Heartland

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Payroll Export to Heartland PlusOne

The following document illustrates how to configure CRE/RPE to generate payroll data in a .txt file for export.

When choosing to go with an integrated payroll solution such as Heartland PlusOne you will no longer have to manually enter all of your payroll data into a third party software. Just simply export your data from Cash Register Express's Payroll screen and then import directly into Heartland PlusOne

****NOTE**: Before using this document to configure CRE to export payroll information for Heartland Plus One, you must have your **Company Identifier, Earning Codes, and Department Code** provided by Heartland.

This document will cover how to setup the Overtime calculation, how to setup payroll codes for individual employees or job codes, and how to export the payroll information.

The following is included with this export:

Overtime Wages Earned

Commissions

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Important Notes:

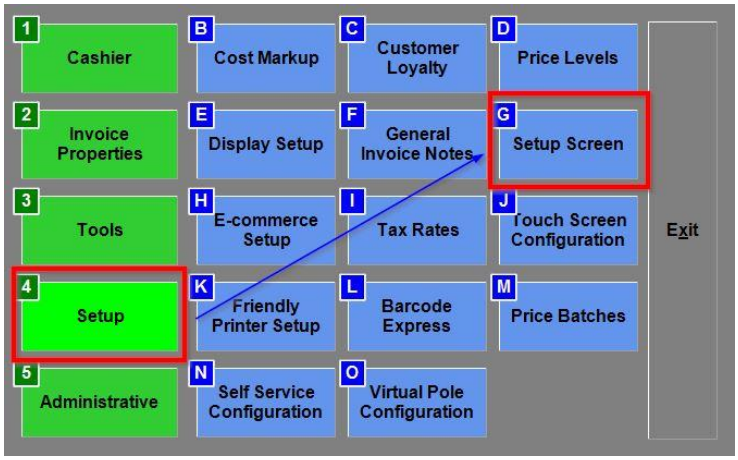
As of CRE version **12.8023 and newer**, you must select the **payroll export type** from the **payroll settings** tab under **System Access** in the **Setup Screen.** Previous versions of CRE require you to select the payroll export type from **System Access** in the **Setup Screen**

Revision History

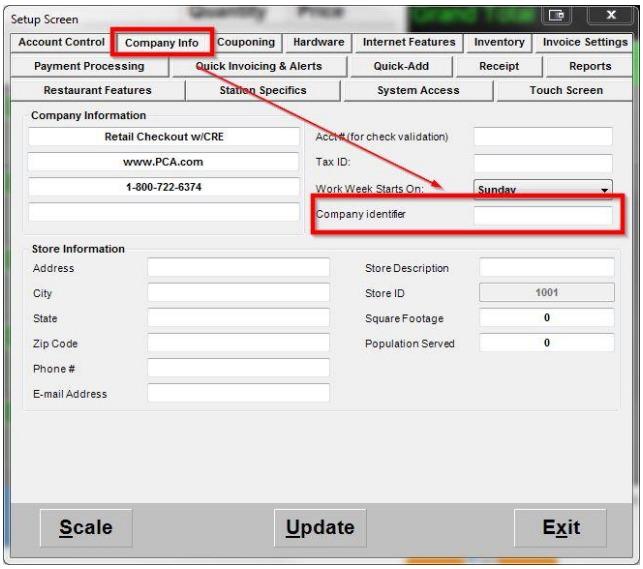
Document Version	Date	Author	Description of Changes
1.3	November 17, 2017	MP	Added steps for choosing the **Payroll Export type** from the payroll settings tab in the configuring Weekly overtime and Daily overtime Sections.

