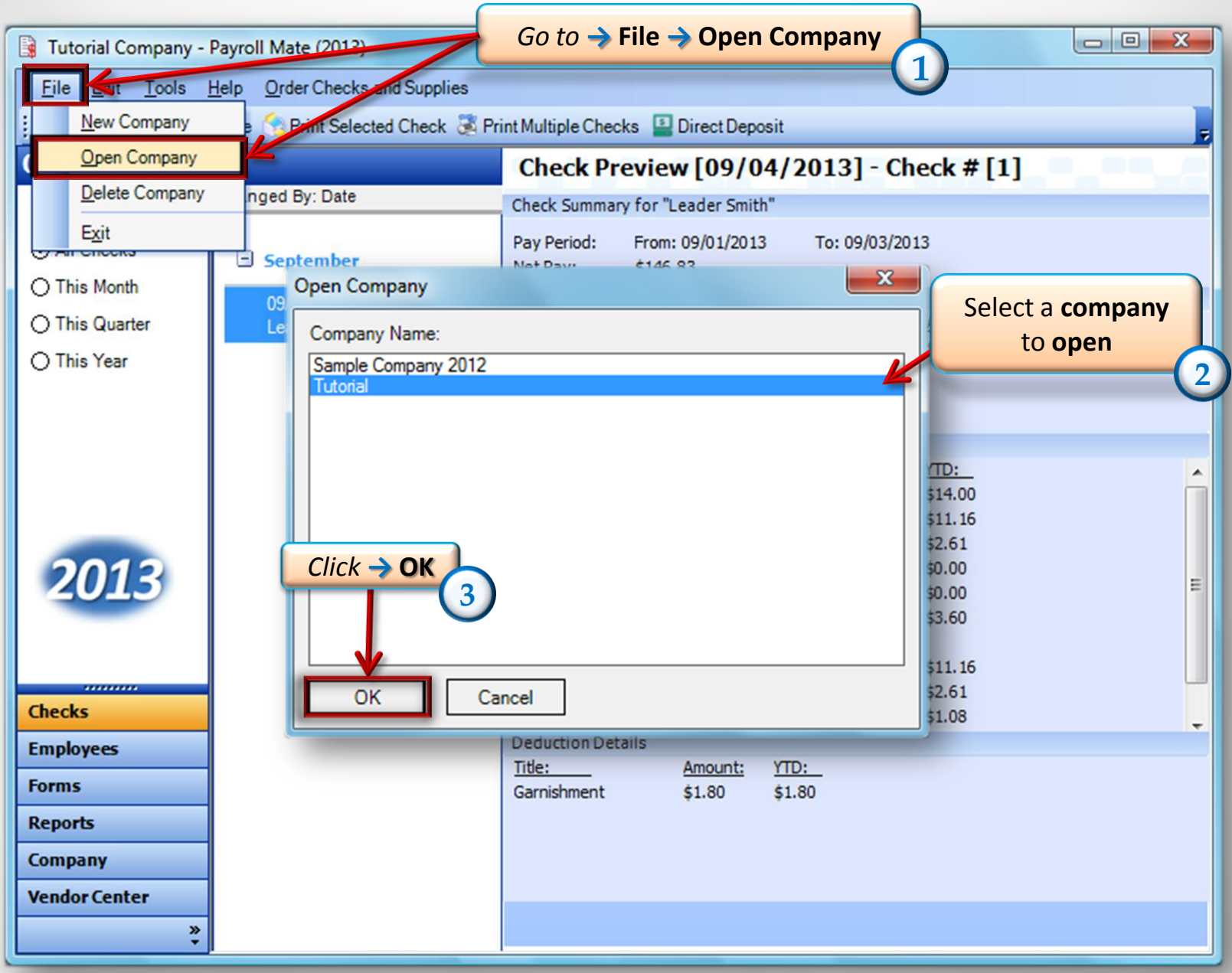
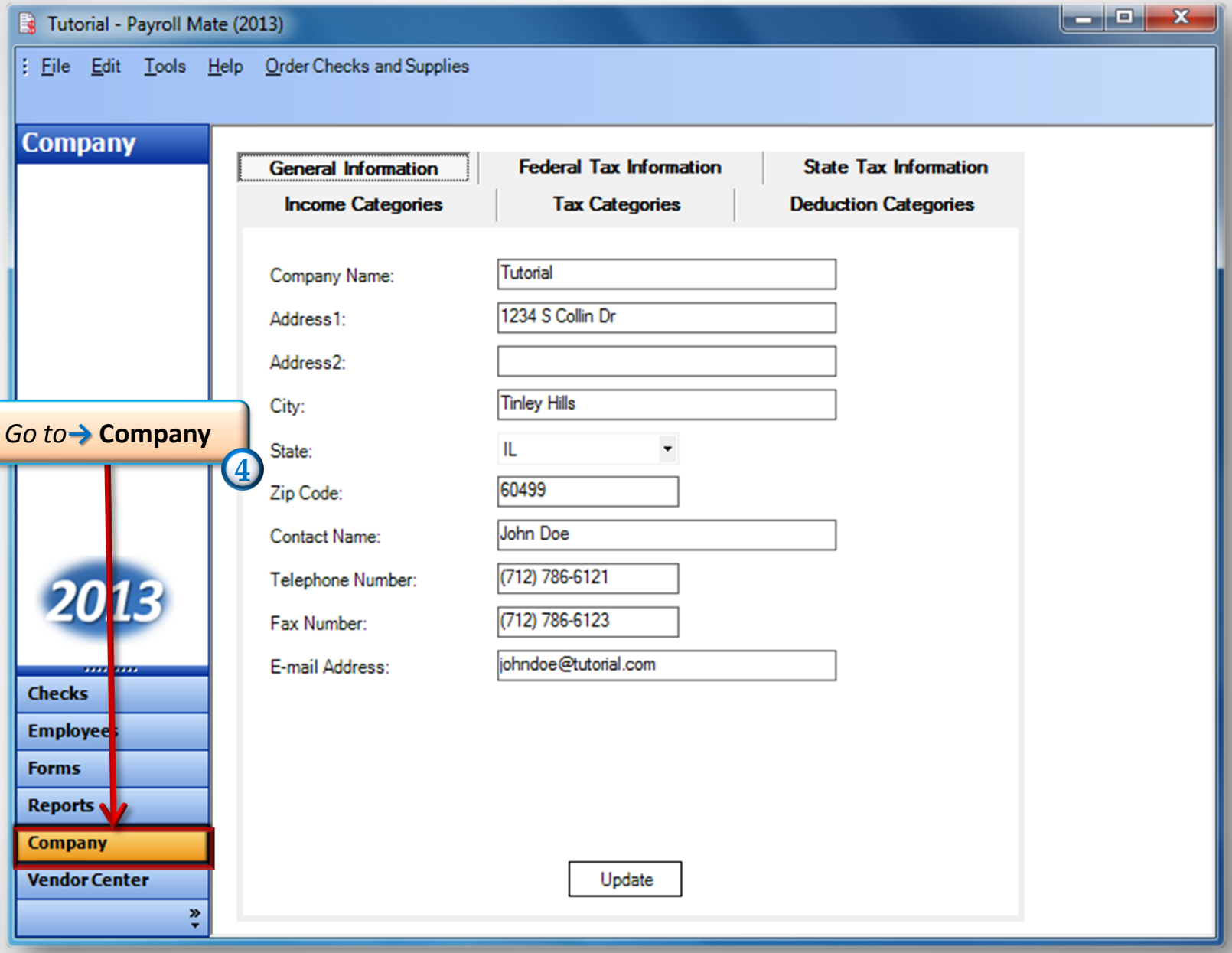
How to Create an Income Category in Payroll Mate®

