



**Integrated Payroll for  
Business Central**

# Agenda

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Feature Highlights

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What's New

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Resources

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Q&A

# Primo Payday Feature Highlights

- ▶ Built in AL (C/AL in NAV) code
  - ▶ Fully integrated with D365 Business Central
- ▶ Payroll posts directly to GL and Vendor Ledger
- ▶ Utilize Dimensions
- ▶ Post costs to Jobs or Item Ledger for Jobs Costing and Labor Costing
- ▶ Automated Tax Table Updates for US and Canada
- ▶ Automated Local Tax Settings
- ▶ Configurable vs Customized
- ▶ Online Manuals with 'Key Word Search'
- ▶ Can Outsource Federal / State tax and doc filing
  - ▶ Painless Payday Premium

# Payroll Codes - Posting Setups



Payroll WH / Deduction Setup

✓ Saved



Search + New Edit List Delete Copy... Page More options

Employee Posting Group ↑	Payroll Type ↑	Payroll Code ↑	Account Type	Account No.
ALL	Deductions	401KPLAN	G/L Account	10400
→ ALL	Deductions	403BPLAN	G/L Account	10350
ALL	Deductions	ADVANCE DEDUCTION	G/L Account	10350
ALL	Deductions	FSA	Vendor	V00010
ALL	Deductions	GARNISHMENT	Vendor	V00010
ALL	Deductions	HEALTH INSURANCE	G/L Account	13550
ALL	Deductions	HSA	Vendor	V00010
ALL	Deductions	HSA_FAM	Vendor	V00010
ALL	Deductions	SIMP_401K	Vendor	V00010
ALL	Deductions	SIMP_IRA	Vendor	V00010
ALL	Deductions	UNIFORM DEDUCTION	G/L Account	13550
ALL	Withholdings	FED WH COVID	G/L Account	20700
ALL	Withholdings	FEDERAL INCOME TAX	Vendor	V00010
ALL	Withholdings	FICA-EE - MED	Vendor	V00010
ALL	Withholdings	FICA-EE - SS	Vendor	V00010
ALL	Withholdings	STATE	Vendor	V00010

# Payroll Posts Directly to Ledger

**Dynamics 365 Business Central**

**Parks and Rec** | Posted Documents ▾ | ☰

Payroll Ledger Entries: **All** ▾ | 🔍 Search | Process ▾ | Reports ▾ | Actions ▾ | Related ▾ | Reports ▾ | Fewer options

**Views** ✕

**All** ⋮

Filter list by:

✕ Reversed

No ▾

+ Filter...

Entry No. ↓	Payroll Date Code	Document No.	Employee No.	Payroll Type	Payroll Code	Description
<u>1330</u> ⋮	2021Q3M08	PRL10061	<u>EMP10015</u>	Withholding	FICA-EE-SS	FICA - Social Security
1329	2021Q3M08	PRL10061	EMP10015	Payment	CHECK	Check
1328	2021Q3M08	PRL10061	EMP10015	Employer Tax	SUTA	State Unemployment Tax
1327	2021Q3M08	PRL10061	EMP10015	Employer Tax	SUTA	State Unemployment Tax
1326	2021Q3M08	PRL10061	EMP10015	Employer Tax	FICA-ER - SS	FICA - Social Security (Employer)
1325	2021Q3M08	PRL10061	EMP10015	Employer Tax	FICA-ER - SS	FICA - Social Security (Employer)

# Payroll Ledger Entries - GL / Vendor Ledger



Find entries

✓ Saved



**Document**

Document No. .... PRL10061

Posting Date ..... 08/28/21

Show Related Entries



Print...

More options



Related Entries	No. of Entries
→ <a href="#">G/L Entry</a> ⋮	24
Vendor Ledger Entry	8
Detailed Vendor Ledg. Entry	8
Bank Account Ledger Entry	1
Check Ledger Entry	1
Posted Payroll Header	1
Payroll Ledger Entry	16

Business Central | Full Payroll Menu > Payroll Code List > Deduction - 401KPLAN > Payroll Code Setup Card > Payroll Code Setup Card

Manage Show Attached

DEDUCTION SETTINGS ↗

**Deduction Options**

Pre/Post Tax ..... Pre-Tax ▾ Retirement Type ..... 401K ▾

Deduction Type ..... Retirement Plan ▾ Family Plan .....

