



PRESENTED BY:

**AW** AccountingWare.

WELCOME TO

# Learning to Streamline Your Payroll Processes

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Elizabeth Hudspeth & Chris Oden  
Implementation & Project Development Teams



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Evaluate risks before acting on ideas from this session.
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Opinions may not reflect the opinions of AccountingWare.
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# SESSION INFO



## AUDIO / VIDEO

If you cannot hear sound or see the presentation now, adjust or change your settings.



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At the end of the session, fill out a quick survey letting us know how we did.



## RESOURCES

The slides and a recording will be sent via email.



## QUESTIONS

Use the “Questions” panel to chat with the presenters and AccountingWare team.

## ABOUT THE PRESENTERS



**Elizabeth Hudspeth**  
Implementation Specialist

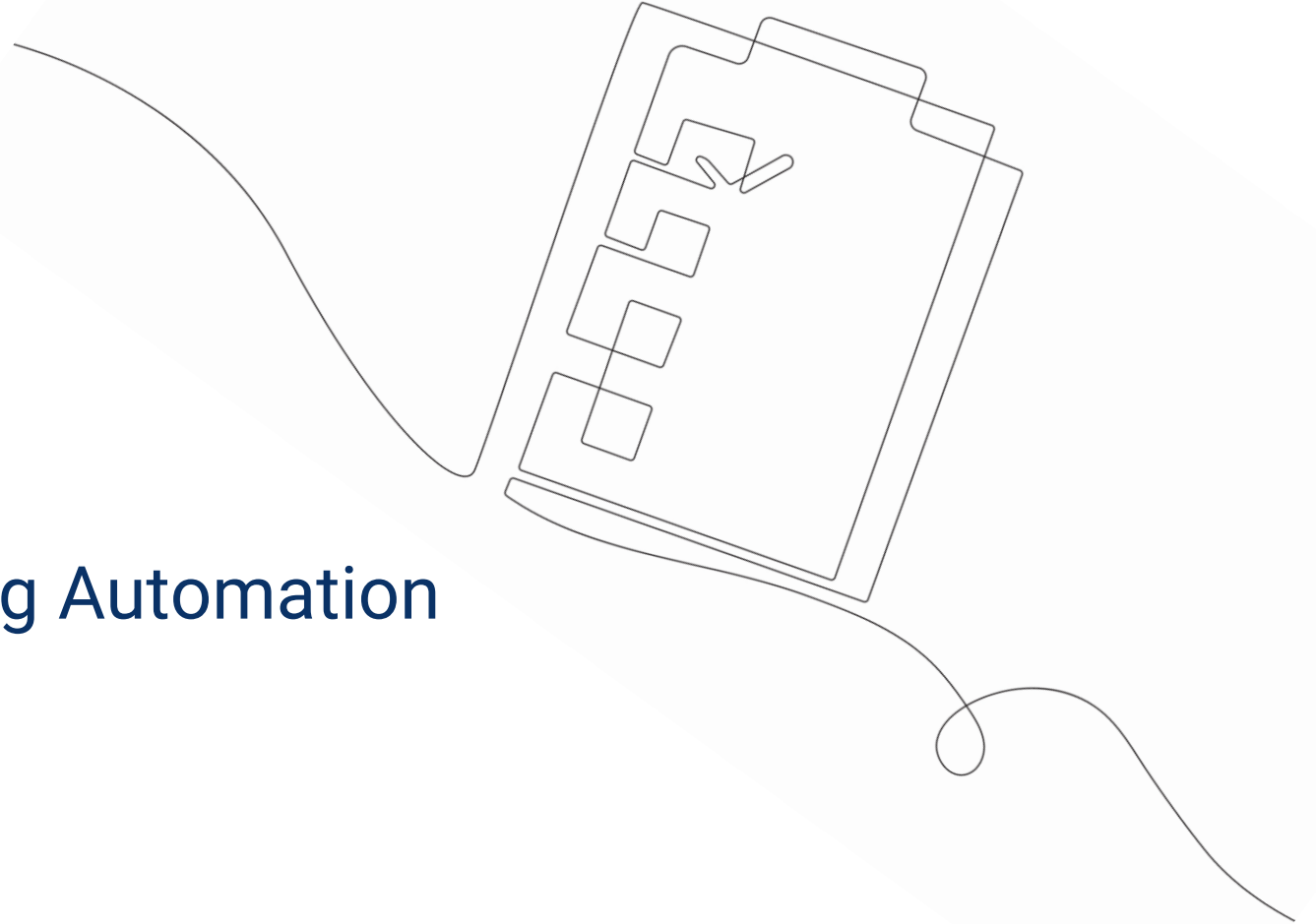


**Chris Oden**  
Project Developer

# Agenda

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- Bots
  - Employee Separation Bot
  - Change Employee Dates Bot
  - Extract Attachments Bot
- Payroll Dashboard