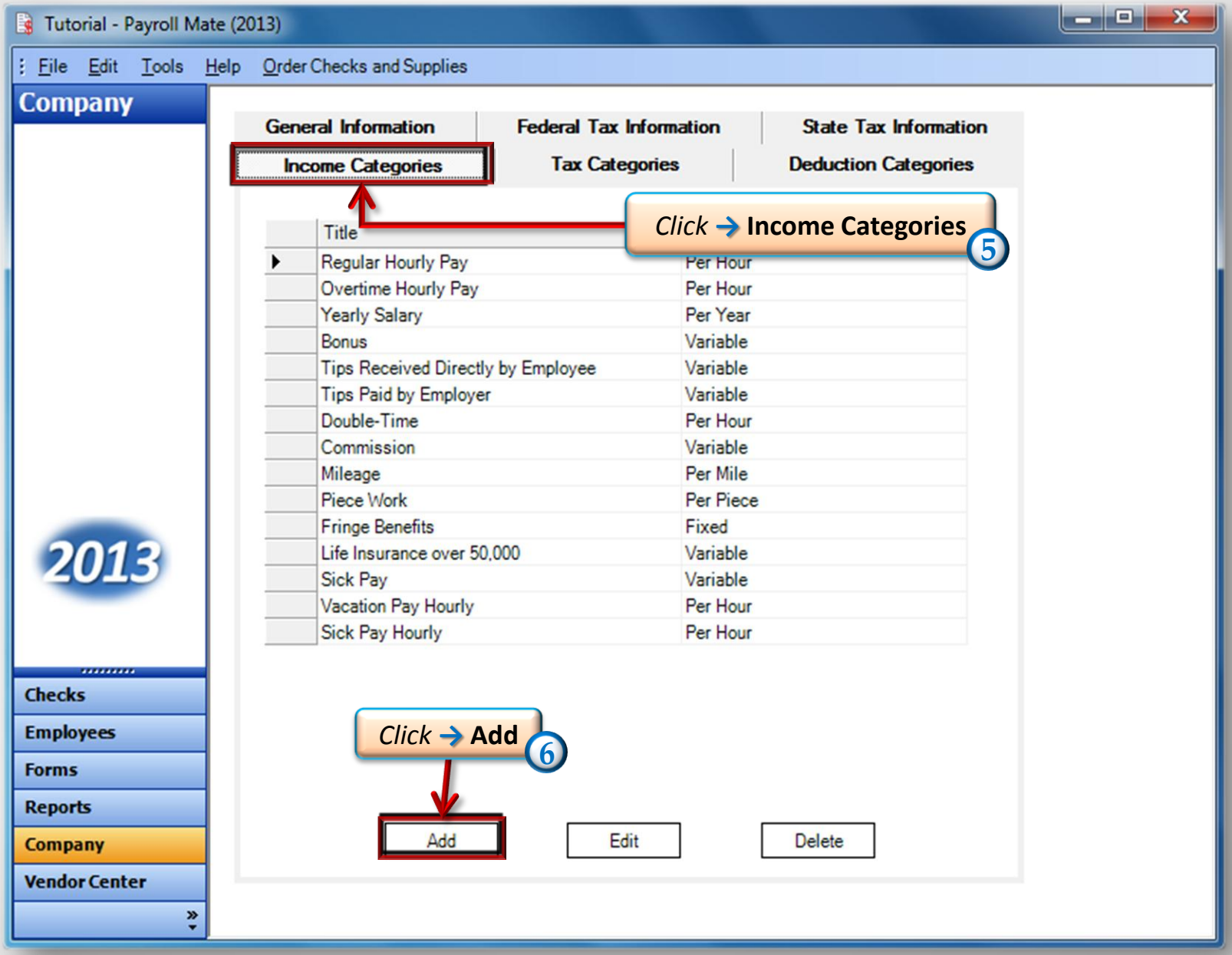
Start by Opening your

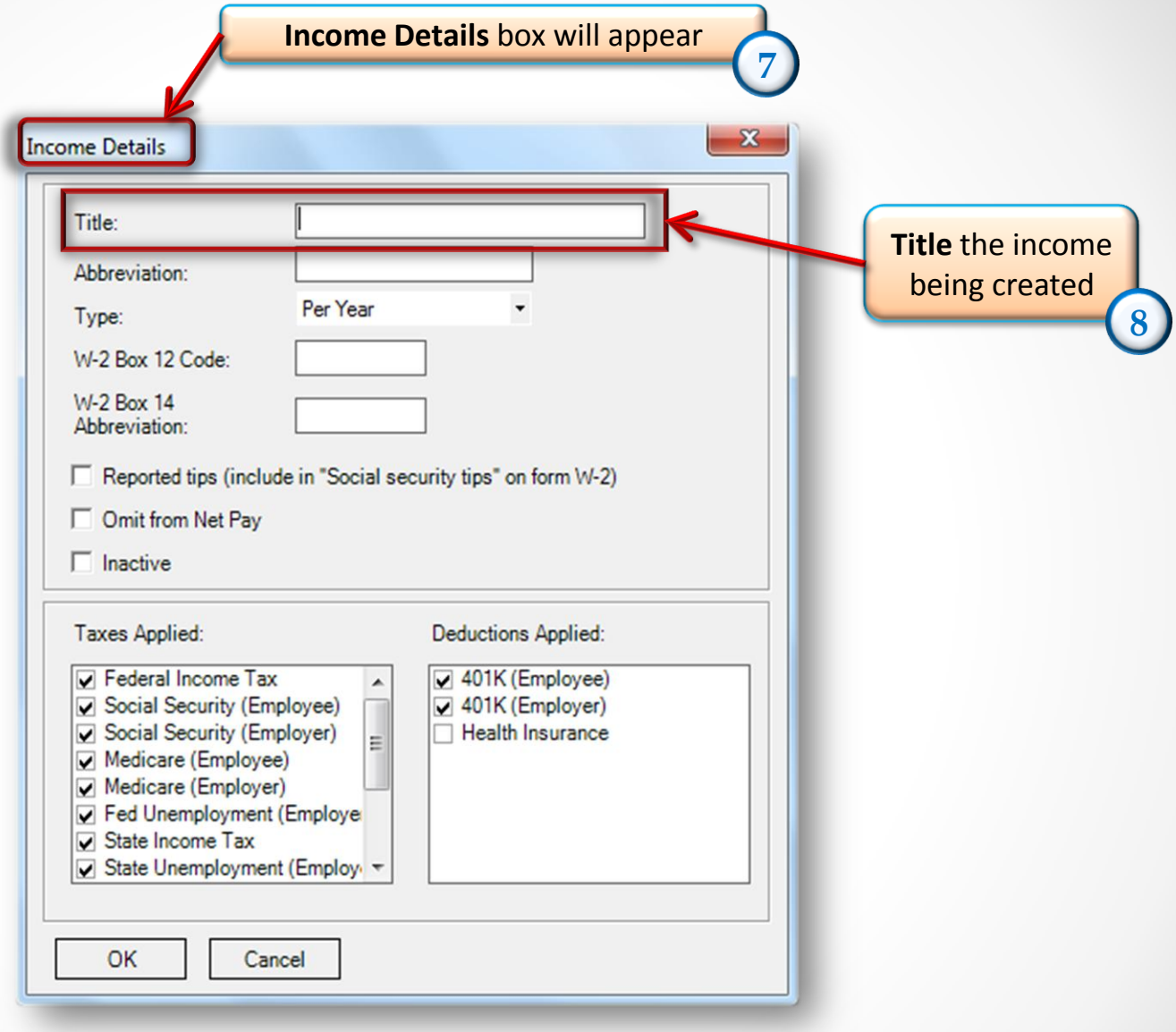
Payroll Mate

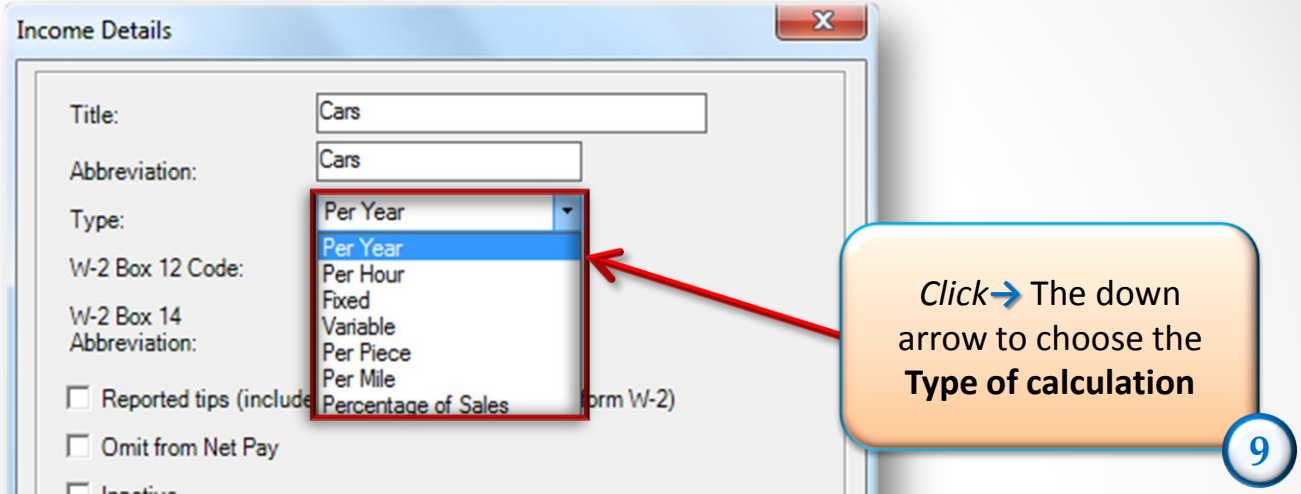
Program

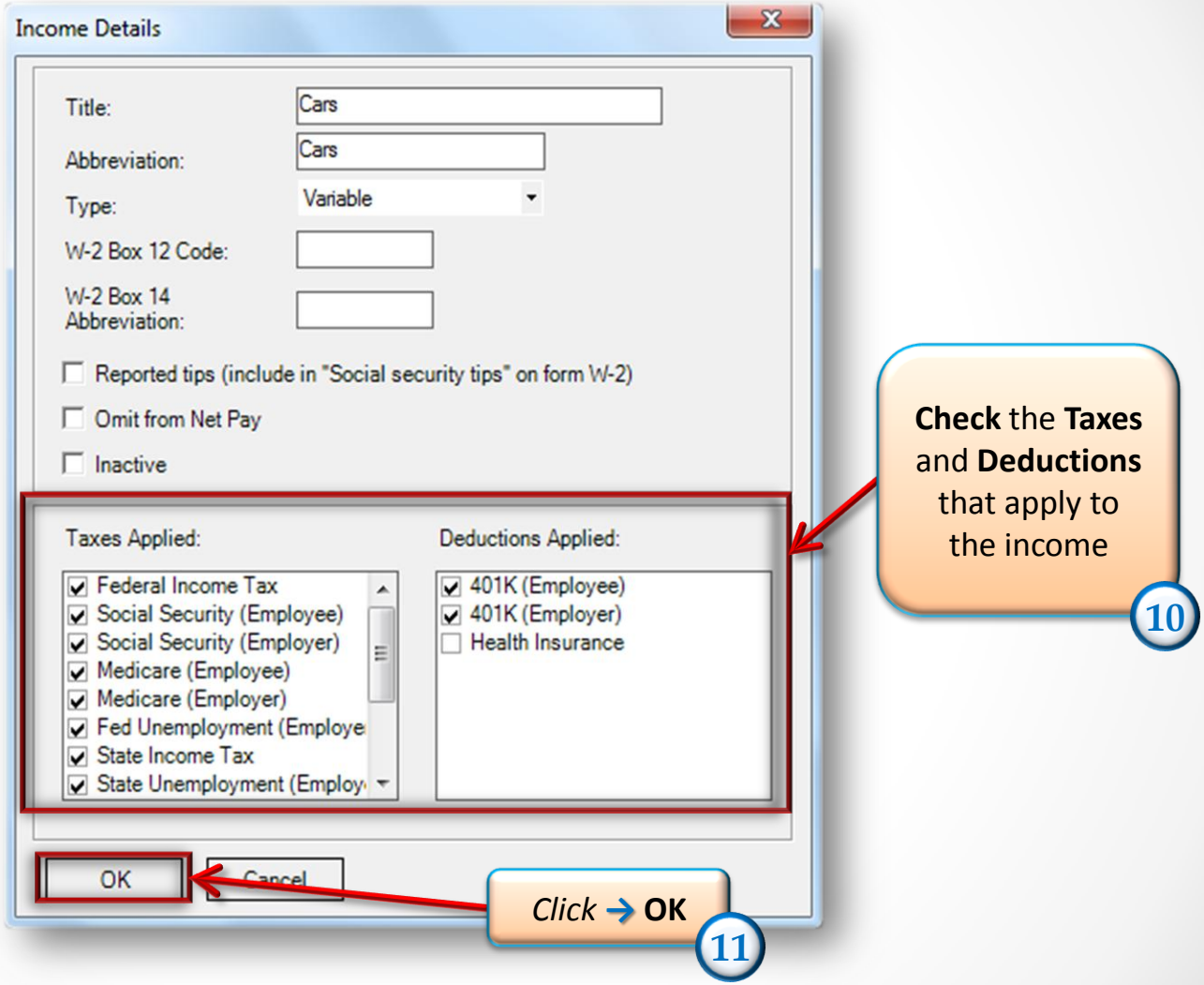

Go to → File → Open Company
1
Tutorial Company - Payroll Mate (2013)
File
Tools
Help
Order Checks and Supplies
New Company
Open Company
Delete Company
Exit
Print Selected Check
Print Multiple Checks
Direct Deposit
Check Preview [09/04/2013] - Check # [1]
Check Summary for "Leader Smith"
Pay Period: From: 09/01/2013 To: 09/03/2013
This Month
This Quarter
This Year
2013
Checks
Employees
Forms
Reports
Company
Vendor Center
Open Company
Company Name:
Sample Company 2012
Tutorial
Select a company to open
2
Click → OK
3
OK
Cancel
Deduction Details
Title:
Amount:
YTD:
Garnishment
$1.80
$1.80