Configuring settings with weekly overtime calculation

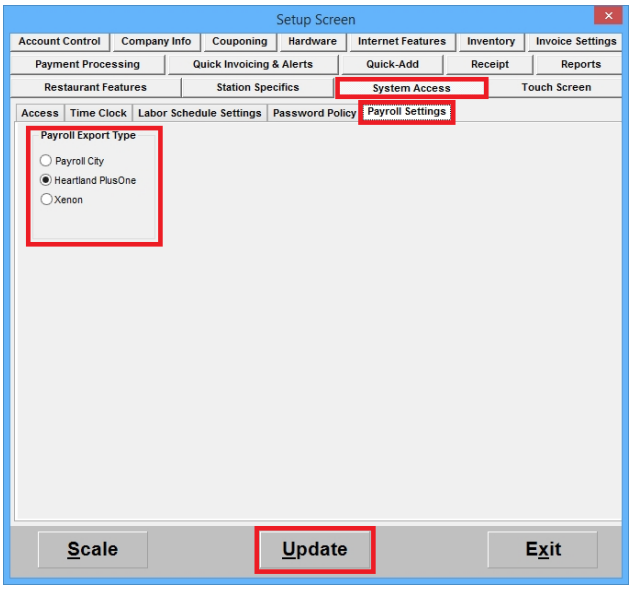
If you want to calculate overtime on a **weekly** basis follow the steps below, if you want calculate overtime on a **daily** basis click here to be brought to the appropriate section.



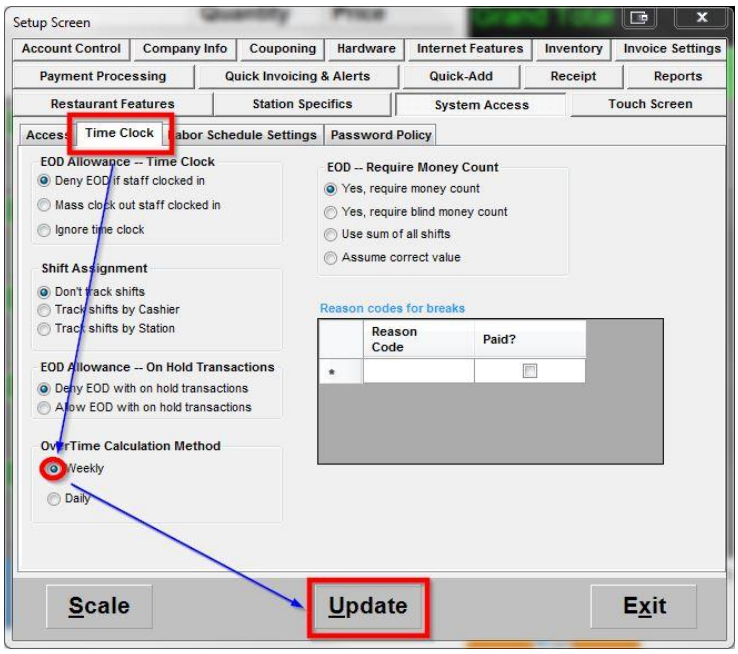
1. At the Options/Manager screen go to **Setup > Setup Screen**.



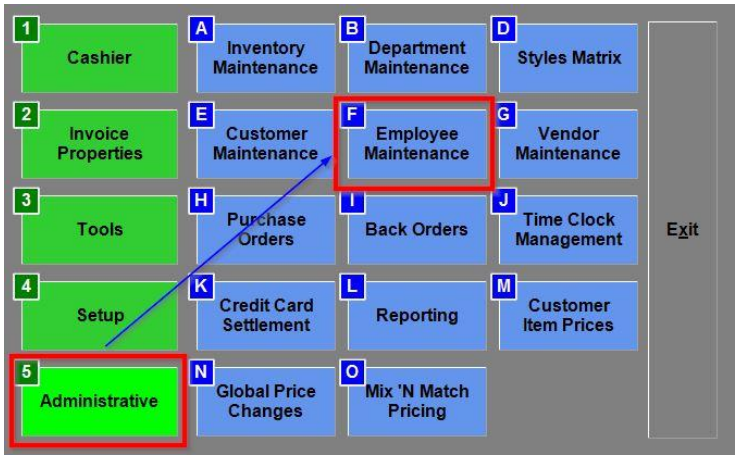
2. Under the **Company Info** tab enter the **Company Identifier** (issued by Heartland).



