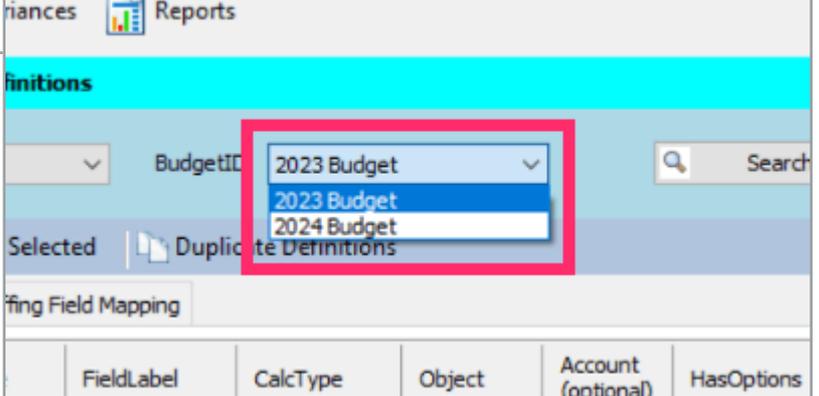
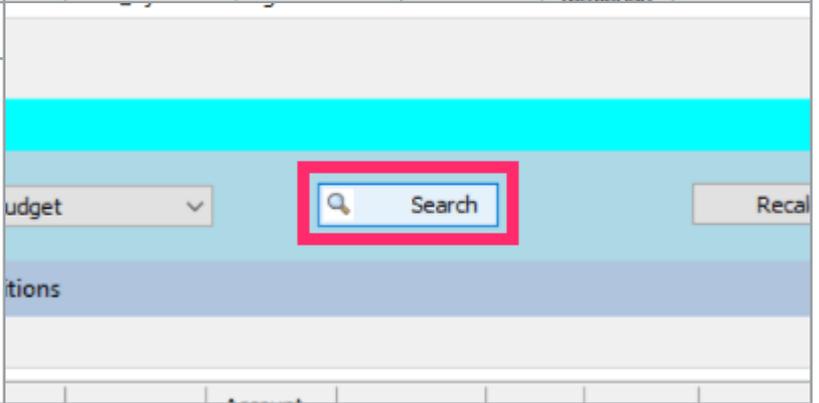


| | |
|--|----------|
| <p> Dynamic Budgets User Guide for Payroll Expense Definitions</p> | <p>1</p> |
| <p> Click on Payroll.</p> | <p>2</p> |
| <p> Click on Payroll Expense Definitions.</p> | <p>3</p> |
| <p> Click on CompanyDB dropdown list. Make a selection.</p> <p>In this example, we will select DB3147_two18.</p> | <p>4</p> |

| | |
|--|---|
| <p>5</p> <p>Click on the BudgetID dropdown list. Make a selection.</p> <p>In this example, we will select 2023 Budget.</p> |  <p>The screenshot shows a software interface with a dropdown menu for 'BudgetID'. The menu is open, displaying three options: '2023 Budget', '2023 Budget', and '2024 Budget'. The first '2023 Budget' option is highlighted in blue. A red rectangular box is drawn around the entire dropdown menu area.</p> |
| <p>6</p> <p>Click on Search.</p> |  <p>The screenshot shows the same software interface as above, but the dropdown menu is closed. A red rectangular box is drawn around a 'Search' button located to the right of the 'BudgetID' dropdown.</p> |



Note: We are going to enter the field labels and CalcType needed for this company.

7

| | FieldName | FieldLabel | CalcType | Object | Account (optional) |
|--|-----------|------------|----------|--------|--------------------|
| | Field1 | | | | |
| | Field2 | | | | |
| | Field3 | | | | |
| | Field4 | | | | |
| | Field5 | | | | |
| | Field6 | | | | |
| | Field7 | | | | |
| | Field8 | | | | |
| | Field9 | | | | |
| | Field10 | | | | |
| | Field11 | | | | |
| | Field12 | | | | |
| | Field13 | | | | |
| | Field14 | | | | |
| | Field15 | | | | |
| | Field16 | | | | |
| | Field17 | | | | |
| | Field18 | | | | |
| | Field19 | | | | |
| | Field20 | | | | |



Note: Here are some typical examples of Fieldlabels used by organizations.

Type the Fieldlabel and press tab. Do this until you have entered all of the labels you want to use.