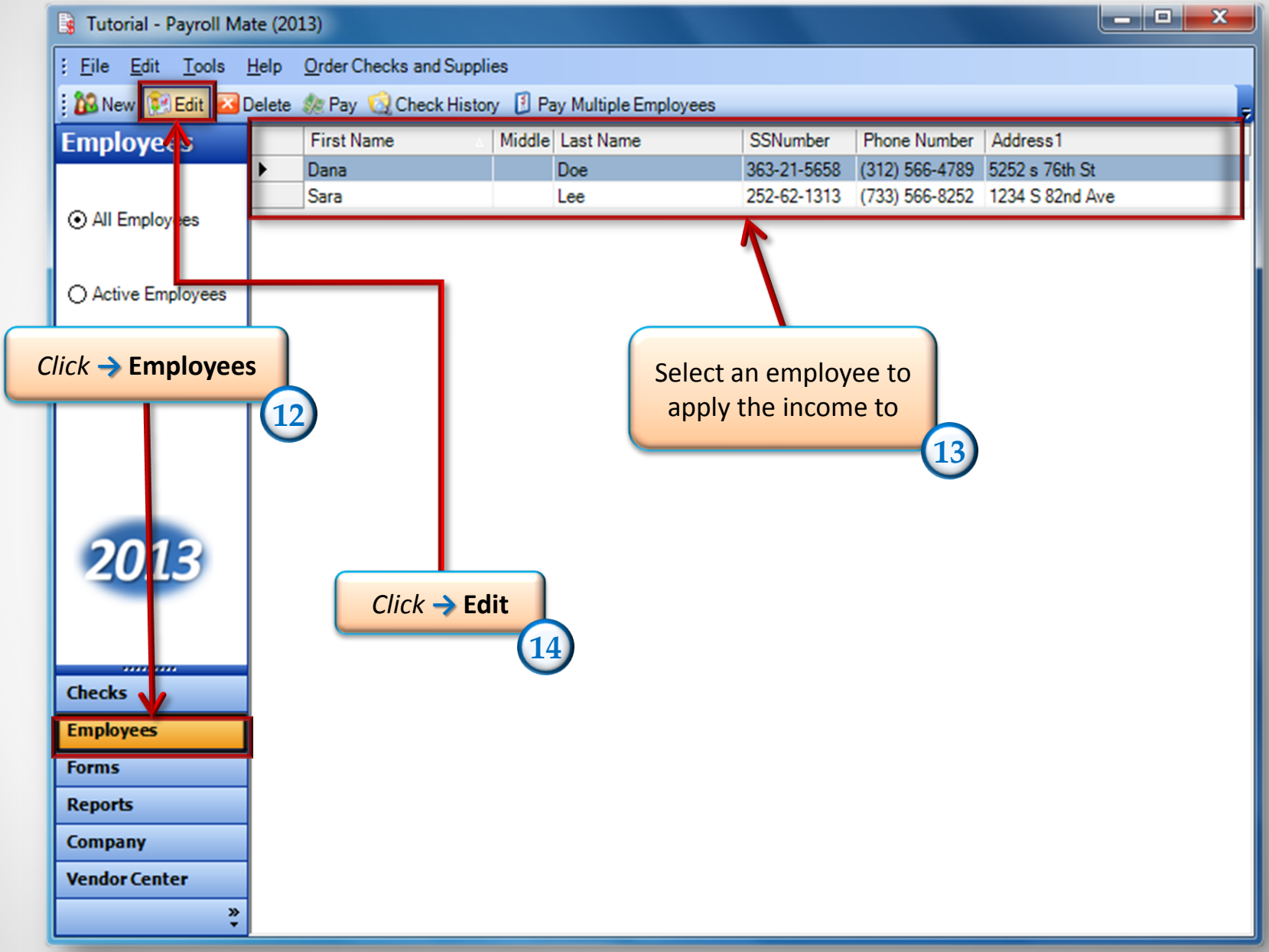

Tutorial - Payroll Mate (2013)
File Edit Tools Help Order Checks and Supplies
Company
General Information
Federal Tax Information
State Tax Information
Income Categories
Tax Categories
Deduction Categories
Company Name: Tutorial
Address1: 1234 S Collin Dr
Address2:
City: Tinley Hills
State: IL
Zip Code: 60499
Contact Name: John Doe
Telephone Number: (712) 786-6121
Fax Number: (712) 786-6123
E-mail Address: johndoe@tutorial.com
Update
Go to → Company
4
2013
Checks
Employees
Forms
Reports
Company
Vendor Center