- WorkForceHub & Onboarding Automation
- Self Serve Enhancements
- Reporting



# BOTs



# **BOT:** Employee Separation





ActivityHD Explorer - Employees for American Office Products - Chris Oden

Employee - "PPP" for American Office Products - Chris Oden

**Employee for American Office Products**

**Code:** PPP **Full Name:** Rebecca L. Hinson **SSN:** ●●●●●●

**Goes By:** **Pronouns:**

**Demographics**

Birth Date: 12/5/1976

Gender: Female

Marital Status: Married

**W-2 Settings**

☐ Retirement Plan

☐ Statutory Employee

☐ Third Party Sick Pay

**Phone Numbers**

Work:

Mobile:

Home: 806-795-3107

Fax:

Other:

**HR Classifications**

Ethnic Origin:

Job Category:

**Locations**

Primary: Home → Rebecca L. Hinson  
5720 92nd Street  
Lubbock, TX 79424  
Main: 806-795-3107

Disbursement: Home

Government: Home

**Email**

Work:

Home:

Distrib:

**Statuses**

Date	Status	Memo
1/1/2011	Hired	

**Attributes**

Project

QBT\_Group

Status

Store (2)

Supervisor

TestStore

Type

Union

WCCode

Date	Supervisor	Description
1/1/1994	McGillicutty	Constance McGillicutty

Employee Calculations Disbursement Positions Seniority & Leave Custom Data Links Locations Records Notes Contacts Checks AP Invoices Time Sheets Attachments Other Developer