8

| Expense Definitions | | Hourly Staffing Field Mapping | |
|---------------------|-----------|-------------------------------|----------------------|
| | SortOrder | FieldName | FieldLabel |
| | 0 | Field1 | FICA |
| | 0 | Field2 | Medicare |
| | 0 | Field3 | Medical |
| | 0 | Field4 | Dental |
| | 0 | Field5 | Vision |
| | 0 | Field6 | WC |
| | 0 | Field7 | Life |
| | 0 | Field8 | Pension |
| | 0 | Field9 | 401k |
| | 0 | Field10 | Car Allowance |
| | 0 | Field11 | Phone Allowance |
| | 0 | Field12 | Continuing Education |
| | 0 | Field13 | Bonus Amount |
| | 0 | Field14 | Bonus Type |
| ▶ | 0 | Field15 | |



Note: Here are some typical examples of CalcType used by organizations.

Select the CalcType and press tab. Do this until you have entered all of the types you want to use.

9 Hourly Staffing Field Mapping

| FieldName | FieldLabel | CalcType |
|-----------|----------------------|-----------------------------------|
| eld1 | FICA | Pcnt-TotalTaxable-Capped |
| eld2 | Medicare | Tax Liability |
| eld3 | Medical | Monthly Amount - Multiple Changes |
| eld4 | Dental | Monthly Amount - Multiple Changes |
| eld5 | Vision | Monthly Amount - Multiple Changes |
| eld6 | WC | Pcnt of Salary |
| eld7 | Life | Pcnt of Salary |
| eld8 | Pension | Pcnt-Salary-Capped |
| eld9 | 401k | Pcnt-Salary-Capped |
| eld10 | Car Allowance | Monthly Amount |
| eld11 | Phone Allowance | Monthly Amount |
| eld12 | Continuing Education | Input Annual |
| eld13 | Bonus Amount | Single Pymt - Amount |
| eld14 | Bonus Type | Input Annual - Weighted Quarterly |
| eld15 | | Not Set |



Click on CalcType selected for the FICA FieldLabel.

In this example, we have selected Pcnt-TotalTaxable-Capped.

10 Selected Duplicate Definitions

Hourly Staffing Field Mapping

| FieldLabel | CalcType | Object |
|------------|-----------------------------------|--------|
| FICA | Pcnt-TotalTaxable-Capped | 170 |
| Medicare | Tax Liability | 5170 |
| Medical | Monthly Amount - Multiple Changes | 5160 |
| Dental | Monthly Amount - Multiple Changes | 5160 |



Now enter the OptionName, Tax Rate, WageLimit and Max for FICA.

See example.

11

| OptionName | Tax Rate | WageLimit | Max |
|------------|----------|-----------|------|
| FICA | 6.2 | 127500 | 7905 |
| * | | | |

12

Click on CalcType selected for the **Medicare** FieldLabel.

In this example, we have selected **Tax Liability**.

| FieldLabel | CalcType | Object |
|------------|-----------------------------------|--------|
| FICA | Pcnt-TotalTaxable-Capped | 5170 - |
| Medicare | Tax Liability | 5170 - |
| Medical | Monthly Amount - Multiple Changes | 5160 - |
| Dental | Monthly Amount - Multiple Changes | 5160 - |
| Vision | Monthly Amount - Multiple Changes | 5160 - |

13

Enter the OptionName and OptionValue for **Medicare**.

See example.

| OptionName | Option Value | Object | IsDefault |
|------------|--------------|--------|-----------|
| Medicare | 1.45 | | |
| * | | | |

14

Click on CalcType selected for the **Medical** FieldLabel.

In this example, we have selected **Monthly Amount - Multiple Changes**.

| FieldLabel | CalcType | Object |
|------------|-----------------------------------|--------|
| FICA | Pcnt-TotalTaxable-Capped | 5170 - |
| Medicare | Tax Liability | 5170 - |
| Medical | Monthly Amount - Multiple Changes | 5160 - |
| Dental | Monthly Amount - Multiple Changes | 5160 - |
| Vision | Monthly Amount - Multiple Changes | 5160 - |
| WC | Pcnt of Salary | |

Enter the OptionName and Period Amount for **Medical**.

See example.

15

| | OptionName | Period Amount | Object | New Amount |
|---|------------|---------------|--------|------------|
| ▶ | HMO-EMP | 500 | ▼ | |
| | HMO-EMP | 650 | ▼ | |
| | HMO-CH | 650 | ▼ | |
| | HMO-FAM | 1300 | ▼ | |
| | PPO-EMP | 600 | ▼ | |
| | PPO-SP | 750 | ▼ | |
| | PPO-CH | 750 | ▼ | |
| | PPO-FAM | 1400 | ▼ | |
| | Opt Out | 0 | ▼ | |
| * | | | ▼ | |

Click on CalcType selected for the **Dental** FieldLabel.