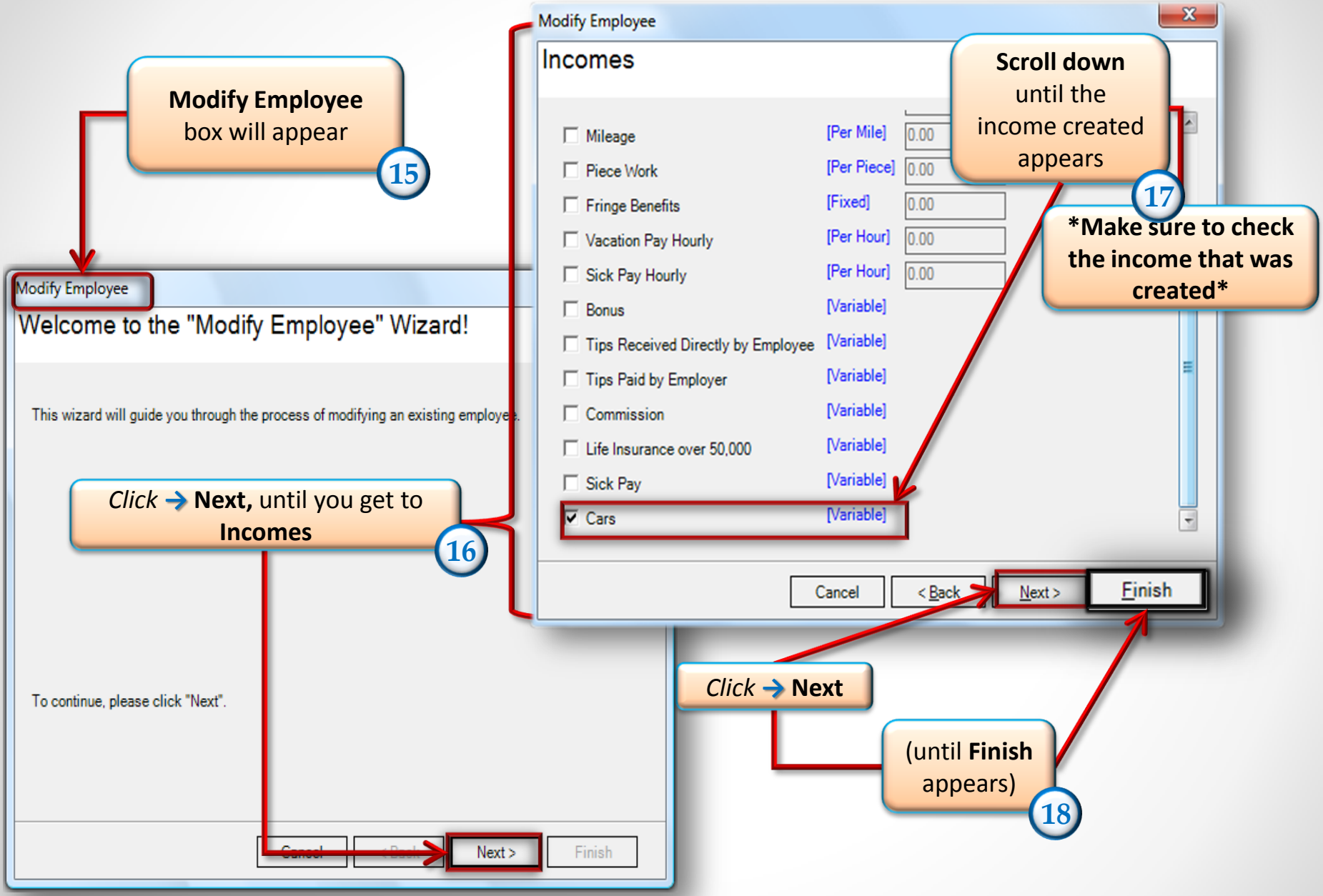

Tutorial - Payroll Mate (2013)
File Edit Tools Help Order Checks and Supplies
Company
2013
Checks
Employees
Forms
Reports
Company
Vendor Center
General Information
Federal Tax Information
State Tax Information
Income Categories
Tax Categories
Deduction Categories
Click → Income Categories
5
Title
Regular Hourly Pay Per Hour
Overtime Hourly Pay Per Hour
Yearly Salary Per Year
Bonus Variable
Tips Received Directly by Employee Variable
Tips Paid by Employer Variable
Double-Time Per Hour
Commission Variable
Mileage Per Mile
Piece Work Per Piece
Fringe Benefits Fixed
Life Insurance over 50,000 Variable
Sick Pay Variable
Vacation Pay Hourly Per Hour
Sick Pay Hourly Per Hour
Click → Add
6
Add
Edit
Delete