Edit

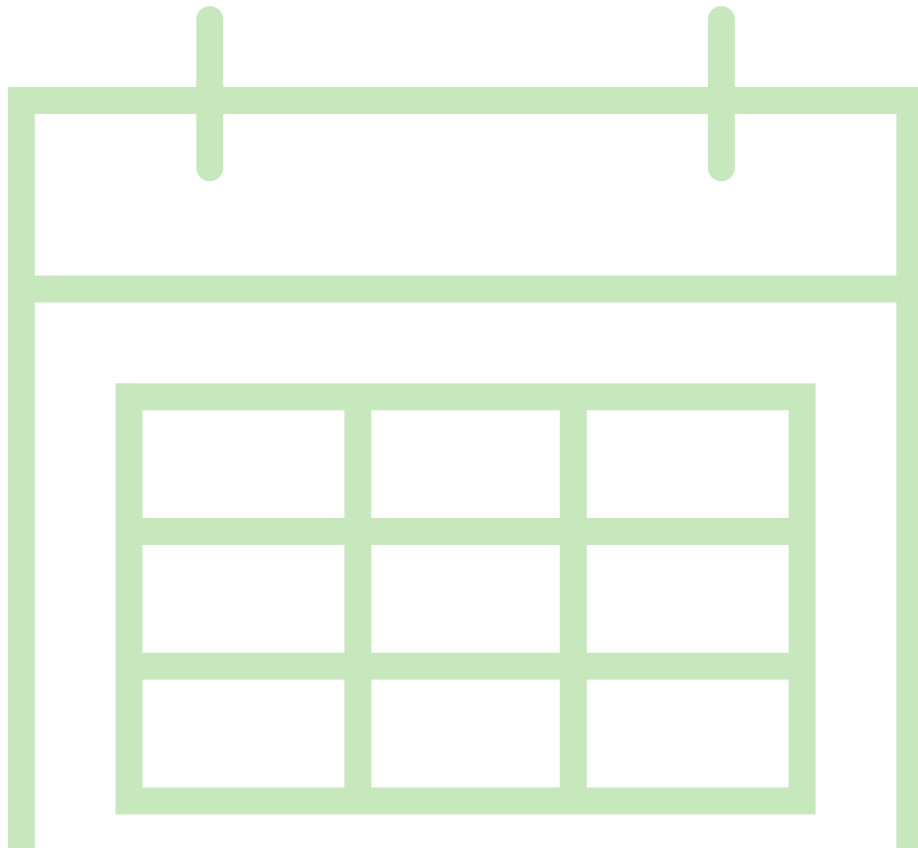
Customers

Total: 70 Selected: 1 Order: Modified

Ledbetter, Chris 7/7/2023 11:44:20 AM coden

# Change Employee Dates

BOT:



# CHANGE EMPLOYEE DATES BOT

Employee - "Hope" for American Office Products - Chris Oden

New Read Save Report Previous Next ACA Prenote ROE Bots

## Employee for American Office Products

Code: Hope Full Name: Emily Hope SSN: ●●●●●●

Goes By: Pronouns:

**Demographics**

Birth Date: 7/15/1980

Gender: Female

Marital Status: Married

**W-2 Settings**

☐ Retirement Plan

☐ Statutory Employee

☐ Third Party Sick Pay

**Phone Numbers**

Work:

Mobile:

Home: 806-698-7523

Fax:

Other:

**HR Classifications**

Ethnic Origin: White Job Category: Officials

**Locations**

Primary: Home

Disbursement: Home

Government: Home

Emily Hope  
1515 Topeka Ave  
Lubbock, TX 79423  
USA  
Main: 806-698-7523

**Email**

Work:

Home:

Distrib:

**Statuses**

Date	Status	Memo
8/16/2024	Active	

**Attributes**

- CBID
- Class
- Converted Location
- Dept (2)
- EEOC
- Employment Code
- Location
- MD County
- MilitaryStatus

Date	CBID	Description
------	------	-------------

Employee Calculations Disbursement Positions Seniority & Leave Custom Data Links Locations Records Notes Contacts Checks AP Invoices Time Sheets Attachments Other Developer











Edit

**BOT:**

# Extract All Attachments



Employee - "00222" for American Office Products - Chris Oden

 New
  Read
  Save
  Report
  Previous
  Next
  ACA
  Prenote
  ROE
  Bots

## Employee for American Office Products

**Code:** 00222    **Full Name:** Daniel G. Ortega Jr.    **SSN:** .....  
**Goes By:**    **Pronouns:**

**Demographics**

Birth Date: 7/4/1959

Gender: Male

Marital Status: Married

**W-2 Settings**

☐ Retirement Plan

☐ Statutory Employee

☐ Third Party Sick Pay

**Phone Numbers**

Work:

Mobile:

Home: 718-852-0788

Fax:

Other:

**HR Classifications**

Ethnic Origin:

Job Category:

**Locations**

Primary: Home → Daniel G. Ortega Jr.  
352 Atlantic Avenue (New)  
Brooklyn, NY 11206  
Main: 718-852-0788

Disbursement: Home

Government: Home

**Statuses**

Date	Status	Memo
2/1/2024	I	

**Attributes**

Date	CBID	Description
1/1/2010		

Employee   Calculations   Disbursement   Positions   Seniority & Leave   Custom   Data Links   Locations   Records   Notes   Contacts   Checks   AP Invoices   Time Sheets   Attachments   Other   Developer

Edit

# WHAT IS: Dashboard



## Payroll Demo



> ACA Menu

▼ Action Lists

General Ledger Review

Process Payroll

> Internal Links

> External Links

### Process Payroll

Enter Time

Proof-Process Time

Proof Checks

Merge Checks

Process Leave

Disbursements

Pay Statements

Reports

403b Process


Tax Deposits

## Create Payroll Runs

- Create A New Payroll Run
  - 3 Payroll Runs

## Enter Time Sheets

- Import Time Sheets
  - This Import will download time for all employees.
- Create Time Sheets directly in Activity
  - Use this option to create timesheets for items not in Workforce Hub.
- **28 Unprocessed Time Sheets**