In this example, we have selected **Monthly Amount - Multiple Changes**.

16

| | | | |
|----------|-----------------------------------|---|------|
| FICA | Pcnt-TotalTaxable-Capped | ▼ | 5170 |
| Medicare | Tax Liability | ▼ | 5170 |
| Medical | Monthly Amount - Multiple Changes | ▼ | 5160 |
| Dental | Monthly Amount - Multiple Changes | ▼ | 5160 |
| Vision | Monthly Amount - Multiple Changes | ▼ | 5160 |
| WC | Pcnt of Salary | ▼ | |
| Life | Pcnt of Salary | ▼ | 5150 |

Enter the OptionName and Period Amount for **Dental**.

See example.

17

| | OptionName | Period Amount | Object | New Amount |
|---|------------|---------------|--------|------------|
| ▶ | Yes | 85 | ▼ | |
| | No | Yes 0 | ▼ | |
| * | | | ▼ | |

| <p>18</p> <p>Click on CalcType selected for the Vison FieldLabel.</p> <p>In this example, we have selected Monthly Amount - Multiple Changes.</p> | <table border="1"> <tr><td>Medicare</td><td>Tax Liability</td><td>▼</td><td>5170</td></tr> <tr><td>Medical</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>Dental</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>Vision</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>WC</td><td>Pcnt of Salary</td><td>▼</td><td></td></tr> <tr><td>Life</td><td>Pcnt of Salary</td><td>▼</td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td>▼</td><td>5150</td></tr> </table> | Medicare | Tax Liability | ▼ | 5170 | Medical | Monthly Amount - Multiple Changes | ▼ | 5160 | Dental | Monthly Amount - Multiple Changes | ▼ | 5160 | Vision | Monthly Amount - Multiple Changes | ▼ | 5160 | WC | Pcnt of Salary | ▼ | | Life | Pcnt of Salary | ▼ | 5150 | 401k Match | Pcnt-Salary-Capped | ▼ | 5150 |
|---|--|----------------|-----------------------------------|----------------|--------|----------|-----------------------------------|-----|------|--------|-----------------------------------|---|------|--------|-----------------------------------|---|------|------|----------------|---|------|------------|--------------------|---|------|-------------------|--------------------|---|------|
| Medicare | Tax Liability | ▼ | 5170 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Medical | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dental | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Vision | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| WC | Pcnt of Salary | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Life | Pcnt of Salary | ▼ | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | ▼ | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>19</p> <p>Enter the OptionName and Period Amount for Vision.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th></th> <th>OptionName</th> <th>Period Amount</th> <th>Object</th> <th>Net Am 1</th> </tr> </thead> <tbody> <tr> <td>▶</td> <td>Yes</td> <td>15</td> <td>▼</td> <td></td> </tr> <tr> <td></td> <td>No</td> <td>0</td> <td>▼</td> <td></td> </tr> <tr> <td>*</td> <td></td> <td></td> <td>▼</td> <td></td> </tr> </tbody> </table> | | OptionName | Period Amount | Object | Net Am 1 | ▶ | Yes | 15 | ▼ | | | No | 0 | ▼ | | * | | | ▼ | | | | | | | | | |
| | OptionName | Period Amount | Object | Net Am 1 | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ | Yes | 15 | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | No | 0 | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>20</p> <p>Click on CalcType selected for the WC FieldLabel.</p> <p>In this example, we have selected Pcnt of Salary.</p> | <table border="1"> <tr><td>Medical</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>Dental</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>Vision</td><td>Monthly Amount - Multiple Changes</td><td>▼</td><td>5160</td></tr> <tr><td>WC</td><td>Pcnt of Salary</td><td>▼</td><td></td></tr> <tr><td>Life</td><td>Pcnt of Salary</td><td>▼</td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td>▼</td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td>▼</td><td>5150</td></tr> </table> | Medical | Monthly Amount - Multiple Changes | ▼ | 5160 | Dental | Monthly Amount - Multiple Changes | ▼ | 5160 | Vision | Monthly Amount - Multiple Changes | ▼ | 5160 | WC | Pcnt of Salary | ▼ | | Life | Pcnt of Salary | ▼ | 5150 | 401k Match | Pcnt-Salary-Capped | ▼ | 5150 | Housing Allowance | Input Monthly | ▼ | 5150 |
| Medical | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dental | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Vision | Monthly Amount - Multiple Changes | ▼ | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| WC | Pcnt of Salary | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Life | Pcnt of Salary | ▼ | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | ▼ | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | ▼ | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>21</p> <p>Enter the OptionName and Percent of Salary for WC.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th></th> <th>OptionName</th> <th>Pcnt of Salary</th> <th>Object</th> <th>IsD</th> </tr> </thead> <tbody> <tr> <td>▶</td> <td>WC</td> <td>0.06</td> <td>▼</td> <td></td> </tr> <tr> <td>*</td> <td></td> <td></td> <td>▼</td> <td></td> </tr> </tbody> </table> | | OptionName | Pcnt of Salary | Object | IsD | ▶ | WC | 0.06 | ▼ | | * | | | ▼ | | | | | | | | | | | | | | |
| | OptionName | Pcnt of Salary | Object | IsD | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ | WC | 0.06 | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | ▼ | | | | | | | | | | | | | | | | | | | | | | | | | | |