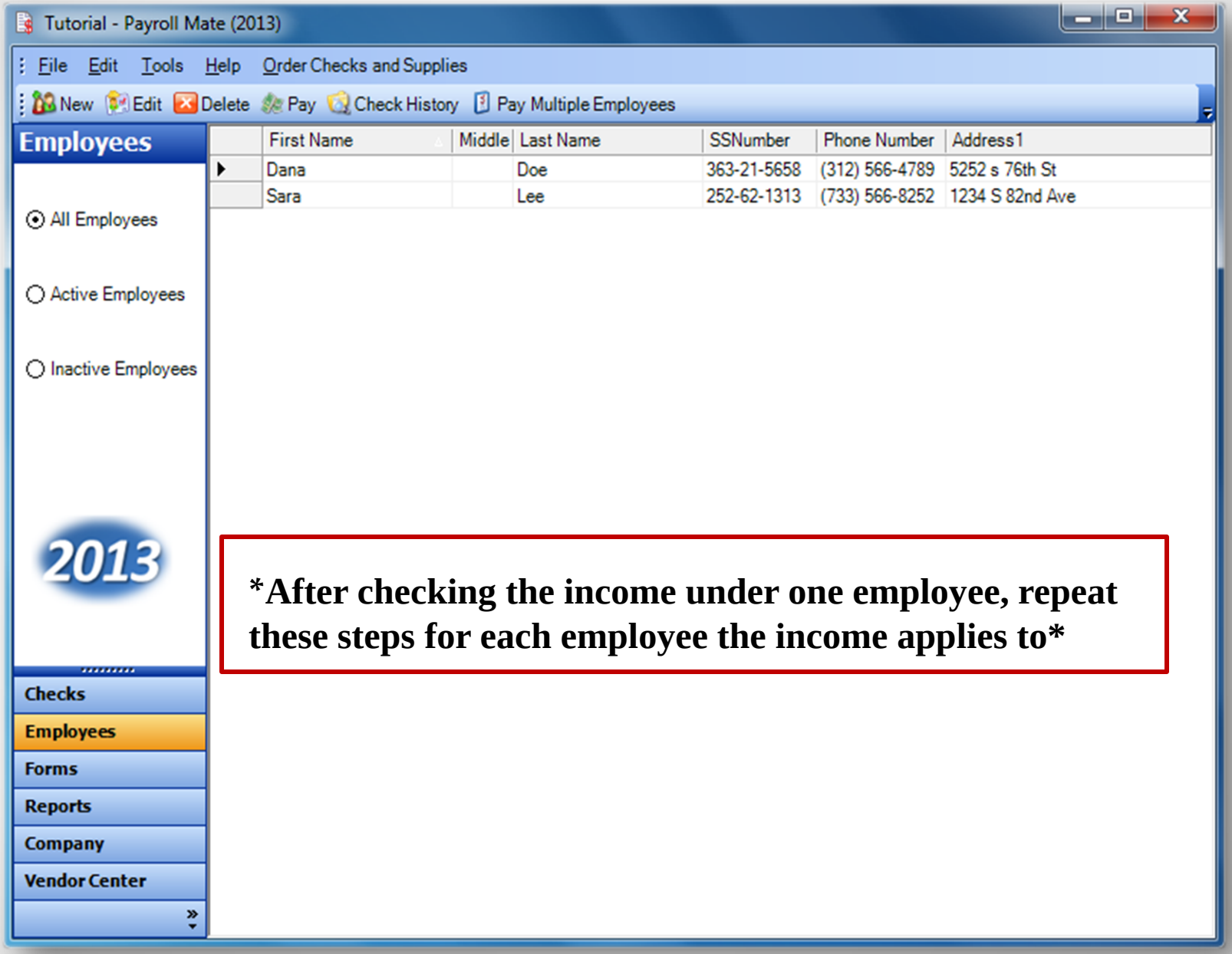

Income Details box will appear
7
Income Details
Title:
Abbreviation:
Type:
Per Year
W-2 Box 12 Code:
W-2 Box 14 Abbreviation:
Reported tips (include in "Social security tips" on form W-2)
Omit from Net Pay
Inactive
Taxes Applied:
Federal Income Tax
Social Security (Employee)
Social Security (Employer)
Medicare (Employee)
Medicare (Employer)
Fed Unemployment (Employe
State Income Tax
State Unemployment (Employ
Deductions Applied:
401K (Employee)
401K (Employer)
Health Insurance
OK
Cancel
Title the income being created
8


Income Details
Title:
Cars
Abbreviation:
Cars
Type:
Per Year
W-2 Box 12 Code:
W-2 Box 14 Abbreviation:
Per Year
Per Hour
Fixed
Variable
Per Piece
Per Mile
Percentage of Sales
Reported tips (include
orm W-2)
Omit from Net Pay
Inactive
Taxes Applied:
Federal Income Tax
Social Security (Employee)
Social Security (Employer)
Medicare (Employee)
Medicare (Employer)
Fed Unemployment (Employe
State Income Tax
State Unemployment (Employ
Deductions Applied:
401K (Employee)
401K (Employer)
Health Insurance
OK
Cancel
Click→ The down arrow to choose the Type of calculation
9


Income Details
Title:
Cars
Abbreviation:
Cars
Type:
Variable
W-2 Box 12 Code:
W-2 Box 14 Abbreviation:
Reported tips (include in "Social security tips" on form W-2)
Omit from Net Pay
Inactive
Taxes Applied:
Federal Income Tax
Social Security (Employee)
Social Security (Employer)
Medicare (Employee)
Medicare (Employer)
Fed Unemployment (Employe
State Income Tax
State Unemployment (Employ
Deductions Applied:
401K (Employee)
401K (Employer)
Health Insurance
OK
Cancel
Check the Taxes and Deductions that apply to the income
10
Click → OK
11


Tutorial - Payroll Mate (2013)
File Edit Tools Help Order Checks and Supplies
New Edit Delete Pay Check History Pay Multiple Employees