Activity System (CustAct2)

Administration

Companies

Payroll Demo

Administration

General Ledger

Bank Reconciliation

Accounts Payable

Accounts Receivable

Fixed Assets

Payroll / Human Resources

Employees

Notes

Time Sheets

Payroll Runs

Leave Plans

Checks

Government

Reports

Setup

Purchasing

Payroll / Human Resources for Payroll Demo

Employees

Notes

Time Sheets

Payroll Runs


Leave Plans

Checks

Government

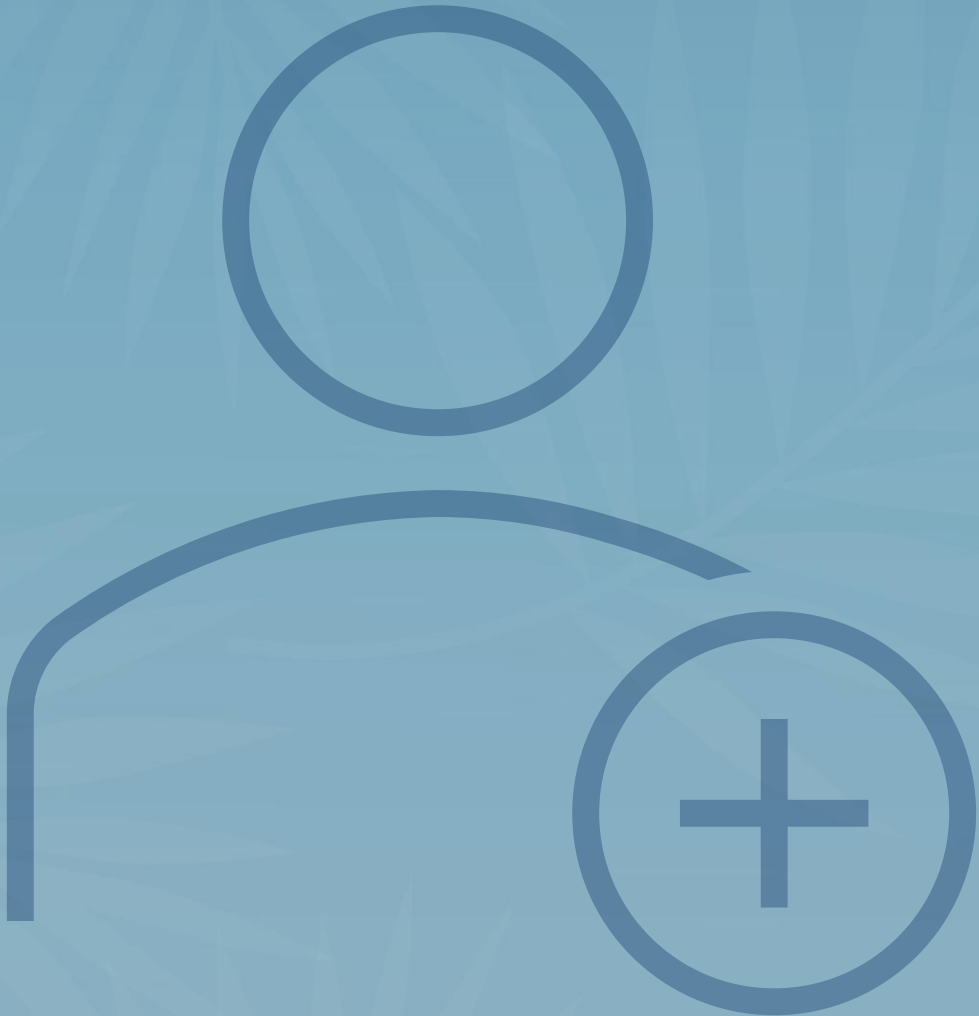
Reports

Setup





# **BOT:** Onboarding



# APPLICANTSTACK ONBOARDING BOT

Citrix Workspace

Provider Portal

WorkforceHub HR

ApplicantStack - Home

accountingwaredemo.applicantstack.com/home/show

Activity Help - Welc...ActivityHD Release...The Payroll Source®QuickBooks Time :...TimeWorks PlusSwipeClock PEPTeams - My Tasks -...Aspire DocsTWP - Employee Lo...Fresno - Client/Sup...Fresno - Employee...TWP Client/Supervi...All Bookmarks

