



Let's Get Started

BEGINNERS GUIDE TO PAYROLL PROCESSING

IN THIS E-BOOK, WE'LL GO OVER THE BASICS OF
SETTING UP YOUR QUICKBOOKS ONLINE PAYROLL
ACCOUNT AND HOW TO USE IT EFFECTIVELY



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"EVERY EXPERT WAS ONCE A BEGINNER"

RUTHERFORD B. HAYES



BENEFITS OF QUICKBOOKS ONLINE PAYROLL

QuickBooks allows you to automate the entire payroll process from entering in hours to filing and paying taxes. (My personal favorite perk!)

QuickBooks offers benefits like HR Support, 401K plans & even medical benefits. As your business grows, so can your employee benefits without having to switch payroll processing software.



If you're a QuickBooks Online Accounting user, QuickBooks Payroll will allow seamless integration of your payroll application with your accounting software. Plus, you can automatically post payroll entries to your general ledger.

If you're a small business owner not using QuickBooks Online Accounting, you can still benefit from using QuickBooks Online Payroll. You will have affordable access to full-service payroll at any plan level, free direct deposit, and also offers a time tracking app to help track payroll hours.

01

GATHER PROPER BUSINESS INFORMATION

The first step to start payroll is to gather all appropriate business and employee information. If you have not already done so, you will need to file your business with the IRS & the state you are doing business in.

Check out my *Preliminary Requirements for Setting up Payroll* eBook for more information on filing requirements.

LET'S DO IT!



PREPERATION CHECKLIST

Prior to running your first payroll, you will need:

1. An Employer Identification Number (EIN)

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2. State and local tax identification numbers

☐

3. Employee information

☐

- Form W-4 for full- and part-time employees
- Form W-9 for contract and freelance employees
- Hire date
- Birth date
- Any paycheck deductions
- Sick, vacation, PTO accrual rates and balance (if applicable)

4. Employee wage or salary information

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5. Employee direct deposit information

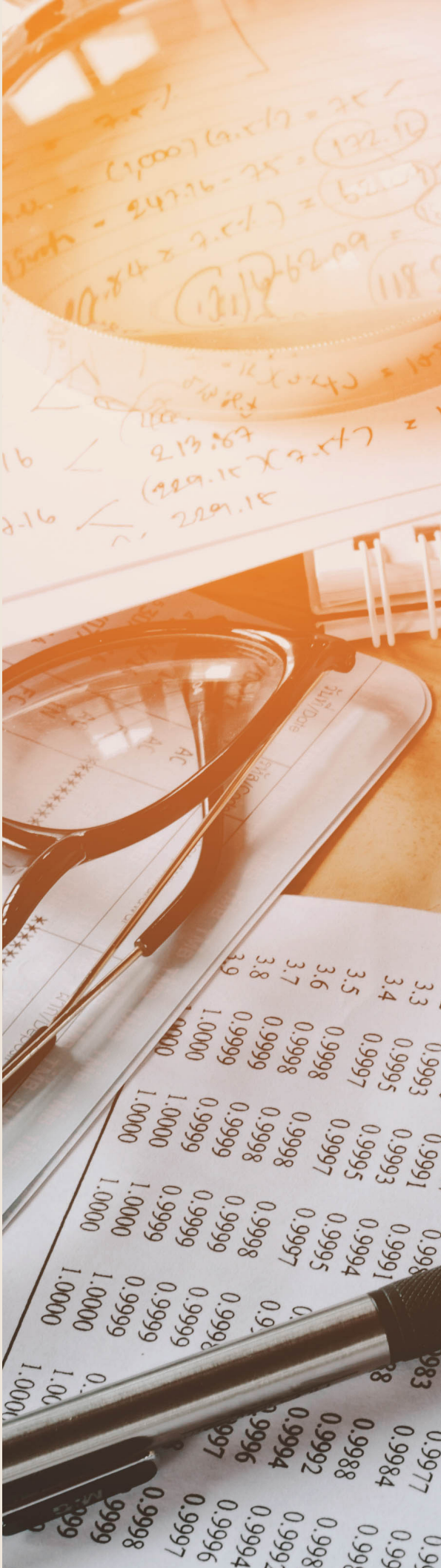
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6. Federal and state withholding accounts

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- Electronic Federal Tax Payment System account (EFTPS)
- State unemployment insurance account (SUTA),
- State new hire reporting account
- State worker's compensation insurance account





02

CREATE A QUICKBOOKS ACCOUNT

In this section, we will go over how to create your QuickBooks payroll account as well as the different plans that are offered.

