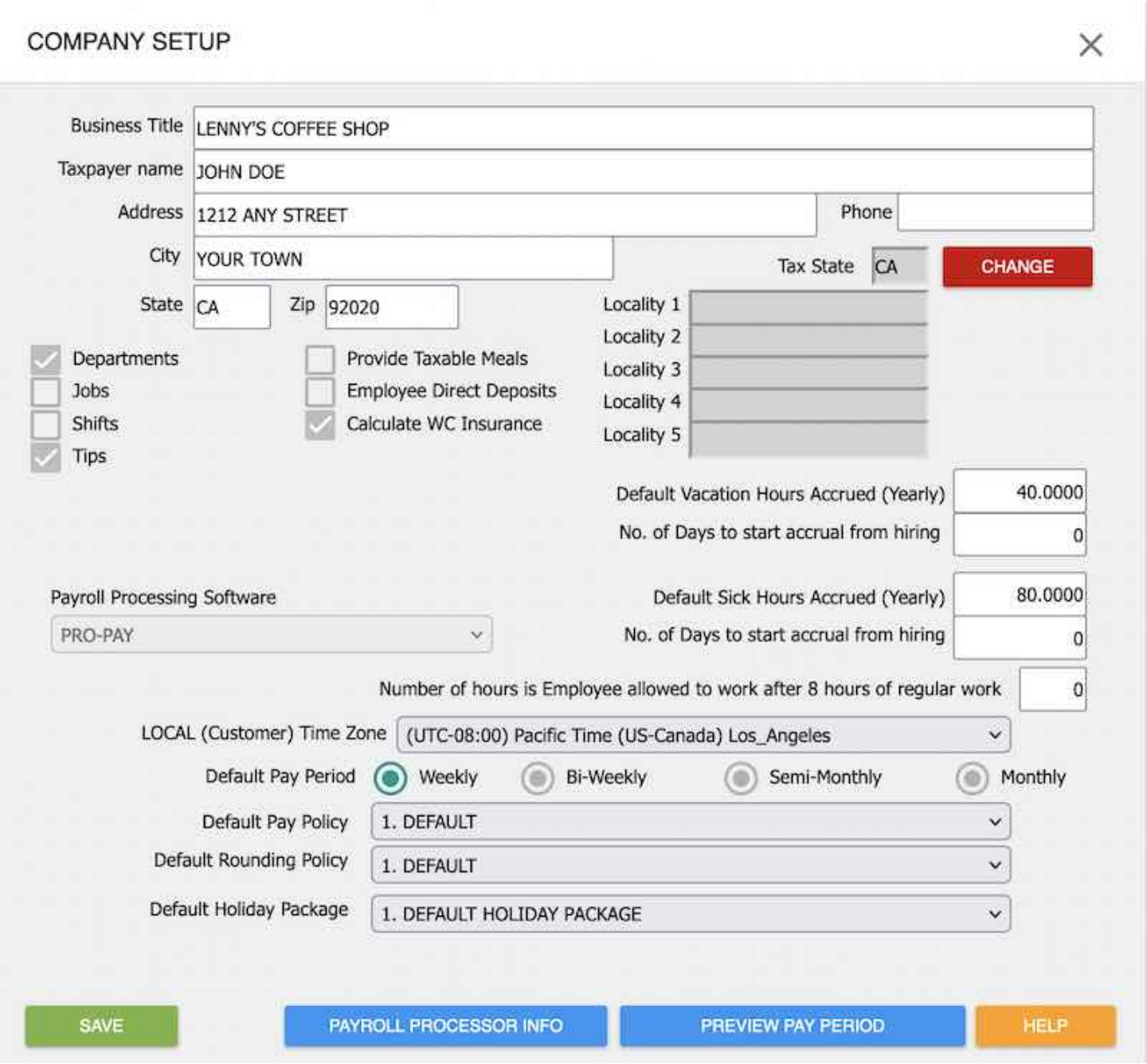
Company Setup

Settings · https://staging.proclock.com/help/kb/managers/manager-settings/company-setup/

Overview

The **Company Setup** page is the central location for entering your company’s core information and enabling or disabling key features within the system. Proper configuration here ensures accurate payroll processing, compliance with tax regulations, and the correct functioning of additional features such as Departments, Jobs, Shifts, Tips, Workers’ Compensation, Direct Deposits, and Vacation/Sick Accruals.

Once features are enabled, you can further configure them by navigating to **Main Menu → SETUP** and selecting the relevant section.



Key Features

1. Company Information

- **Business Title**:

  Enter your business name. If you are a sole proprietor, use your DBA or owner's name.

  Partnerships should use the general partner's name, and corporations should 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.
  ***Note**: 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

You can enable or disable the following features according to your company's needs:

- **Departments**
  - *Are Departments Used*: Check this box to require department setup and assignment for each employee.
  - Departments can be managed 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.

- Refer to IRS Circular E for more information: www.irs.gov

- **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 (e.g., enter 90 for a 90-day waiting period).

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4. Pay Period and Policy Settings

- **Default Pay Period**:
  Select from Weekly, Bi-Weekly, Semi-Weekly, or 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.*

Frequently Asked Questions (FAQs)

Q1: What happens if I enable a feature by mistake?

A: You can return to the Company Setup page and uncheck the feature. Any related configuration or data may need to be reviewed or updated accordingly.

Q2: Why can’t I change the Tax State or Locality fields?

A: These options are only available if your company is set up as multistate or uses ProPay payroll software.

Q3: How do I define policies or holiday packages before selecting them?

A: Navigate to **Main Menu → SETUP** and select the relevant section (e.g., Pay Policies, Holiday Packages) to define them.

Q4: What if my company’s time zone is not set correctly?

A: Incorrect time zone settings can lead to inaccurate time records. Always verify and update the time zone in the Company Setup page.

Q5: Can I update company information after initial setup?

A: Yes, you can return to the Company Setup page at any time to update your company’s information.

Troubleshooting

Issue 1: Unable to Enable/Disable a Feature

1. Ensure you have the necessary administrative permissions.
2. Refresh the page and try again.
3. If the option remains disabled, check if it is dependent on another setting (e.g., Locality fields require ProPay integration).

Issue 2: Incorrect Time Records

1. Verify the company time zone is set correctly.
2. Check if the server and company locations differ and adjust the time zone accordingly.
3. Save changes and test by recording a new punch.

Issue 3: Policy or Holiday Package Not Selectable

1. Go to **Main Menu → SETUP**.
2. Define the required policy or holiday package.
3. Return to the Company Setup page and select the newly defined option.