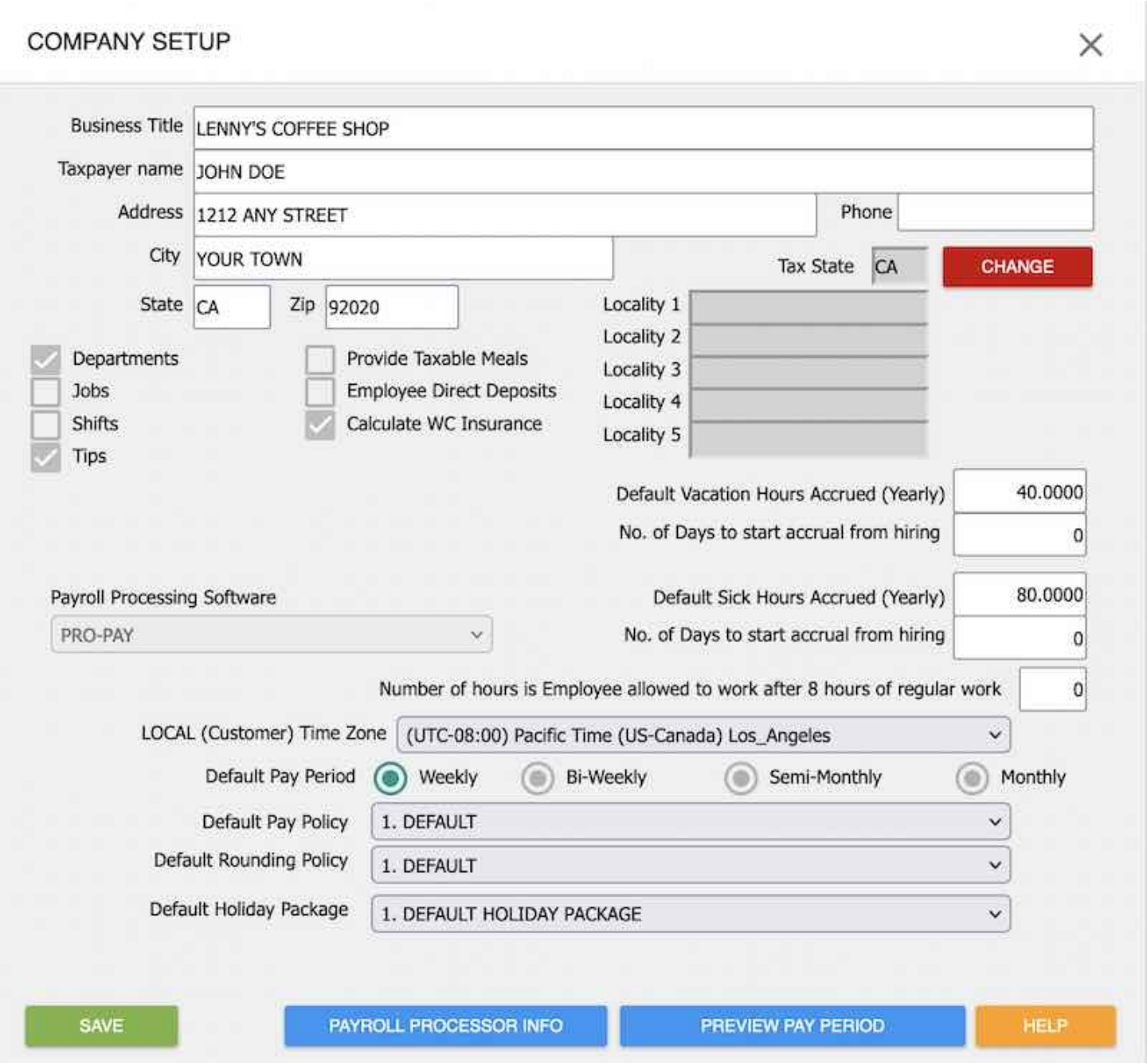
Setup Your Company

Getting Started · https://staging.proclock.com/help/kb/managers/manager-getting-started/company-setup-2/

Welcome to ProClock! Before you can begin tracking time, it’s important to configure your company’s core information using the **Company Setup** screen. This guide will walk you through each section of the Company Setup page, explain key features, answer common questions, and provide troubleshooting steps to ensure a smooth setup experience.