OK Cancel

# Deduction Setup Wizards

NEW - PAYROLL CODE SETUP CARD



||

Payroll Code

Show more

Type	Deduction	Description	
Code	401K	Manual Input Allowed	<input type="checkbox"/>

Deduction Setup

Show more

Deduction Type	401K	Compensation Limit	0.00
Deduction Limit	18,500.00	Garnishment	<input type="checkbox"/>
Deduction Catch up Limit	24,500.00	Check Deduction/Contribution Limits ...	<input checked="" type="checkbox"/>
Total Contribution Limit	55,000.00	Use Arrears Tracking	<input type="checkbox"/>

Federal Exemptions

Exempt from Federal WH	<input checked="" type="checkbox"/>	Exempt from Social Security	<input type="checkbox"/>
Exempt from FUTA	<input type="checkbox"/>	Exempt from Medicare	<input type="checkbox"/>


State / Local Exemptions

# Deduction Setup Wizards



# Configurable vs Custom Pay Matrix - Rate Differentials

MATRIX · 1/1/2019

 Copy Detail From Pay Matrix | More options

## General

Code ..... MATRIX  Start Date ..... 1/1/2019

Description .....

Lines | Manage  

Department Code	Project Code	WORK SHIFT	Rate
→ ADM	⋮ LIL SEBASTIAN	DEERFIELD, 8 WP	15.00
ADM	MAIN ST FARMERS MKT		13.50
PROD		GUILDFORD, 10 CR	12.25
PROD		DEERFIELD, 8 WP	11.15
ADM	EAGLETON MERGER	SHIFT 1	15.00
ADM	MAIN ST FARMERS MKT	SHIFT 1	20.00

# Configurable vs Custom Advanced OT - Unique OT Settings

Advanced OT Setup ✓ Saved

SUPERVISOR · UNION A · FL

Daily Overtime Rules | Overtime Rate Overwrite Settings | More options

**Codes**

Position Code: SUPERVISOR | Union Code: UNION A  
 Position Department: | State: FL  
 Position Category: | Disable All OT Calcul...:

**General Settings** Show more

Allocate Overtime / ...:  | Use Payroll Code Lev...:   
 Use Daily Overtime / ...:  | Rounding Precision: 0.01  
 Use Consecutive Day...:  | Rounding Direction: =

**Overtime/Doubletime Multipliers**

Overtime Multiplier: 1.50 | Doubletime Multiplier: 2.00

**Overtime Settings**

Daily Overtime Rules ✓ Saved

Search + New Edit List Delete

Day of Week ↑	Overtime Floor	Doubletime Floor	Auto... Overt...	Auto... Doub...	Cons... Day OT Applies	Consecutive Day DT Floor	Number of Consecutive Days
Monday	8.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	0
Tuesday	8.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	0
Wednesday	8.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	0
Thursday	8.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	0
Friday	8.00	10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	0
Saturday	0.00	10.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0
Sunday	0.00	0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	0

# HR Features

- ▶ HR Information
- ▶ Qualifications
- ▶ Certifications

The screenshot displays a web interface for a "Payroll Employee Card" for employee "EMP10007 · Ron · Swanson". The interface includes a navigation bar with "New", "Process", "Reports", "Actions", "Related", "Reports", and "Fewer options". A dropdown menu is open under the "Employee" tab, listing several HR-related options: "HR Employee Information", "Employee Documents", "Employee Doc. Signature / Download", "Employee Dependents", "Employee Certifications", "Employee Qualifications", and "Send Onboarding Documents". The "HR Information" dropdown is highlighted with a red box. The background shows a form with fields for "No.", "First Name", "Middle Name", "Last Name", "Suffix", "Initials", "Address", "Zip Code", "City", "State", "Statutory Empl", and "Manager Payrc".

# What's New for 2022?

- ▶ Automated Local Tax Updates
- ▶ Online Manuals Moved to Support Portal
- ▶ Employee Web Portal: User Authentication Security
- ▶ Employee Web Portal: Employee Onboarding Tools
  - ▶ Upload Documents
  - ▶ Download company documents
  - ▶ Submit W4 settings through portal!

# Automated Local Tax Update

This new feature automates the local tax settings on employees based on the Resident and / or Work Address in the Payroll Employee Card depending on the payroll tax rules for the tax locality. Adds significant value to companies With employees in OH, PA, KY, IN!!

Local Tax Calculation Setup

Process Administration

Service Invocations Service Setup Initialize Automated Local Tax Clear All Generated Data

Location Dimension Code .....  
Home for Local Tax Filter .....  
School Filter .....  
New Code Notification List .....