Your Payroll subscription can be a stand alone account, as well as an add on to your current QuickBooks Online account. Regardless, the plans are the same, and the setup is the same as well.

LET'S DO IT!



CHOOSE A PLAN

There are three different payroll plans to choose from: Core, Premium & Elite.

You can choose standalone payroll subscriptions as well as an add on service if you already have a QuickBooks online account.

Helpful tip : If you choose to outsource payroll, We can save you 30% on your monthly payroll cost to any plan you choose.

The screenshot displays the QuickBooks Payroll pricing page. At the top, there's a navigation bar with the QuickBooks logo, a phone icon for sales (1.800.591.7835), and a 'Sign In' link. Below this is a promotional banner for 'Buy Now' (Save 50% for 3 months*) and 'Trial' (Try it free for 30 days). The main content area features three plan cards: Core, Premium (labeled 'MOST POPULAR'), and Elite (labeled 'NEW'). Each card lists the plan's description, pricing, and a list of features. The Core plan costs \$22.50/month (+\$4/employee), Premium costs \$37.50/month (+\$8/employee), and Elite costs \$62.50/month (+\$10/employee). All plans include full-service payroll, auto payroll, health benefits, 401(k) plans, workers comp, expert product support, and next-day direct deposit. Premium and Elite also include same-day direct deposit, HR support center, expert setup review, and track time on the go. Elite additionally offers white glove customized setup, tax penalty protection, 24/7 expert product support, and a personal HR advisor. A footer bar indicates a 50% discount on QuickBooks Accounting for the first 3 months.

Plan	Description	Price	Additional Cost	Key Features
Core	Cover the basics with simple, reliable automated payroll designed for small teams.	\$22 ⁵⁰ /mo	+\$4/employee per month	Full-service payroll, Auto Payroll, Health benefits, 401(k) plans, Workers Comp, Expert product support, Next-day direct deposit.
Premium	Keep growing with automated payroll, time tracking, same-day direct deposit, expert setup review, and HR support.	\$37 ⁵⁰ /mo	+\$8/employee per month	Full-service payroll, Auto Payroll, Health benefits, 401(k) plans, Workers Comp, Expert product support, Same-day direct deposit, HR support center, Expert setup review, Track time on the go.
Elite	Protect your business with automated payroll and a suite of services that offer end-to-end setup, certified HR support, and tax penalty protection.	\$62 ⁵⁰ /mo	+\$10/employee per month	Full-service payroll, Auto Payroll, Health benefits, 401(k) plans, Workers Comp, Expert product support, Same-day direct deposit, HR support center, White glove customized setup, Track time and projects on the go, Tax penalty protection ¹ , 24/7 expert product support, Personal HR advisor.

PLAN PERKS



CORE

- Full-service payroll
- Includes automated taxes and forms
- Auto Payroll
- 1099 E-File & Pay
- Expert product support
- Next-day direct deposit
- 401(K) Plans
- Health benefits for your team



PREMIUM

- Everything listed in Core
- Same-day direct deposit
- Expert review
- Track time on the go
- HR support center
- Workers' comp administration



ELITE

- Everything listed in Premium
- Expert setup
- Track time and projects on the go
- 24/7 expert product support
- Tax Penalty Protection
- Personal HR advisor



03

COMPLETE YOUR PAYROLL SETUP TASKS

You've gathered all the necessary documentation, you have picked your QuickBooks plan, Now its time to setup your account for success!

Pro Tip: When you outsource your payroll with Hodges Payroll Services, we setup the entire profile for you, as well as determine your filing schedule for tax payments so you don't have to.

LET'S DO IT!

A decorative graphic consisting of a curved line that starts under the text 'LET'S DO IT!' and ends in an arrow pointing to the right.