| <p>22</p> <p>Click on CalcType selected for the Life FieldLabel.</p> <p>In this example, we have selected Pcnt of Salary.</p> | <table border="1"> <tr><td>Dental</td><td>Monthly Amount - Multiple Changes</td><td>5160</td></tr> <tr><td>Vision</td><td>Monthly Amount - Multiple Changes</td><td>5160</td></tr> <tr><td>WC</td><td>Pcnt of Salary</td><td></td></tr> <tr><td>Life</td><td>Pcnt of Salary</td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td>5150</td></tr> <tr><td>Car Allowance</td><td>Monthly Amount</td><td>5150</td></tr> </table> | Dental | Monthly Amount - Multiple Changes | 5160 | Vision | Monthly Amount - Multiple Changes | 5160 | WC | Pcnt of Salary | | Life | Pcnt of Salary | 5150 | 401k Match | Pcnt-Salary-Capped | 5150 | Housing Allowance | Input Monthly | 5150 | Car Allowance | Monthly Amount | 5150 | | | | | | | | | |
|---|---|----------------|-----------------------------------|----------------|-----------|-----------------------------------|------|------|----------------|--------|------------|--------------------|------|-------------------|--------------------|------|-------------------|----------------|------|-----------------|----------------|------|---|---|--------|------|---|--|--|--|--|
| Dental | Monthly Amount - Multiple Changes | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Vision | Monthly Amount - Multiple Changes | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| WC | Pcnt of Salary | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Life | Pcnt of Salary | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>23</p> <p>Enter the OptionName and Pcnt of Salary for Life.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th></th> <th>OptionName</th> <th>Pcnt of Salary</th> <th>Object</th> <th>IsD</th> </tr> </thead> <tbody> <tr> <td>▶</td> <td>Life</td> <td>0.01</td> <td></td> <td></td> </tr> <tr> <td>*</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | OptionName | Pcnt of Salary | Object | IsD | ▶ | Life | 0.01 | | | * | | | | | | | | | | | | | | | | | | | |
| | OptionName | Pcnt of Salary | Object | IsD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ | Life | 0.01 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>24</p> <p>Click on CalcType selected for the 401K Match FieldLabel.</p> <p>In this example, we have selected Pcnt-Salary-Capped.</p> | <table border="1"> <tr><td>Vision</td><td>Monthly Amount - Multiple Changes</td><td>5160</td></tr> <tr><td>WC</td><td>Pcnt of Salary</td><td></td></tr> <tr><td>Life</td><td>Pcnt of Salary</td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td>5150</td></tr> <tr><td>Car Allowance</td><td>Monthly Amount</td><td>5150</td></tr> <tr><td>Phone Allowance</td><td>Monthly Amount</td><td>5150</td></tr> </table> | Vision | Monthly Amount - Multiple Changes | 5160 | WC | Pcnt of Salary | | Life | Pcnt of Salary | 5150 | 401k Match | Pcnt-Salary-Capped | 5150 | Housing Allowance | Input Monthly | 5150 | Car Allowance | Monthly Amount | 5150 | Phone Allowance | Monthly Amount | 5150 | | | | | | | | | |
| Vision | Monthly Amount - Multiple Changes | 5160 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| WC | Pcnt of Salary | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Life | Pcnt of Salary | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>25</p> <p>Enter the OptionName and Pcnt of Salary for 401k Match.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th></th> <th>OptionName</th> <th>Pcnt of Salary</th> <th>WageLimit</th> <th>Max Amt</th> </tr> </thead> <tbody> <tr> <td>▶</td> <td>1</td> <td>1</td> <td>200000</td> <td>2000</td> </tr> <tr> <td></td> <td>2</td> <td>2</td> <td>200000</td> <td>4000</td> </tr> <tr> <td></td> <td>3</td> <td>3</td> <td>200000</td> <td>6000</td> </tr> <tr> <td></td> <td>4</td> <td>4</td> <td>200000</td> <td>8000</td> </tr> <tr> <td>*</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | | OptionName | Pcnt of Salary | WageLimit | Max Amt | ▶ | 1 | 1 | 200000 | 2000 | | 2 | 2 | 200000 | 4000 | | 3 | 3 | 200000 | 6000 | | 4 | 4 | 200000 | 8000 | * | | | | |
| | OptionName | Pcnt of Salary | WageLimit | Max Amt | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ | 1 | 1 | 200000 | 2000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 2 | 2 | 200000 | 4000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 3 | 3 | 200000 | 6000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 4 | 4 | 200000 | 8000 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| <p>26</p> <p>Click on CalcType selected for the Housing Allowance FieldLabel.</p> <p>In this example, we have selected Input-Monthly.</p> | <table border="1"> <tr><td>WC</td><td>Pcnt of Salary</td><td></td><td></td></tr> <tr><td>Life</td><td>Pcnt of Salary</td><td></td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td></td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td></td><td>5150</td></tr> <tr><td>Car Allowance</td><td>Monthly Amount</td><td></td><td>5150</td></tr> <tr><td>Phone Allowance</td><td>Monthly Amount</td><td></td><td>5150</td></tr> <tr><td>Continuing Education</td><td>Input Annual</td><td></td><td>5150</td></tr> </table> | WC | Pcnt of Salary | | | Life | Pcnt of Salary | | 5150 | 401k Match | Pcnt-Salary-Capped | | 5150 | Housing Allowance | Input Monthly | | 5150 | Car Allowance | Monthly Amount | | 5150 | Phone Allowance | Monthly Amount | | 5150 | Continuing Education | Input Annual | | 5150 |