**Payroll Code Generation**

State Template ..... STATE WH - %S%  
Local County Template ..... LOCAL WH - %S% CO  
Local City Template ..... LOCAL WH - %S% CITIES  
Local School Template ..... LOCAL TAX SD

**Administration**

Disable Local Tax Interface .....  
Disable Payload Logging .....  
Location Nos. ....

# Automated Local Tax Update

← PAYROLL EMPLOYEE CARD | WORK DATE: 4/6/2020

OK-TEST-EMP · OK Test · Employee

New Process Report More options

Work Locality	State	Starting Date	Ending Date	Payroll Type	Payroll Code	Local Tax Code	Local Tax Description

Federal Withholding Information > Single or Married Filing Separately

State Tax Information > OK

**Automated Local Tax Calculation**

Use Home Address for Local Tax

Address Info. Current

Tax Data Current

Tax Data Update Date

Tax Data Expiration Date

Expiration Date Override

Exempt from Local Tax

← LOCAL TAX SETUP | WORK DATE: 4/6/2020

Search + New Edit List Delete Refresh Local Tax Setup Local Tax Details

Type ↑	State	Starting Date ↑	Ending Date	Payroll Type	Payroll Code	Local Tax Code	Local Tax Description
→ Work Locality							

# Online Manuals Moved to Support Portal!

Knowledge base (NAV Payroll) > User Guide > Payroll Processing

explore your plan | New | Search | [Icons]

Search articles [ + New article ]

CATEGORIES AND FOLDERS	ARTICLES (22)	VIEWS	HELPFUL	NOT HELPFUL
User Guide ^	<input type="checkbox"/> Employee Card Ribbon Definitions <span>Draft</span> Created by Tammy Rives, 4 months ago	0	0	0
<input type="checkbox"/> 9 Folders	<input type="checkbox"/> ACH Prenote Published by Whit Lester, 4 months ago	7	0	0
<input checked="" type="checkbox"/> Payroll Processing	<input type="checkbox"/> Add Employee Deductions Published by Whit Lester, 4 months ago	10	0	0
<input type="checkbox"/> History	<input type="checkbox"/> Add Employee Salary Published by Tammy Rives, 4 months ago	7	0	0
<input type="checkbox"/> Periodic Activities	<input type="checkbox"/> Salary Modification Date Published by Tammy Rives, 4 months ago	1	0	0
<input type="checkbox"/> Reports	<input type="checkbox"/> Add Employee PTO Hours Published by Whit Lester, 4 months ago	2	0	0
<input type="checkbox"/> Setup	<input type="checkbox"/> Create New Employee Published by Whit Lester, 4 months ago	1	0	0
<input type="checkbox"/> Setup Groups	<input type="checkbox"/> Batch Payroll Processing Published by Whit Lester, 4 months ago	10	0	0
<input type="checkbox"/> Canada Specific	<input type="checkbox"/> Scheduled Batch Published by Whit Lester, 4 months ago	0	0	0
<input type="checkbox"/> Employee Web Portal				
<input type="checkbox"/> Error Messages & Trouble Shooting				

# Online Manuals Moved to Support Portal!

Knowledge base (NAV Payroll) > User Guide > Payroll Processing

explore your plan | New | Search | [Icons]