Employees
First Name Middle Last Name SSNumber Phone Number Address1
Dana Doe 363-21-5658 (312) 566-4789 5252 s 76th St
Sara Lee 252-62-1313 (733) 566-8252 1234 S 82nd Ave
All Employees
Active Employees
Click → Employees
12
Select an employee to apply the income to
13
2013
Click → Edit
14
Checks
Employees
Forms
Reports
Company
Vendor Center


Modify Employee box will appear
15
Modify Employee
Welcome to the "Modify Employee" Wizard!
This wizard will guide you through the process of modifying an existing employee.
To continue, please click "Next".
Cancel
< Back
Next >
Finish
Click → Next, until you get to Incomes
16
Modify Employee
Incomes
Mileage [Per Mile] 0.00
Piece Work [Per Piece] 0.00
Fringe Benefits [Fixed] 0.00
Vacation Pay Hourly [Per Hour] 0.00
Sick Pay Hourly [Per Hour] 0.00
Bonus [Variable]
Tips Received Directly by Employee [Variable]
Tips Paid by Employer [Variable]
Commission [Variable]
Life Insurance over 50,000 [Variable]
Sick Pay [Variable]
Cars [Variable]
Cancel
< Back
Next >
Finish
Scroll down until the income created appears
17
Make sure to check the income that was created
Click → Next
(until Finish appears)
18


Tutorial - Payroll Mate (2013)
File Edit Tools Help Order Checks and Supplies
New Edit Delete Pay Check History Pay Multiple Employees
Employees
All Employees
Active Employees
Inactive Employees
2013
Checks
Employees
Forms
Reports
Company
Vendor Center
First Name Middle Last Name SSNumber Phone Number Address1
Dana Doe 363-21-5658 (312) 566-4789 5252 s 76th St
Sara Lee 252-62-1313 (733) 566-8252 1234 S 82nd Ave
After checking the income under one employee, repeat these steps for each employee the income applies to

Congratulations. An income category has been created!

www.PayrollMate.com

1-800-507-1992