Business Expenses	0.00		

SUMMARY	
Insurable Earnings	0.00
Vacation Balance	0.00
Total Taxable Gross	0.00
Total(Non-Taxable)	0.00



Once done, click **Save!** You've just added your first employee. Mr. Wilsons record now appears as a line item on the dashboard.



The screenshot shows the 'EMPLOYEE LIST' table in the PAYMENTEVOLUTION software. The table has the following columns: Employee Name, Employee #, DOB, Pay Type, Type, Pays Per Year, Pay Rate, View, Edit, and T/R. The first row contains the data for Ryan Wilson.

Employee Name	Employee #	DOB	Pay Type	Type	Pays Per Year	Pay Rate	View	Edit	T/R
Wilson, Ryan	000001	01/01/1985	Salaried	Permanent	52 Weekly	\$20.00 Hourly			



## Lesson

Divine Chocolates has two employees. We've just added the first, Ryan Wilson to payroll. Now add the second employee, Trista Sullivan. She will manage Accounting in Christina's absence and have additional responsibilities. She will be paid 25\$ per hour. Generate a fictitious SIN number and bank account and click save once done.

## Running Payroll

It's Friday and it's time for Christina to generate her first payroll run for her employees. Navigate to **PaymentEvolution:**

- Click **Run Payroll** from the menu bar at the top. Be sure to select the correct **Pay Cycle**, in this case, Divine Chocolates runs **Weekly**.

PAYMENTEVOLUTION 2018 SAGE

EMPLOYEES

WIPROLL STEP: **RUN PAYROLL** ACTIONS REPORTS

SELECT PAY CYCLE SALARIES TIMESHEETS CALCULATE REVIEW PAYMENTS SUMMARY

Payment date: 13-Apr-2018

Payroll Type: Regular Special

Pay cycle: 52 - Weekly From: 13-Apr-2018 To: 13-Apr-2018

Submit

- If all employee information is correct, put a check mark in the box for each employee approval and click **Approve**.

PAYMENTEVOLUTION 2018 SAGE

EMPLOYEES

WIPROLL STEP: **SALARIES** ACTIONS REPORTS

SELECT PAY CYCLE SALARIES TIMESHEETS CALCULATE REVIEW PAYMENTS SUMMARY

APPROVE SAVE DELETE

Name or ID: SEARCH

	#	Employee Name	ID	Earnings Type	Hours	Rate	Total	Save	Add
<input checked="" type="checkbox"/>	1	Wilson, Ryan	000001	Regular Hours	37.50	20.00	\$750.00		

Page size: 15

Total Gross Approved: \$0.00 for 0 employees | Legend: Approved

- Click **Calculate** to calculate deductions and see employee net payment:

ESHEETS CALCULATE **REVIEW** PAYMENTS SUMMARY

Employee: -ALL EMPLOYEES- VIEW JOURNAL

Employee	ID	Total Hours	Total Gross	Total Deductions	Net Pay
<a href="#">Wilson, Ryan</a>	000001	37.50	750.00	148.43	601.57

- **Payment Journals** can be viewed here as well by clicking **View Journal**:

PaymentEvolution 2.1.0 sage 13/04/2018 1:19:23 PM  
**PAYROLL JOURNAL** Pay Period # 0 From 13/04/2018 To 13/04/2018 Page 1 of 1


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Employee Number	000001	Total
Last Name	WILSON	
First Name	RYAN	
Basic Pay Rate	\$20.00	
== HOURS ==		
Regular Hours	37.5	37.5
Total Hours	37.5	37.5
== EARNINGS ==		
Regular Earnings	\$750.00	\$750.00
Total Earnings	\$750.00	\$750.00
== DEDUCTIONS ==		
Federal Tax	\$68.05	\$68.05
Provincial Tax	\$34.14	\$34.14
EI	\$12.45	\$12.45
Canada Pension Plan	\$33.79	\$33.79
Total Deductions	\$148.43	\$148.43
Insurable Earnings	\$750.00	\$750.00
Total Taxable Income	\$750.00	\$750.00
Net Pay	\$601.57	\$601.57
== OTHER ==		
Vacation Earned	\$0.00	\$0.00

- Electronic payments must be set for the **next** business day. Be sure to adjust the date accordingly. Direct Deposit requires a form to be filled out for purposes of this course, we'll select **cheque** as the payroll payment type from within the drop-down menu. To finish this payroll, click on **Payments**, scroll to the bottom and click **Finish This Pay Run**:

CALCULATE REVIEW **PAYMENTS** SUMMARY

**1** Payment Details

Select Processing / Cheque Date: 13-Apr-2018 

Starting Payment/Cheque Number: 000001

**2** Confirm payments

Employee Payments:

No.	Name	Payment Type	Net Pay	Slip No
000001	<a href="#">Wilson, Ryan</a>	Bank ▼	\$601.57	000001


**1**

Gross wages \$750.00  
Net \$601.57

**Employee Deductions:**  
Statutory \$148.43

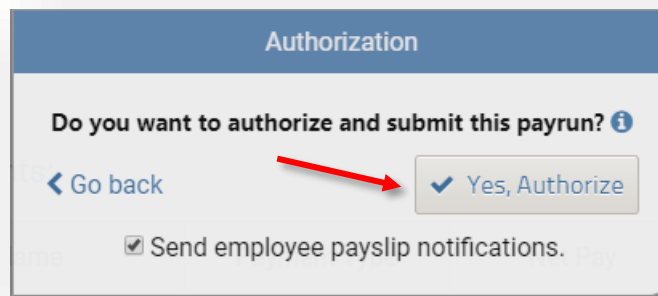
**Employer Contributions:**  
EI \$17.43  
CPP \$33.79

**Total (estimated) \$801.22**

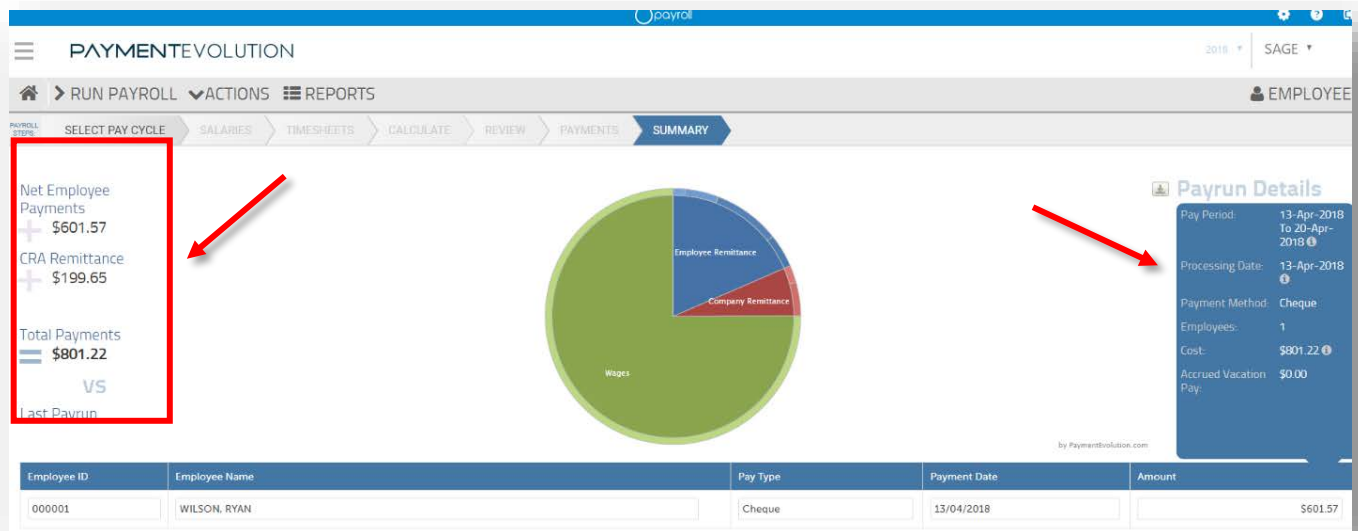
**3** Enable Optional PIN Security 

[Finish this payrun >](#)

- Divine Chocolates will be asked to authorize and submit the pay run. By clicking, **Yes, Authorize** the employee will receive a payslip notification:




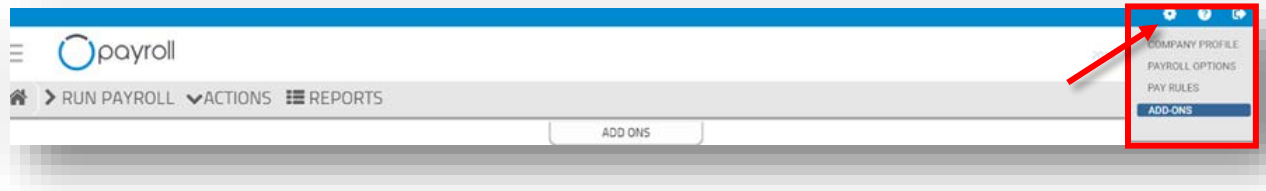
- Divine Chocolates has completed its first pay run. Ryan Wilson's info now appears in summary form on the **PaymentEvolution** summary screen:



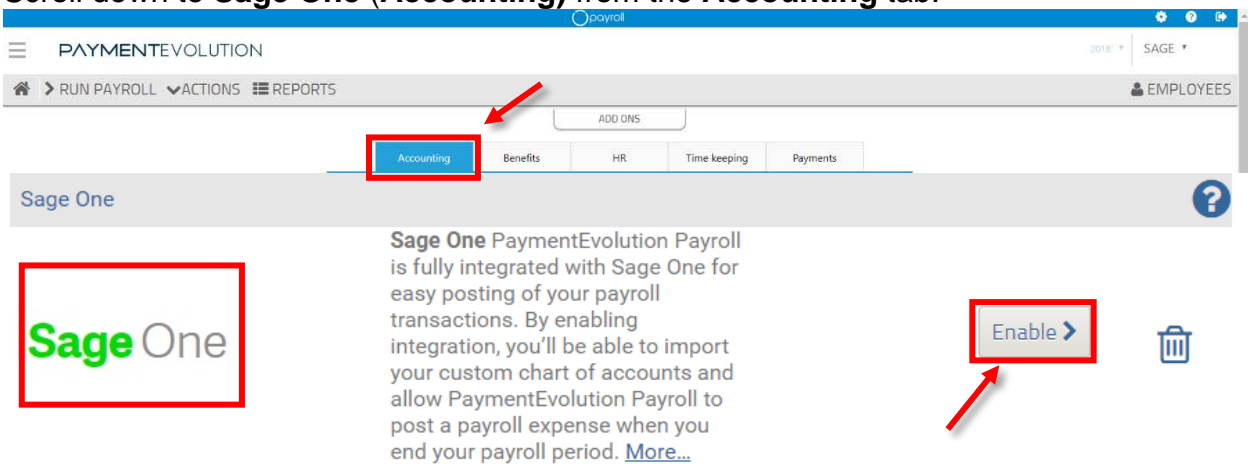
## Integrating Accounting and Payment Evolution

We've just created a PaymentEvolution account for Christina to run Payroll. Now we need to integrate **PaymentEvolution** with **Accounting**.

- From within **PaymentEvolution**, navigate to the wheel  in the top right-hand corner and click **Add-Ons**.



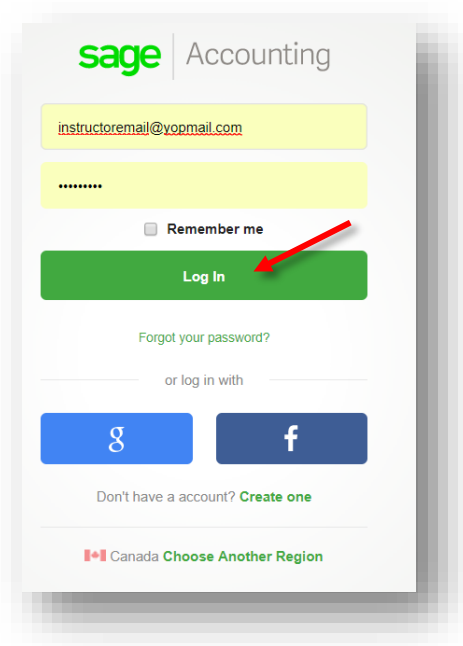
- Scroll down to **Sage One (Accounting)** from the **Accounting** tab:



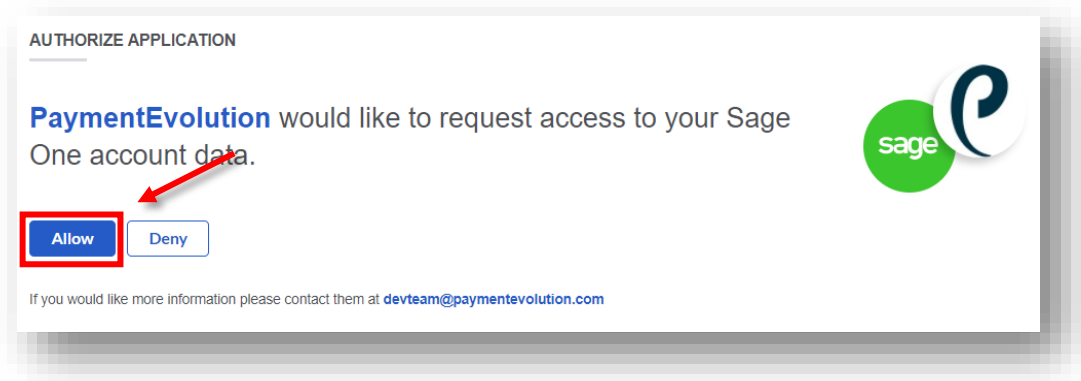
- Click **Enable**
- Accounting** will launch a country selection. Since Divine Chocolates is located in Canada, select **Canada**.