|---|---|--------------|--------------------|--------------|--------|-------------------|--------------------|--------------|------|-------------------|--------------------|--|-------------|--------------------------|-----------------------|--|------|----------------------|----------------|--|------|----------------------|--------------------------------------|--|------|----------------------|--------------------------------------|--|------|
| WC | Pcnt of Salary | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Life | Pcnt of Salary | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Continuing Education | Input Annual | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>27</p> <p>Click on CalcType selected for the Car Allowance FieldLabel.</p> <p>In this example, we have selected Monthly Amount.</p> | <table border="1"> <tr><td>Life</td><td>Pcnt of Salary</td><td></td><td>5150</td></tr> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td></td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td></td><td>5150</td></tr> <tr><td>Car Allowance</td><td>Monthly Amount</td><td></td><td>150</td></tr> <tr><td>Phone Allowance</td><td>Monthly Amount</td><td></td><td>5150</td></tr> <tr><td>Continuing Education</td><td>Input Annual</td><td></td><td>5150</td></tr> <tr><td>Bonus Amount</td><td>Single Pymt - Pcnt Annualized Salary</td><td></td><td></td></tr> </table> | Life | Pcnt of Salary | | 5150 | 401k Match | Pcnt-Salary-Capped | | 5150 | Housing Allowance | Input Monthly | | 5150 | Car Allowance | Monthly Amount | | 150 | Phone Allowance | Monthly Amount | | 5150 | Continuing Education | Input Annual | | 5150 | Bonus Amount | Single Pymt - Pcnt Annualized Salary | | |
| Life | Pcnt of Salary | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 401k Match | Pcnt-Salary-Capped | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | | 150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Continuing Education | Input Annual | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Amount | Single Pymt - Pcnt Annualized Salary | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>28</p> <p>Enter the OptionName and Option Value for Car Allowance.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th></th> <th>OptionName</th> <th>Option Value</th> <th>Object</th> <th>IsD</th> </tr> </thead> <tbody> <tr><td>▶</td><td>Parking Only</td><td>150</td><td></td><td></td></tr> <tr><td></td><td>Company Use</td><td>1500</td><td></td><td></td></tr> <tr><td></td><td>Exec Lease</td><td>2500</td><td></td><td></td></tr> <tr><td>*</td><td></td><td></td><td></td><td></td></tr> </tbody> </table> | | OptionName | Option Value | Object | IsD | ▶ | Parking Only | 150 | | | | Company Use | 1500 | | | | Exec Lease | 2500 | | | * | | | | | | | |
| | OptionName | Option Value | Object | IsD | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶ | Parking Only | 150 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Company Use | 1500 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Exec Lease | 2500 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>29</p> <p>Click on CalcType selected for the Phone Allowance FieldLabel.</p> <p>In this example, we have selected Monthly Amount.</p> | <table border="1"> <tr><td>401k Match</td><td>Pcnt-Salary-Capped</td><td></td><td>5150</td></tr> <tr><td>Housing Allowance</td><td>Input Monthly</td><td></td><td>5150</td></tr> <tr><td>Car Allowance</td><td>Monthly Amount</td><td></td><td>5150</td></tr> <tr><td>Phone Allowance</td><td>Monthly Amount</td><td></td><td>150</td></tr> <tr><td>Continuing Education</td><td>Input Annual</td><td></td><td>5150</td></tr> <tr><td>Bonus Amount</td><td>Single Pymt - Pcnt Annualized Salary</td><td></td><td></td></tr> <tr><td>Bonus Type</td><td>Input Annual - Weighted Quarterly</td><td></td><td></td></tr> </table> | 401k Match | Pcnt-Salary-Capped | | 5150 | Housing Allowance | Input Monthly | | 5150 | Car Allowance | Monthly Amount | | 5150 | Phone Allowance | Monthly Amount | | 150 | Continuing Education | Input Annual | | 5150 | Bonus Amount | Single Pymt - Pcnt Annualized Salary | | | Bonus Type | Input Annual - Weighted Quarterly | | |
| 401k Match | Pcnt-Salary-Capped | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Housing Allowance | Input Monthly | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | | 150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Continuing Education | Input Annual | | 5150 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Amount | Single Pymt - Pcnt Annualized Salary | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Type | Input Annual - Weighted Quarterly | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| <p>30</p> <p>Enter the OptionName and Option Value for Phone Allowance.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th>OptionName</th> <th>Option Value</th> <th>Object</th> <th>Is</th> </tr> </thead> <tbody> <tr> <td>Yes</td> <td>40</td> <td></td> <td></td> </tr> <tr> <td>▶*</td> <td>0</td> <td></td> <td></td> </tr> </tbody> </table> | OptionName | Option Value | Object | Is | Yes | 40 | | | ▶* | 0 | | | | | | | | | | | | | | |