ApplicantStack

HomeJobsCandidatesEmailsTasksEventsLibraryReports

Search Candidates

☆ Announcement

Save your seat for the ApplicantStack Onboard Webinar on 9/12.  
Join us for an Ask Me Anything with ApplicantStack on 8/27 and 9/24.  
Stay up to date with our most recent news and updates on our ApplicantStack blog.  
**Resources**

- Follow us on social media for all the latest updates and news!
  - LinkedIn

Activity Summary

You have 0 new email(s). View Emails

TasksEvents

You have 2 outstanding tasks

- Submit feedback for event "Interview new candidate" [ ], Created 492 Days Ago
- Hiring Manager Review [ ], Created 25 Days Ago

Pipeline Summary - Your jobs and candidates. Click a number in the table to jump to candidates in that stage of your process.

My Jobs

Job	New	Manager Review	Phone Screen	Interview	Reference Check	Job Offer	Total Active	Total Inactive	Days Open
Accounting Manager (Sample) [SAMP-1001]	8	1	0	0	0	0	9	0	26
HR Manager [1003]	0	0	0	0	0	0	0	1	26
Implementation Specialist [1002]	0	0	0	0	0	0	0	1	26
Sales Account Manager [1001]	0	0	0	0	0	0	0	1	514
<b>Total Candidates:</b>	8	1	0	0	0	0	9	3	148

Getting Started

Upload Resumes

Upload Emails

Manage Users

Manage Billing

Update Settings

Open Job Board

My Account

# ENHANCEMENTS: SelfServe

# What is Self Serve?

- Pay Statements
  - W-2s
  - 1095's
  - Leave Balances
  - Misc
- 
- TimeWorksPlus & WorkForceHub



# SELF SERVE ENHANCEMENTS

selfserve-payrolldemo.accountingware.com/Account/Login?ReturnUrl=%2F

☆

3

Activity Help - Welc...

ActivityHD Release...

The Payroll Source®

QuickBooks Time ....

TimeWorks Plus

PEP SwipeClock PEP

Teams - My Tasks - ...

>>

All Bookmarks

ACTiVWS

web services

Powered By: ACTiVWS

web services

jabbott|

.....

Log in

Use your username, email address, or domain credentials (i.e. Aspire\username)

[Create login](#)

[Forgot your password?](#)

**AW** AccountingWare.

# How to upgrade

- ActivityHD v8.44-0 or greater
- Implementation time
  - ActivWebAPI
  - ActivWebServer
- Contact Support



# Reporting



# REPORTING

Activity System (CustAct2)

Administration

Companies

Payroll Demo

Administration

General Ledger

Bank Reconciliation

Accounts Payable

Accounts Receivable

Fixed Assets

Payroll / Human Resources

Employees

Notes

Time Sheets

Payroll Runs

Leave Plans

Checks

Check Lines

Distributions

Disbursements

Government

Reports

Setup

## Payroll / Human Resources Reports for Payroll Demo

- ACA Calendars Listing
- ACA Categories Listing
- ACA Records Listing
- AP Controls Listing
- Check Disbursements Listing
- Check Distributions Listing
- Check GL Detail Report
- Check Lines Listing
- Check Stub Items Listing
- Check Totals Report
- Checks GL Summary Report
- Checks Listing
- Checks Proof Report
- Distribution Analysis
- EEO-1 Section D
- Employee Automatics Listing
- Employee Balances Report
- Employee History Report
- Employee Labels
- Employee Parameters Listing
- Employee Seniority & Leave Ledger Balances
- Employees Listing
- Entries Listing
- Export Controls Listing
- Export Employers Listing
- Export Submitters Listing
- Groups Listing