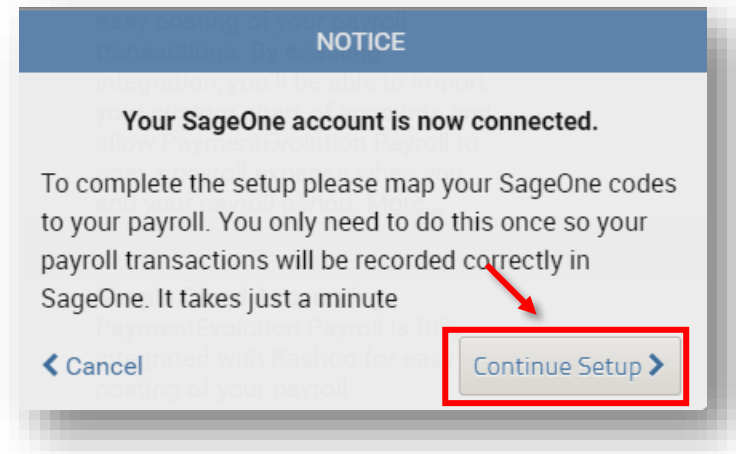
- From the sign in screen, enter your Sage **user name** and **password** and click **Log In**:



- A notification will appear that **PaymentEvolution** would like to access your Accounting data. To integrate click **Allow**:



- Once connected, **PaymentEvolution** will display the following notification:



- Click **Continue Setup**
- Divine Chocolates will map their GL codes and click **Save**:

PAYROLL OPTIONS

System Options **G/L** Cheque Layout Payroll Security Save

Use GIF Codes

Your Sage One accounts have been imported. You'll see the default mapping below. Use the dropdown boxes to make any adjustments and click the SAVE button when complete


**Sage One**

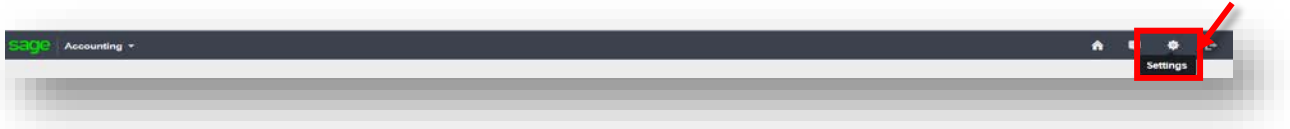
ASSETS	EXISTING	Debit	Credit
Bank	1002	Chequing (1050)	
<b>LIABILITIES</b>			
Payroll Clearing	2624		<no mapping>
Federal Tax	2628		Federal Income Tax Payabl
Provincial Tax	2628		<no mapping>
EI	2627		EI Payable (2180)
Co Portion EI	2627		EI Payable (2180)
Canada Pension Plan	2627		CPP Payable (2185)

A red box highlights the dropdown menu for the 'Payroll Clearing' liability, and a red arrow points to it from the right.

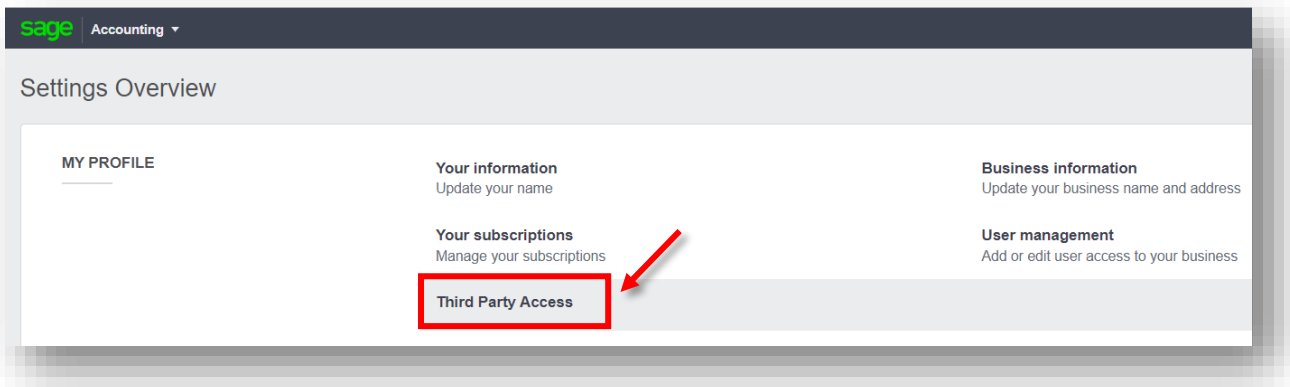


# Confirmation of Integration

- To confirm your **Accounting** account has been successfully integrated with **PaymentEvolution**, sign in to **Accounting**. From the menu bar, navigate to the settings wheel: 