Search articles

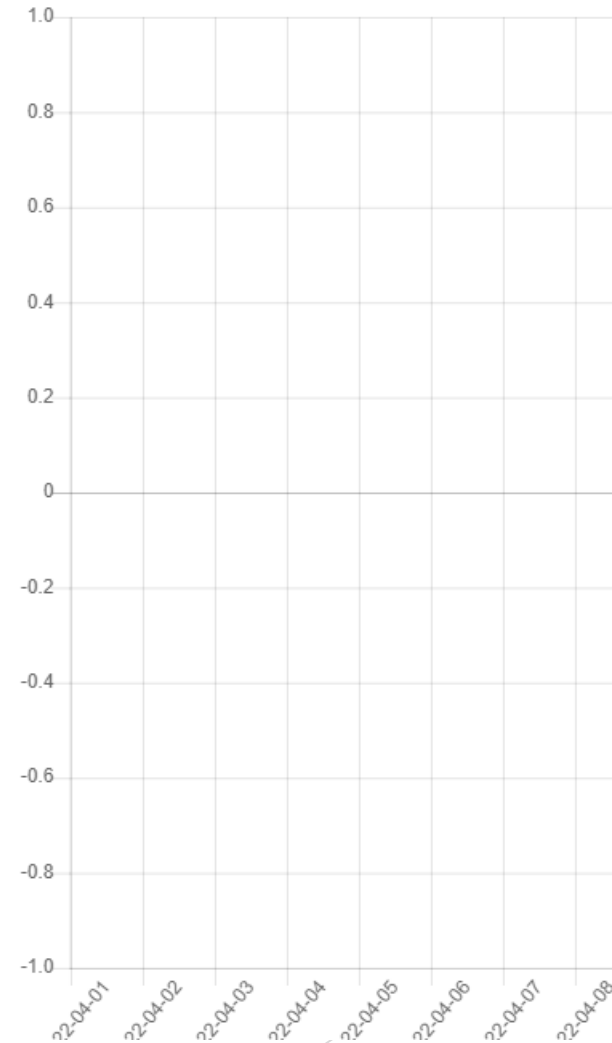
+ New article

CATEGORIES AND FOLDERS	ARTICLES (22)	VIEWS	HELPFUL	NOT HELPFUL
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Periodic Activities	Salary Modification Date Published by Tammy Rives, 4 months ago	1	0	0
Reports	Add Employee PTO Hours Published by Whit Lester, 4 months ago	2	0	0
Setup	Create New Employee Published by Whit Lester, 4 months ago	1	0	0
Setup Groups	Batch Payroll Processing Published by Whit Lester, 4 months ago	10	0	0
Canada Specific	Scheduled Batch	0	0	0
Employee Web Portal				
Error Messages & Trouble Shooting				



# Employee Web Portal: Employee Onboarding Tools

- 👤 Enter Hours Details
- 📄 Enter PTO Request
- 📊 Posted Payroll Processing
- 📁 PTO Request History
- 📁 Hours Request History
- 📁 PTO History
- 👤 Timesheet
- ✓ Employee Change Request
- ✓ Direct Deposits
- 📁 Company Documents
- 📁 Employee Documents
- 📁 Employee Uploaded Files
- ☰ W4 Info
- 📄 Run Tax Report
- 👤+ Add New Employee



# Employee Web Portal: Employee Onboarding Tools

## ← W4 Info

First Name	Middle Name	Last Name
<input type="text" value="TX Test"/>	<input type="text" value="Payroll"/>	<input type="text" value="Employee"/>
Address	Address 2	
<input type="text" value="999 Dynamics Blvd."/>	<input type="text"/>	
City	State	Zip Code
<input type="text" value="TULSA"/>	<input type="text" value="TX"/>	<input type="text" value="99953"/>
Social Security No.	Payroll Tax Marital Status	
<input type="text" value="999-99-8754"/>	<input type="text" value="Married Filing Jointly"/>	
<input checked="" type="checkbox"/> Multiple Jobs or Spouse Works		
Qualifying Children Under 17 (x\$2,000)	Other Dependents (x\$500)	Step3 Total Claim Dependents Amount
<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3000.00"/>
Step4A Other income (not from jobs)	Step4B Deductions	Step4C Extra withholding
<input type="text" value="5.00"/>	<input type="text" value="4.00"/>	<input type="text" value="3.00"/>

## ← Create Employee

Social Security No.

Payroll Division

Code	Description
COOK	Cook
REGISTER	Register

# Resources



[WWW.PRIMOPAYDAY.COM](http://WWW.PRIMOPAYDAY.COM)



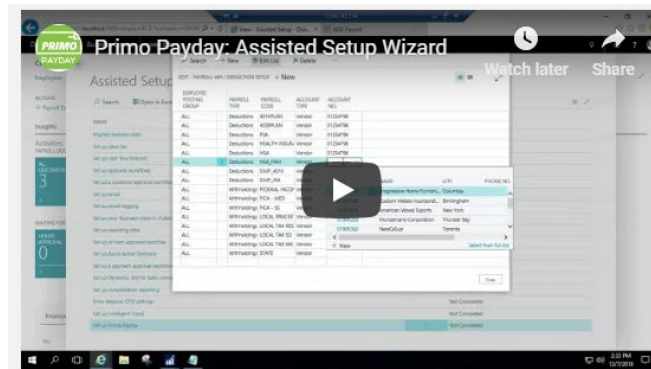
TRAINING VIDEOS



ONLINE MANUALS



PRIMO PAYDAY  
IMPLEMENTATION TEAM



### Assisted Setup Wizard

In this video, we will walk you through the Assisted Setup Wizard process. Learn how to properly implement the basic setups of Primo Payday in several minutes so that you can quickly and easily begin running payroll with the Primo Payday app!



### Payroll Division Setup

In this video, we're going to show you how to establish and setup payroll division codes, which can be used to apply templates to employees to quickly upload employee information.

# Training Videos