**PAYROLL PART 1: THE BASICS OF EMPLOYEE SETUP:**

1. What would happen if we tried to pay an employee that does not have the “Pay Setup Complete” checkbox is NOT selected?

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1. Enterprise has default settings for federal exemptions and marital tax status, what are they?

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1. What field helps to determine the tax jurisdictions that will apply to an employee?

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1. How would you list an employee as being exempt from withholding in Enterprise?

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1. Will you be emailing employees their paystubs? If yes, where do you mark that an employee would like to receive their stub by email?

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1. How do you enroll an employee in direct deposit?

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**PAYROLL PART 2: EMPLOYEE ADJUSTMENTS:**

1. What is an employee adjustment?

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1. How you enroll an employee in secondary direct deposit?

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1. Adjustment *frequency* should be set to what?

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1. What are three things that a user should confirm when setting up an adjustment on an employee record?

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**INVOICE SETUP:**

1. What “status” must a customer record have for assignments to be created?

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1. If a billing address is not specified on the customer record, what address will appear on the invoice?

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1. What is a *worksite*?

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1. The Billing Setup page of the customer record determines what?

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1. What important information lies in the credit and payroll page of the customer record?

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1. What functionality exists within the *invoice detail* page?

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**PO SETUP:**

1. Where are purchase orders created in Enterprise?

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1. What report keeps track of PO Number values and expiration dates?

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1. What options does a user have within the *assign to customer* section of the PO Setup window?

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1. When a PO number is *changed* on an order (i.e. assignments have already been created), what happens?

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**TIME ENTRY PART 1: THE BASICS:**

1. What is the difference between the weekend date and the weekend bill date?

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1. Selecting “Create Timecard from Assignment” does what?

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1. What feature allows users to tab through the time entry dashboard?

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1. What do the following time saving tricks do?

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| Time Saving Trick: | What it Does: |
| Alt + I |  |
| Alt + A |  |
| Alt + C |  |
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1. When hours have been entered and saved on a timecard, what status is the timecard given?

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**TIME ENTRY PART 2: THE DETAILS**

1. How do you properly account for late timecards (timecards from the last processing week turned in this week) in Enterprise?

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1. How do you duplicate timecards en masse, instead of one at a time?

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1. When would you enter in units instead of hours?

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**TIME ENTRY PART 3: ONE TIME ADJUSTMENTS AND OVERRIDES:**

1. What is a timecard adjustment, and what is an example of a timecard adjustment?

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1. When entering a timecard adjustment to *reimburse* an employee, should the dollar amount be entered as a *positive* or a *negative*?

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1. Where do assignment adjustments display within a timecard?

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1. How would you make a one-time override to an employee’s recurring adjustment (ex. Child support)?

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**PROOFING:**

1. Why might a user want to proof their time entry as soon as they done entering in time for a client?

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1. Can a user proof another user’s session?

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1. How can a user see *all* transactions for an employee when investigating a proofing error? Why is this important?

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1. How could a user add a transaction with a $0.00 bill rate onto an invoice?

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**THE PAYROLL WIZARD:**

1. What does the “unpaid W2 transactions” within the payroll wizard represent?

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1. What are the filtering and grouping options within the “transactions” step of the payroll wizard? How will *you* be filtering and grouping transactions?

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1. If transactions within a payroll run are discovered to be incorrect, is it too late to correct them?

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1. What steps should a user take to correct an employee’s adjustment is they determine that the adjustment calculated incorrectly during a payroll run?

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1. What step of the payroll wizard allows pay stubs to be emailed?

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**THE INVOICING WIZARD:**

1. What page within the customer record directly effects how invoices are split and displayed within the invoicing wizard?

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1. If a transaction has been processed by payroll but is incorrect, what correction options do you have *prior* to making the invoice?

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**PAYROLL CORRECTIONS:**

1. Check corrections:

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| Action to Take: | Question #1: | Question #2: |
|  | Is the Check Correct? | Has the Check Been Deposited? |
|  | No | No |
|  | No | Yes |
|  | Yes | No |

1. Can multiple checks be voided at once? How?

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1. What happens when “Reverse Billing” is selected when voiding/reversing a check?

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1. What happens when a check is reversed?

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**INVOICE CORRECTIONS:**

1. What happens every time an invoice is edited?

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1. How would a user *undo* an invoice edit?

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1. When would it be appropriate to *recast* an invoice?

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1. When would it be appropriate to *recalculate taxes/surcharges* on an invoice?

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1. What are three options you have regarding making invoice corrections?

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