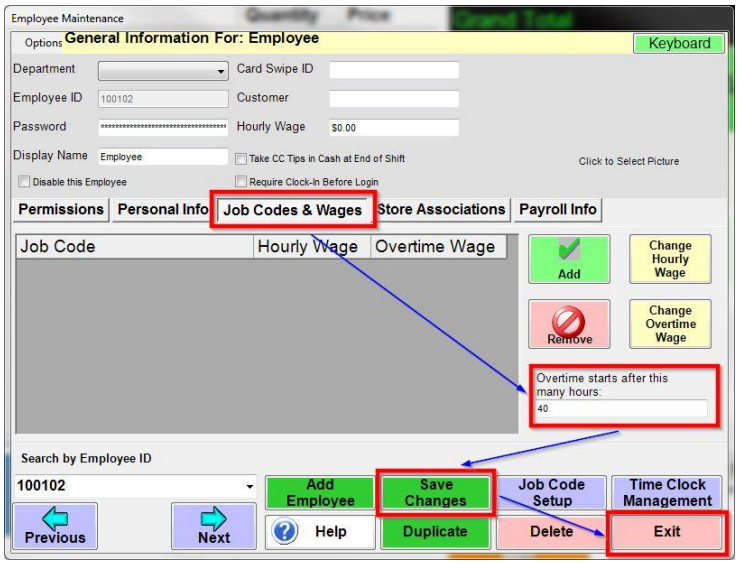
3. Select **System Access**
4. Select **Payroll Settings**
5. Under the **Payroll Export Type** section, select **Heartland PlusOne**
6. Select **Update**



7. Under the **Time Clock tab**, for **OverTime Calculation Method**, select the **Weekly** radio button, then click on **Update** to save your changes.



8. Go to **Administrative** > **Employee Maintenance**.

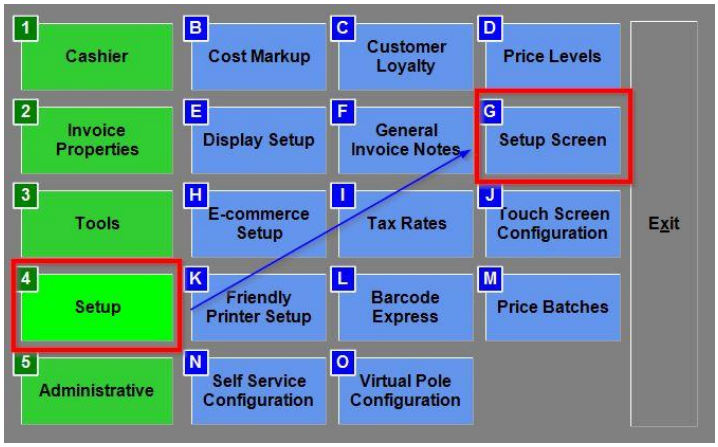


9. Click on the **Job Codes & Wages** tab. Under **Overtime start after this many hours**, enter **40** (or however many hours constitutes your work week). Click on **Save Changes**, then **Exit**.