- From **Settings Overview**, select **Third Party Access**:



- PaymentEvolution** will appear in your list of integrations:



# Payroll Reports

**PaymentEvolution** provides a graphical view of all reports within **Accountant Reports** section.

- Click anywhere on the graph to go explore in further detail and based on the chosen time period.
- Click any category of reports to view specific reports about the student company.

### Accountant Reports

**Account Listing**

Provides the name, type, and balance for each account listed in your Chart of Accounts.

Run | Customize

**Trial Balance**

This report summarizes the debit and credit balances of each account on your chart of accounts during a period of time.

Run | Customize

**Journal**

This report breaks down every transaction during a period of time into debits and credits and displays them chronologically. Transaction List by Date also lists transactions chronologically, but not as debits and credits.

Run | Customize

**Profit & Loss**

Shows money you earned (income) and money you spent (expenses) so you can see how profitable you are. Also called an income statement.

Run | Customize

**Reconciliation Reports**

Lists all reconciliations you've completed and provides links to the individual reconciliation reports.

Run

**Adjusted Trial Balance (Accountants Only)**

This report summarizes the debit and credit balances, including adjusting entries, of each account on your chart of accounts during a period of time.

Run | Customize

**Adjusting Journal Entries (Accountants Only)**


This is a list of journal entries during a period of time that have the "Adjusting" checkbox checked.

Run | Customize

**Profit & Loss Comparison (Accountants Only)**

Shows a year-over-year comparison of income and expenses.

Run | Customize



## Check Your Knowledge



Answer the following questions about the material covered in this lesson.

**Short Answer**

Write a short answer to the question below.

1. To confirm your **Accounting** account has been successfully integrated with **PaymentEvolution**, sign in to **Accounting**. From the menu bar, navigate to:
- 
- 

Mark the correct answer(s) to the question below.

2. As businesses grow, **Accounting** has the ability to grow with a company due to a wide variety of connected apps through \_\_\_\_\_.
  - A. \_\_\_\_\_ iTunes
  - B. \_\_\_\_\_ Google Play
  - C. \_\_\_\_\_ Facebook
  - D. \_\_\_\_\_ Sage Marketplace
3. Features of PaymentEvolution include:
  - A. \_\_\_\_\_ Integrates with Accounting through Sage Marketplace
  - B. \_\_\_\_\_ Offers direct deposit
  - C. \_\_\_\_\_ Cloud Payroll offering fast, precise payroll calculations
  - D. \_\_\_\_\_ Payroll that requires software to be installed to your desktop
4. After a **PaymentEvolution** account is created, the company needs to setup their account. What information is part of setting of the company payment profile:
  - A. \_\_\_\_\_ Pay Frequency; weekly, bi-monthly, quarterly, etc.
  - B. \_\_\_\_\_ End date of first pay run
  - C. \_\_\_\_\_ Province of employment and current payroll year
  - D. \_\_\_\_\_ How often the company will remit to the CRA/15-digit GST/HST number
5. Once the initial set up of **PaymentEvolution** is complete, your company will need to add \_\_\_\_\_ in order to process payroll.
  - A. \_\_\_\_\_ An order for cheques
  - B. \_\_\_\_\_ Accounts Start Date and Year End Lockdown Date
  - C. \_\_\_\_\_ Employees
  - D. \_\_\_\_\_ Previous years CRA returns

6. True or False: Enter 'T' for True or 'F' for False for each of the affirmations below.

- Industry Type is required as part of Company Setup
- You **must** add a SIN # and employee bank and account number to save the employee record within PaymentEvolution to run payroll
- Electronic payments can be set for the same business day



**End of Lesson**

**Please note:**

Every effort has been made to ensure that the information provided in this educational series is accurate, up-to-date, and complete, but no guarantee is made to that effect. URLs and additional resources 'Beyond the Classroom' are continuously changing. Because the software is customizable in a number of ways, the language used in this guide may be different from what you 'see' when you work with your company's data file(s).

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