SUTA Maximum  
Amounts are now shown  
in the Tax Entities Listing



# REPORT ENHANCEMENTS

- > Employees
  - Notes
- > Time Sheets
  - Payroll Runs
- > Leave Plans
- > Checks
- > Government
  - Reports
- > Setup
  - ACA
    - AP Controls
    - Check Stub Items
    - Ethnic Origins
    - Export Controls
    - Export Employers
    - Export Submitters
    - Groups
    - Job Categories
    - Leave Ledgers
    - Note Types
    - Position Pay Grades
    - Position Units of Pay
    - Positions
    - PRCodes
    - Run Types
    - Segments
  - > Segment Items
    - Parameters
    - Parameter Values
  - Statuses
  - Tax Deposit Types
  - Tax Entities**
  - Time Codes
- > Purchasing

## Tax Entities for American Office Products

Filters:  Lookup:  ☐ Include Obsolete

Code	Description	Type	Employer ID	Unemployment ID	SUTA Maximum	SU...	Built-in?
CAN	Canada	Federal	5678613				Built-in
CAN.AB	Alberta	State					
USA	United States	Federal	12-3456789				Built-in
USA.AK	Alaska	State			49,700.00	2024	Built-in
USA.AL	Alabama	State			8,000.00	2017	Built-in
USA.AR	Arkansas	State			7,000.00	2023	Built-in
USA.AZ	Arizona	State			8,000.00	2023	Built-in
USA.CA	California	State			7,000.00	2017	Built-in
USA.CA.SDI	California State Disability I...	Local					Built-in
USA.CO	Colorado	State			23,800.00	2024	Built-in
USA.CT	Connecticut	State			25,000.00	2024	Built-in
USA.DC	District of Columbia	State			9,000.00	2017	Built-in
USA.DE	Delaware	State			10,500.00	2023	Built-in
USA.FL	Florida	State			7,000.00	2017	Built-in
USA.GA	Georgia	State			9,500.00	2017	Built-in
USA.HI	Hawaii	State			59,100.00	2024	Built-in
USA.IA	Iowa	State			38,200.00	2024	Built-in
USA.ID	Idaho	State			53,500.00	2024	Built-in
USA.IL	Illinois	State			13,590.00	2024	Built-in
USA.IN	Indiana	State			9,500.00	2017	Built-in
USA.IN.CO	Indiana County	Local					
USA.KS	Kansas	State			14,000.00	2017	Built-in
USA.KY	Kentucky	State			11,400.00	2024	Built-in
USA.LA	Louisiana	State			7,700.00	2017	Built-in
USA.MA	Massachusetts	State			15,000.00	2017	Built-in
USA.MD	Maryland	State			8,500.00	2017	Built-in
USA.ME	Maine	State			12,000.00	2017	Built-in
USA.MI	Michigan	State			9,500.00	2021	Built-in



# Employee History Report



Employees for Demo Casa Blanca JPJ

Filters:

Lookup:

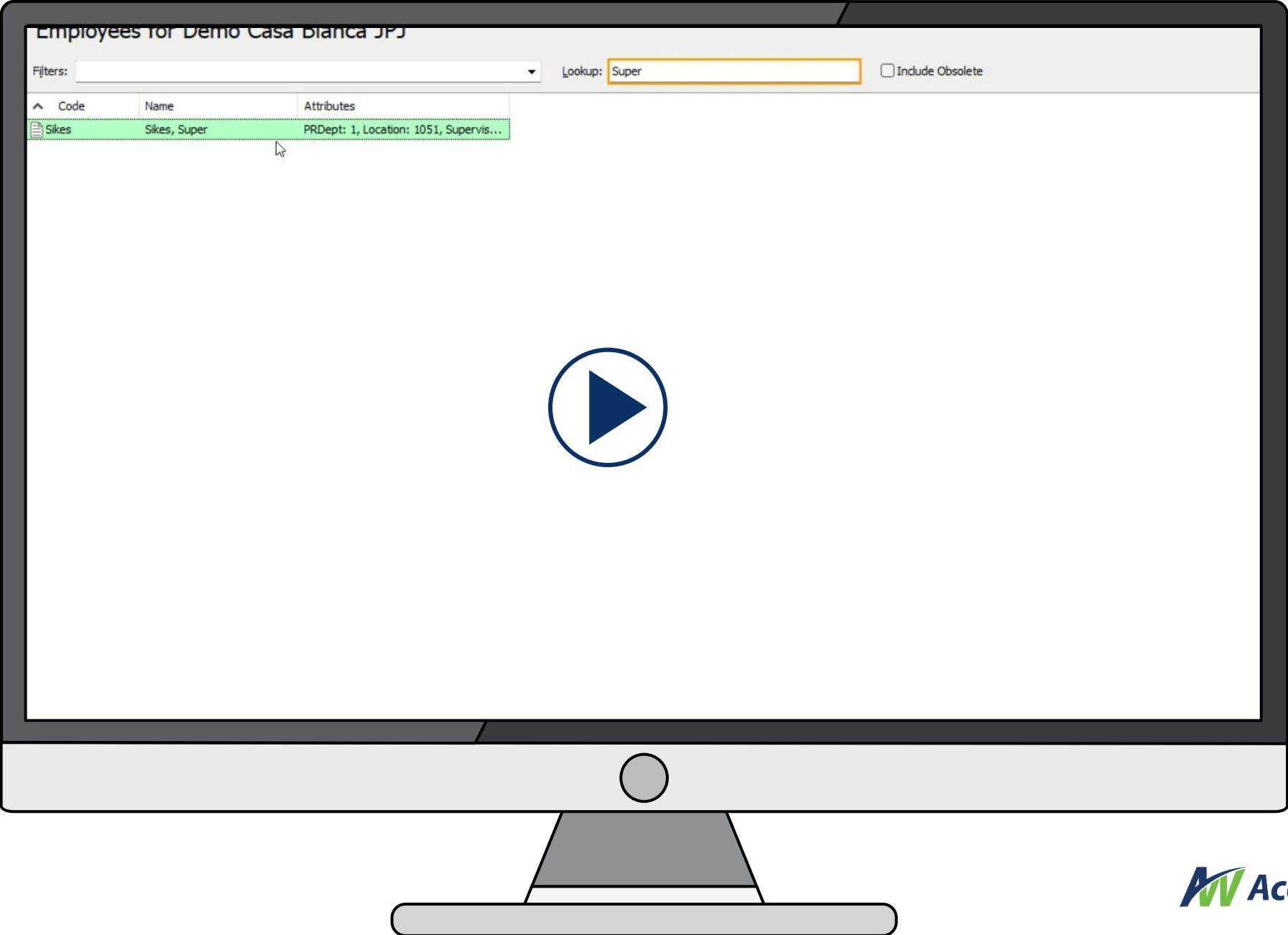
☐ Include Obsolete

Code	Name	Attributes
Sikes	Sikes, Super	PRDept: 1, Location: 1051, Supervis...