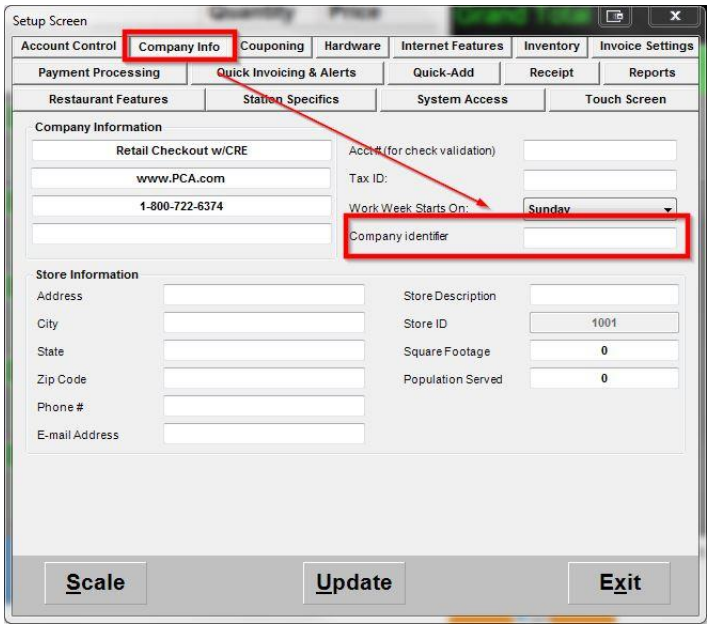
Now that you've setup on for a weekly basis click here to continue to the next step. Pages 5 & 6 show how to setup the overtime calculation for a **daily** basis and can be skipped.

Configuring settings with Daily overtime calculation

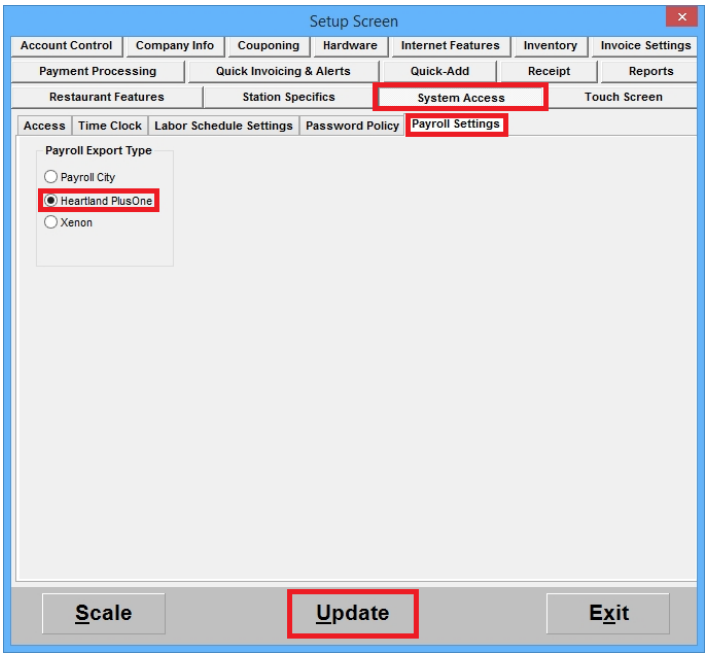
If you want to calculate overtime on a **daily** basis follow the steps below.



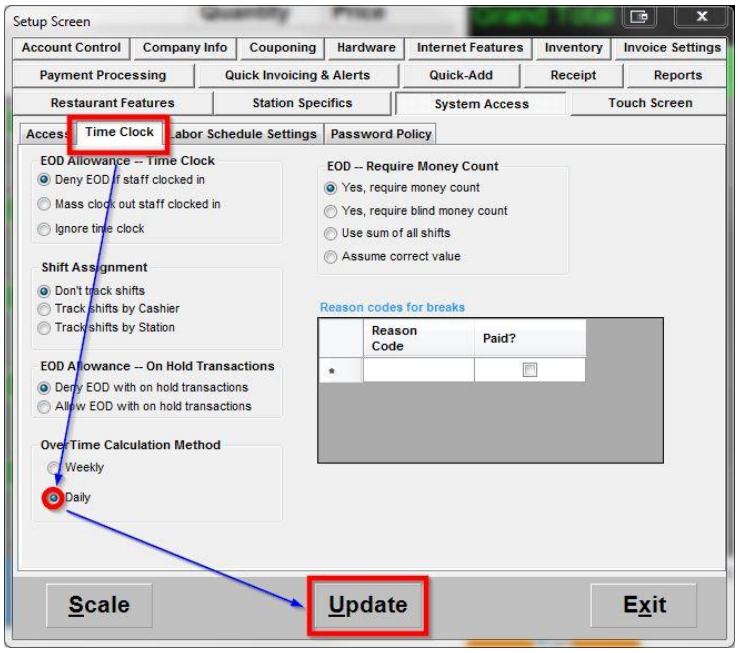
1. At the Options/Manager screen go to **Setup > Setup Screen**.