|---|--|-------------------|----------------|--------------|-----------------|----------------|------|----------------------|----------------|------|----------------------|--------------------------------------|-----|--------------|--------------------------------------|-----|------------|-----------------------------------|----|-----|---------|---|--|--|--|
| OptionName | Option Value | Object | Is | | | | | | | | | | | | | | | | | | | | | | |
| Yes | 40 | | | | | | | | | | | | | | | | | | | | | | | | |
| ▶* | 0 | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>31</p> <p>Click on CalcType selected for the Continuing Education FieldLabel.</p> <p>In this example, we have selected Input Annual.</p> | <table border="1"> <tbody> <tr> <td>Housing Allowance</td> <td>Input Monthly</td> <td>5150</td> </tr> <tr> <td>Car Allowance</td> <td>Monthly Amount</td> <td>5150</td> </tr> <tr> <td>Phone Allowance</td> <td>Monthly Amount</td> <td>5150</td> </tr> <tr> <td>Continuing Education</td> <td>Input Annual</td> <td>150</td> </tr> <tr> <td>Bonus Amount</td> <td>Single Pymt - Pcnt Annualized Salary</td> <td></td> </tr> <tr> <td>Bonus Type</td> <td>Input Annual - Weighted Quarterly</td> <td></td> </tr> <tr> <td></td> <td>Not Set</td> <td></td> </tr> </tbody> </table> | Housing Allowance | Input Monthly | 5150 | Car Allowance | Monthly Amount | 5150 | Phone Allowance | Monthly Amount | 5150 | Continuing Education | Input Annual | 150 | Bonus Amount | Single Pymt - Pcnt Annualized Salary | | Bonus Type | Input Annual - Weighted Quarterly | | | Not Set | | | | |
| Housing Allowance | Input Monthly | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Car Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Continuing Education | Input Annual | 150 | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Amount | Single Pymt - Pcnt Annualized Salary | | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Type | Input Annual - Weighted Quarterly | | | | | | | | | | | | | | | | | | | | | | | | |
| | Not Set | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>32</p> <p>Click on CalcType selected for the Bonus Amount FieldLabel.</p> <p>In this example, we have selected Single Pymt-Pcnt Annualized Salary.</p> | <table border="1"> <tbody> <tr> <td>Car Allowance</td> <td>Monthly Amount</td> <td>5150</td> </tr> <tr> <td>Phone Allowance</td> <td>Monthly Amount</td> <td>5150</td> </tr> <tr> <td>Continuing Education</td> <td>Input Annual</td> <td>5150</td> </tr> <tr> <td>Bonus Amount</td> <td>Single Pymt - Pcnt Annualized Salary</td> <td></td> </tr> <tr> <td>Bonus Type</td> <td>Input Annual - Weighted Quarterly</td> <td></td> </tr> <tr> <td></td> <td>Not Set</td> <td></td> </tr> <tr> <td></td> <td>Not Set</td> <td></td> </tr> </tbody> </table> | Car Allowance | Monthly Amount | 5150 | Phone Allowance | Monthly Amount | 5150 | Continuing Education | Input Annual | 5150 | Bonus Amount | Single Pymt - Pcnt Annualized Salary | | Bonus Type | Input Annual - Weighted Quarterly | | | Not Set | | | Not Set | | | | |
| Car Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Phone Allowance | Monthly Amount | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Continuing Education | Input Annual | 5150 | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Amount | Single Pymt - Pcnt Annualized Salary | | | | | | | | | | | | | | | | | | | | | | | | |
| Bonus Type | Input Annual - Weighted Quarterly | | | | | | | | | | | | | | | | | | | | | | | | |
| | Not Set | | | | | | | | | | | | | | | | | | | | | | | | |
| | Not Set | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>33</p> <p>Enter the OptionName, Pcnt of Salary and Fiscal Period for Bonus Amount.</p> <p>See example.</p> | <table border="1"> <thead> <tr> <th>OptionName</th> <th>Pcnt of Salary</th> <th>FiscalPeriod</th> <th>Object</th> </tr> </thead> <tbody> <tr> <td>▶ 1</td> <td>1</td> <td>Jan</td> <td></td> </tr> <tr> <td>2</td> <td>2</td> <td>Jan</td> <td></td> </tr> <tr> <td>5</td> <td>5</td> <td>Jan</td> <td></td> </tr> <tr> <td>10</td> <td>10</td> <td>Jan</td> <td></td> </tr> <tr> <td>* </td> <td></td> <td></td> <td></td> </tr> </tbody> </table> | OptionName | Pcnt of Salary | FiscalPeriod | Object | ▶ 1 | 1 | Jan | | 2 | 2 | Jan | | 5 | 5 | Jan | | 10 | 10 | Jan | | * | | | |
| OptionName | Pcnt of Salary | FiscalPeriod | Object | | | | | | | | | | | | | | | | | | | | | | |
| ▶ 1 | 1 | Jan | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | 2 | Jan | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | 5 | Jan | | | | | | | | | | | | | | | | | | | | | | | |
| 10 | 10 | Jan | | | | | | | | | | | | | | | | | | | | | | | |
| * | | | | | | | | | | | | | | | | | | | | | | | | | |