Overview: What is the Company Setup Screen?

The **Company Setup** screen is the central location for entering your company's essential information and enabling or disabling key features in ProClock. Proper setup ensures:

- Accurate payroll processing
- Compliance with tax regulations

- Correct functioning of features like Departments, Jobs, Shifts, Tips, Workers' Compensation, Direct Deposits, and Vacation/Sick Accruals

If your account was set up by your payroll processor, most information should already be entered. In this case, you may only need to select your company's time zone.

Key Features and Configuration Steps

1. Company Information

Business Title:

Enter your business name.

- Sole proprietors: Use your DBA or owner's name.
- Partnerships: Use the general partner's name.
- Corporations: Use the registered corporation name.

Taxpayer Name:

Enter the name recognized by local, state, and federal tax authorities.

Address, City, State, ZIP Code:

Provide your business's physical address.

Tax State:

Select the employer's tax state.

- Click the **Change** button to choose from a list.
- If your company is not multistate, this option will be disabled.

Locality 1-5:

These fields are imported from ProPay payroll software.

- If you do not use ProPay, these options will be disabled.

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2. Feature Enablement

Enable or disable features according to your company's needs:

Departments

- *Are Departments Used*: Check this box to require department setup and assignment for each employee.
- Manage departments via: Main Menu → SETUP → Departments

Jobs

- *Job Cost Report Needed*: Check this box to assign job numbers to payroll entries and generate job cost reports.

Shifts

- *Use Shifts*: Enable if your company schedules employees in shifts.

Tips

- *Will Your Payroll Include Tips*: Enable if employees receive tips.

Taxable Meals

- *Provide Taxable Meals*: Enable if you provide free, taxable meals to employees.
- For more information, refer to IRS Circular E.

Direct Deposits

- *Employee Direct Deposits*: Enable if employees will be paid via direct deposit.

Workers' Compensation

- *Calculate WC Insurance*: Enable if you need to calculate Workers' Compensation insurance in reports.

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3. Vacation and Sick Accruals

Default Vacation/Sick Hours Accrued (Yearly):
Enter the default number of vacation and sick hours accrued per year. These values will be used as defaults for new employees.

Number of Days to Start Accrual from Hiring:

Specify the waiting period (in days) before employees begin accruing vacation or sick time.

- Example: Enter 90 for a 90-day waiting period.

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4. Pay Period and Policy Settings

Default Pay Period

- Weekly
- Bi-Weekly
- Semi-Weekly
- Monthly

Default Pay Policy, Rounding Policy, and Holiday Package:

These must be defined before selection. Choose the appropriate default policies for your company.

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5. Time Zone Configuration

Time Zone:

Set your company's correct time zone.

- This ensures accurate time tracking, especially if your server and company are in different locations.
- *Example*: If your server is in Los Angeles and your company operates in New York, setting the correct time zone ensures employee punches are recorded accurately.

Common User Questions

Q: What if my company information was already entered by my payroll processor?

A: Review the information for accuracy. You may only need to select your time zone.

Q: Can I change my company's tax state later?

A: Yes, but only if your company is set up as a multistate employer. Otherwise, this option will be disabled.

Q: What if my payroll processor doesn't use ProPay?

A: The Locality 1-5 fields will be disabled and can be ignored.

Q: How do I enable or configure additional features after setup?

A: Navigate to Main Menu → SETUP and select the relevant section (e.g., Departments, Jobs, Shifts).

Troubleshooting Steps

Issue: Unable to edit certain fields (e.g., Tax State, Locality fields)

- *Solution*: These fields may be disabled based on your company's configuration (e.g., not a multistate employer, not using ProPay). This is normal.

Issue: Employees are not accruing vacation/sick time as expected

- *Solution*:
  1. Check the "Default Vacation/Sick Hours Accrued (Yearly)" and "Number of Days to Start Accrual from Hiring" fields for correct values.
  2. Ensure the employee's hire date is entered correctly.

Issue: Payroll features (e.g., Direct Deposit, Tips) are not available

- *Solution*:
  1. Return to the Company Setup screen and ensure the relevant feature is enabled.
  2. Save changes and refresh the page.

Issue: Time punches are showing incorrect times

- *Solution*:
  1. Verify the company's time zone setting in the Company Setup screen.
  2. Update if necessary and save changes.