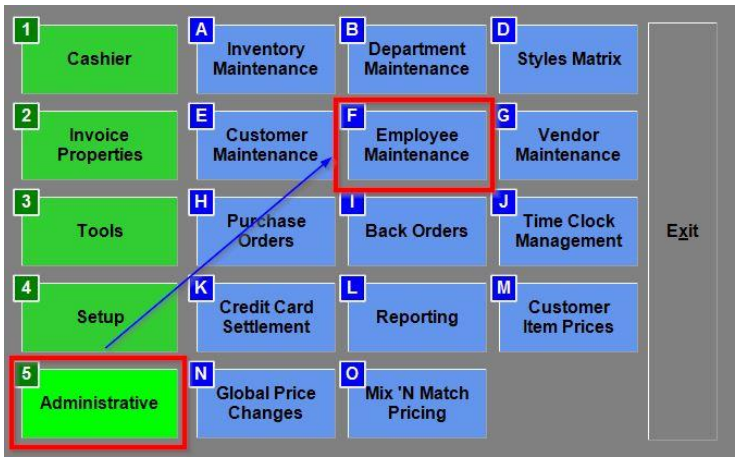
2. Under the **Company Info** tab enter the **Company Identifier** (issued by Heartland).



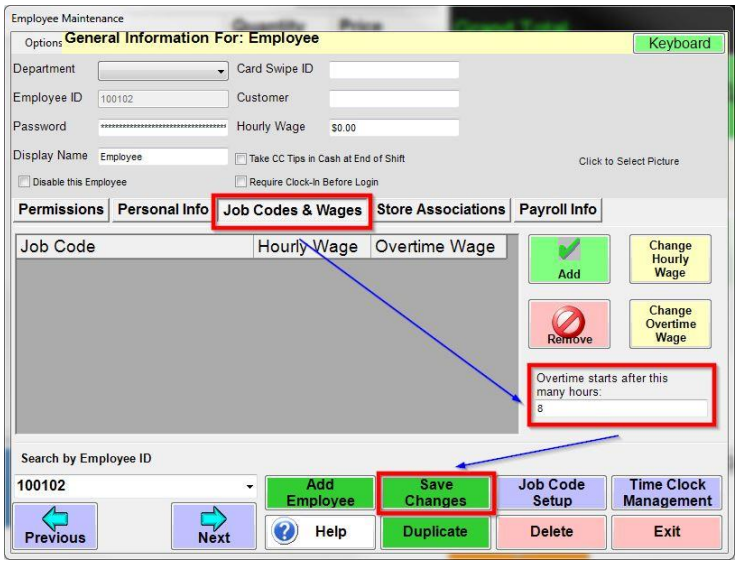
3. Under the **System Access** tab, for **Payroll Export Type** select the **Heartland PlusOne** radio button.



4. Under the **Time Clock tab**, for **OverTime Calculation Method**, select the **Daily** radio button, then click on **Update** to save your changes.