Click on CalcType selected for the Bonus Type FieldLabel.

In this example, we have selected Input Annual-Weighted Quarterly.

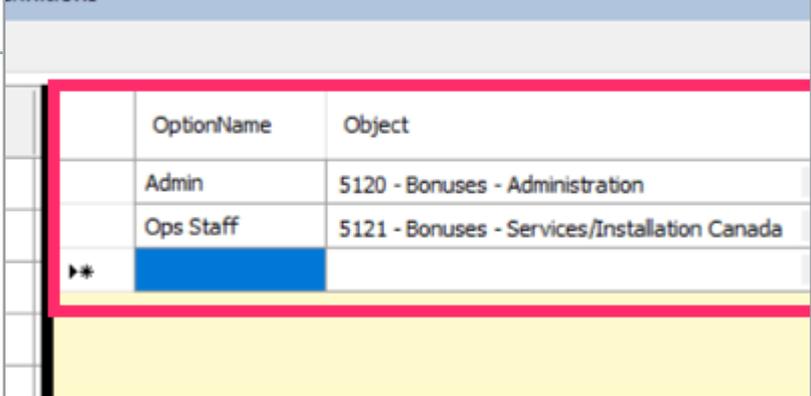
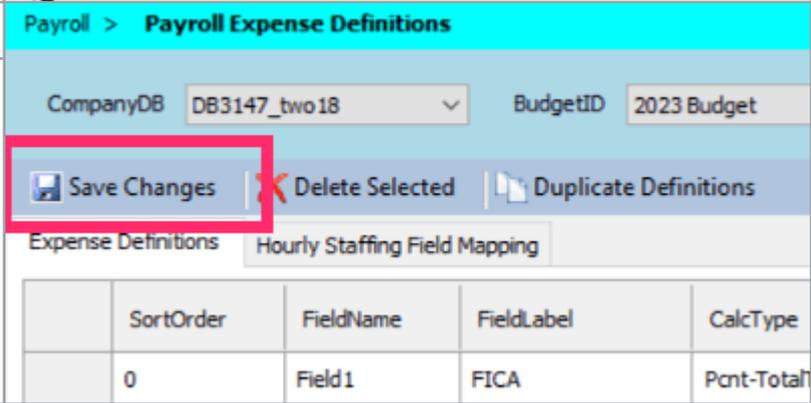
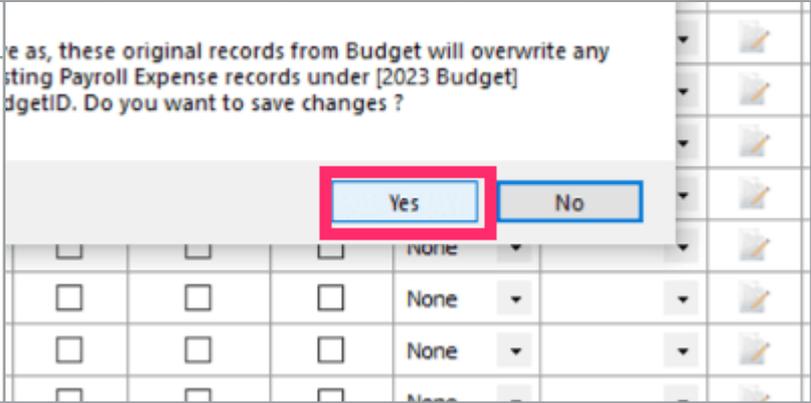
34