# Employee Change Log Analysis Report

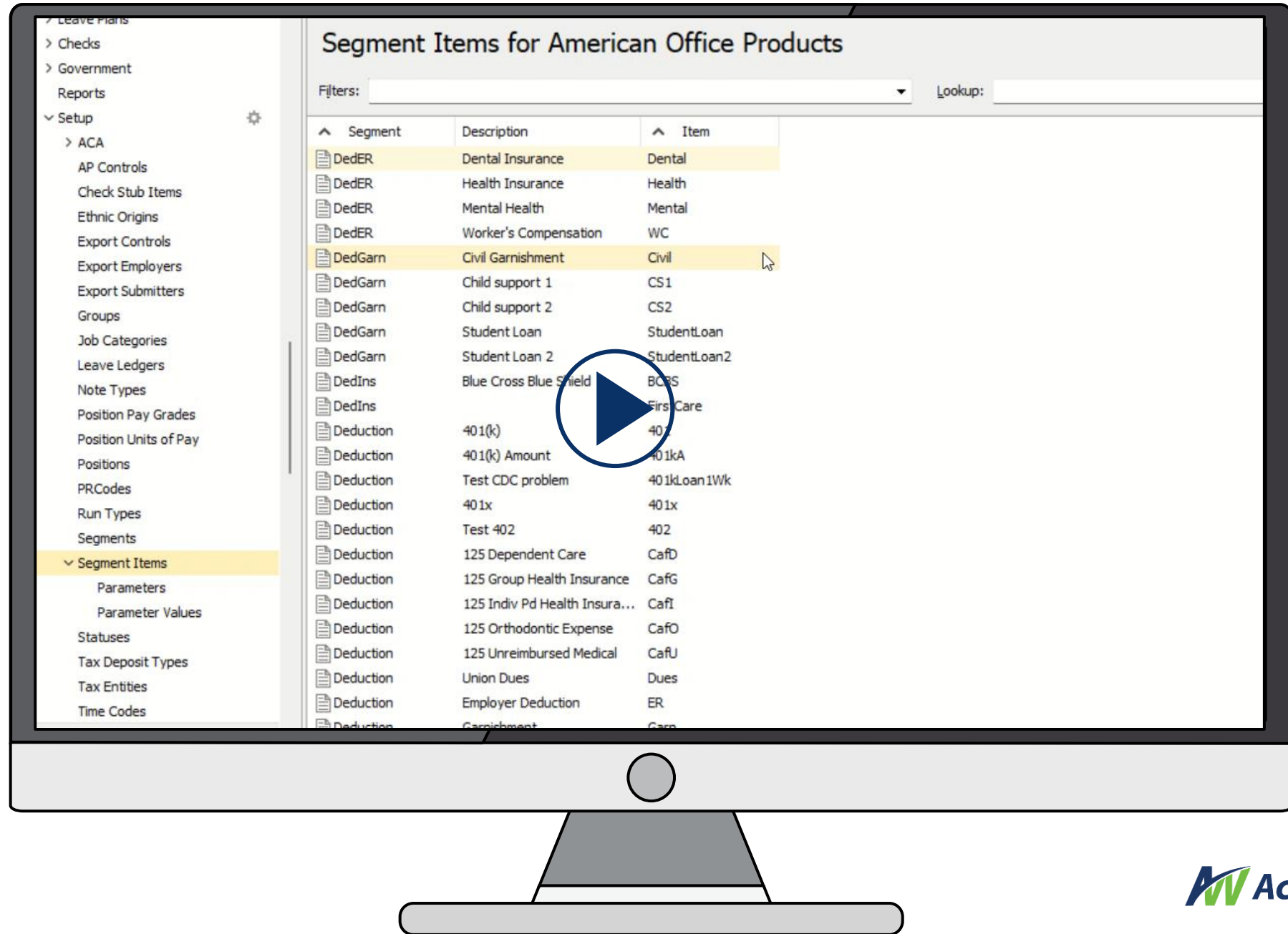




Last Work Date Column  
added to PR Segment  
Items View









**SUBMIT YOUR  
QUESTIONS!**

# Next Session

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## Mastering Contract Processing: Streamline, Optimize, Manage

Thursday, August 29th  
11:00 AM (CT)

Lori Bogart & Stefanie Rosales

### ALL SESSIONS

- Bruce and Grant's Excellent Unboxing Adventure
- Cybersecurity Essentials for Today's Internet Connected World
- Do More With Less: Publishing Financial Designs
- Back to Basics
- General Ledger: Controller Workshop
- The Right Tool for the Job: Automation
- Enhancing Purchasing: Boosting Visibility, Efficiency, and Commitments
- Attributes: Multi-Dimensional Accounting
- New Graphics Capabilities in ActivityHD
- Learning to Streamline Your Payroll Processes
- Mastering Contract Processing: Streamline, Optimize, Manage
- Payroll Problem-Solving: Become a Master of Troubleshooting



*Remember to complete the survey!*

THANKS FOR JOINING

# Learning to Streamline Your Payroll Processes

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Elizabeth Hudspeth

[ehudspeth@accountingware.com](mailto:ehudspeth@accountingware.com)

[LinkedIn.com/in/elizabeth-hudspeth](https://www.linkedin.com/in/elizabeth-hudspeth)

Chris Oden

[coden@accountingware.com](mailto:coden@accountingware.com)

[LinkedIn.com/in/christopher-oden-050264200](https://www.linkedin.com/in/christopher-oden-050264200)