6 STEP

PROCESS



01

Step One

1. Gather the following info:
 - Your next paycheck date (or the date you'd like to start paying your team in QuickBooks)
 - The physical address where all or most of your employees work
 - The payroll contact name, email address and phone number. This is the main person responsible for paying your team, which may be you.
2. Open QuickBooks Online.
3. Go to Payroll, then select Overview (Take me there).
4. Select Get started.
5. Follow the on-screen prompts to fill in the info requested.



02

Step Two

Taskbar: *Tell us about your Team*

In this task, you'll enter your employees' info, and you can invite your employees to enter some of their own info through the free QuickBooks Workforce product if you enter in their email address.

This information can be entered manually as well with the information gathered in chapter 1.

6 STEP

PROCESS



03

STEP THREE

Taskbar: Fill in your tax information

In this task, you'll add your federal and state payroll tax information

Note: Missing or incorrect information entered in this section may result in tax notices, or the inability for tax payments and filings to be made from within QuickBooks.

Info you'll need from Chapter 1:

- Federal Employer Identification Number (FEIN)
- State Withholding and/or Unemployment account numbers
- Federal and state deposit frequencies: how often you are required by the IRS and state to pay your taxes e
- State tax rates: Unemployment, surcharges, state disability, paid family leave, etc.



04

STEP FOUR

Taskbar: Add a workers' comp policy

Need to set up a workers' comp policy for your business? Intuit works with AP Intego to help you find competitive rates or connect an existing policy through the service.

6 STEP

PROCESS

05

STEP FIVE

Taskbar: Connect your bank

In this task, you'll connect your payroll bank account so you can use direct deposit and you can pay and file your payroll taxes.

You may be able to connect it instantly so you can use direct deposit right away.

Info you'll need:

- Principal officer's name, home address, Social Security number, and birth date (this is the authorized signer on the payroll bank account)
- Your business bank account online User ID and password, or the routing and account number of the account you want to use for your direct deposits and payroll taxes.

06

STEP SIX

Taskbar: Sign Tax Documents

In this task, your principal officer will electronically sign payroll authorization forms.

Info you'll need:

- Principal officer present to answer specific questions for the payroll authorization forms



04

RUN YOUR FIRST PAYROLL

You've gathered all the necessary documentation, you have picked your QuickBooks plan, and setup your account, Now its time to run your first payroll !!

Pro Tip: if you only have salary employees, or employees who have the same hours every payroll, you can turn on automated payroll processing and everything will process automatically for you.

LET'S DO IT!



RUN YOUR FIRST PAYROLL

You can run payroll up to one day before the pay date. You will receive email notifications when it is time to run payroll in case you forget.

When you are ready to run payroll, you will click on the "Run Payroll" Tab to the left under shortcuts, or if you are one day before the pay date, you can click on the "Get started" Tab in green. (See Below)

The screenshot shows a web application interface for payroll management. At the top, there's a header with a hamburger menu icon and the text "Glamour Modern Fashion". Below this is a "Payroll" section with a horizontal navigation bar containing tabs: "Overview" (highlighted with a green underline), "Employees", "Contractors", "Workers' comp", "Benefits", "HR advisor", and "Compliance". The main content area is divided into several sections. On the left, a large card titled "It's time to run payroll" features a prominent green "Let's go" button and a link to "View paycheck list". To the right, a "SHORTCUTS" section displays four icons: a person with a dollar sign (labeled "Run payroll"), a person with a plus sign (labeled "Add employee"), a briefcase with a dollar sign (labeled "Pay contractor"), and a briefcase with a plus sign (labeled "Add contractor"). Below the shortcuts, a "TO DO LIST" section states "Looks like you're all caught up." On the far right, a "STATUS" section with a "NEW" badge shows a calendar icon and the text "Auto Payroll".



THANK YOU FOR READING!

As promised, for purchasing this e-book you can take full advantage of my complementary one-on-one phone call by booking an appointment through the link that was sent to you with this e-book.

Don't worry ! If you lost that e-mail, you can send a message directly to nicole@hodgespayroll.com.

Nicole xoxo