| | | | |
|----------------------|--------------------------------------|---|------|
| Phone Allowance | Monthly Amount | ▼ | 5150 |
| Continuing Education | Input Annual | ▼ | 5150 |
| Bonus Amount | Single Pymt - Post Annualized Salary | ▼ | |
| Bonus Type | Input Annual - Weighted Quarterly | ▼ | |
| | Not Set | ▼ | |
| | Not Set | ▼ | |
| | Not Set | ▼ | |

Drag the black line to the left.

35

| | Object | | OptionName | Object |
|----------|----------------------------|---|------------|---------------|
| ▼ | 5170 - Payroll Taxes - Adm | ▶ | min | 5120 - Bonuse |
| ▼ | 5170 - Payroll Taxes - Adm | | s Staff | 5121 - Bonuse |
| anges ▼ | 5160 - Health Insurance Ex | * | | |
| anges ▼ | 5160 - Health Insurance Ex | | | |
| anges ▼ | 5160 - Health Insurance Ex | | | |
| ▼ | | | | |
| ▼ | 5150 - Employee Benefits - | | | |
| ▼ | 5150 - Employee Benefits - | | | |
| ▼ | 5150 - Employee Benefits - | | | |
| ▼ | 5150 - Employee Benefits - | | | |
| ▼ | 5150 - Employee Benefits - | | | |
| ▼ | 5150 - Employee Benefits - | | | |
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| <p>36</p> <p>Enter the OptionName, Object, 1st Rate, 1st Period, 2nd Rate, 2nd Period, 3rd Rate, 3rd Period, 4th Rate, 4th Period for Bonus Type.</p> <p>See example.</p> |  |
| <p>37</p> <p>Click on CalcType selected for the Bonus Type FieldLabel.</p> <p>In this example, we have selected Input Annual-Weighted Quarterly.</p> |  |
| <p>38</p> <p>Click on Yes to confirm you want to save these records.</p> <p>Note: You are overwriting any existing payroll records for this budgetid.</p> |  |
| <p>39</p> <p>That's It. You're Done.</p> |  |