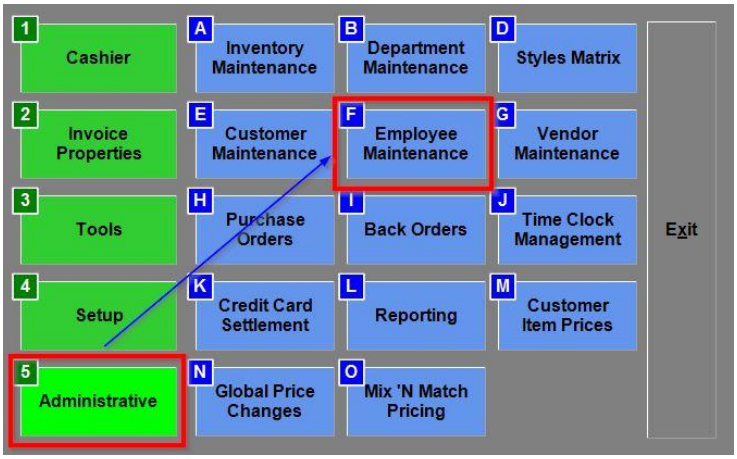


5. Go to **Administrative** > **Employee Maintenance**.

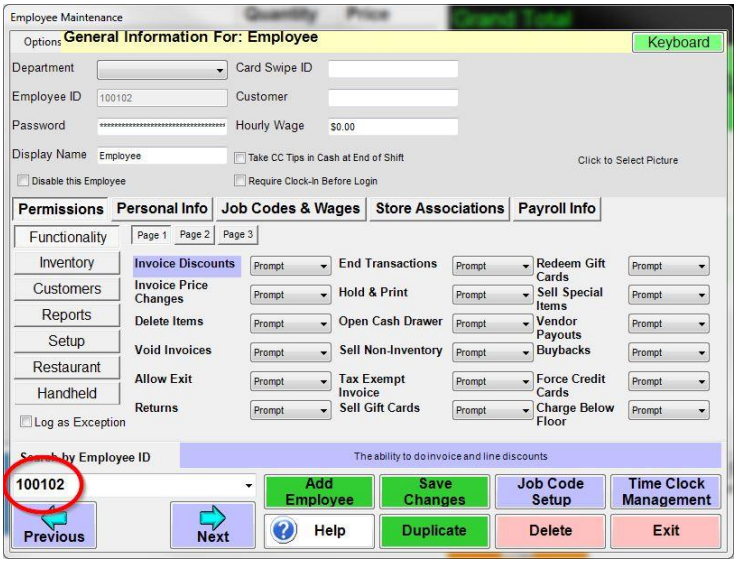


6. Click on the **Job Codes & Wages** tab. Under **Overtime start after this many hours**, enter **8** (or however many hours constitutes your work day). Click on **Save Changes**, then **Exit**.

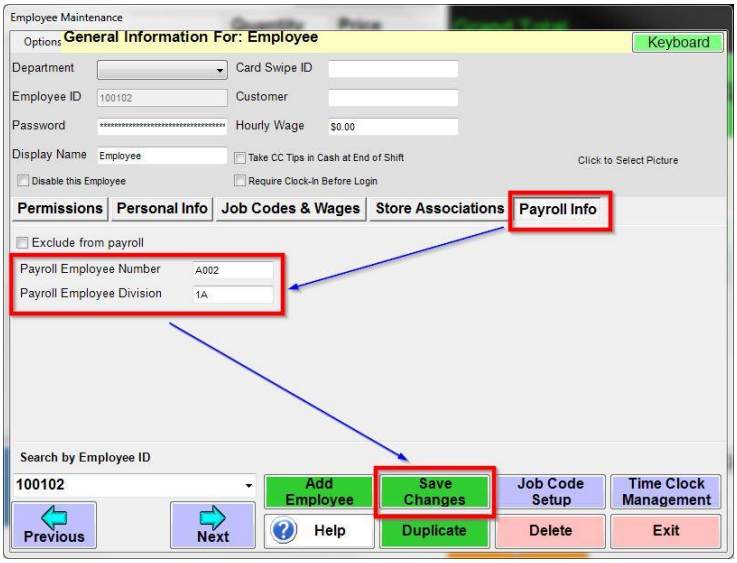
Configuring payroll codes in Employee Maintenance and Job Code Setup



1. At the Options/Manager screen go to **Setup > Setup Screen**.

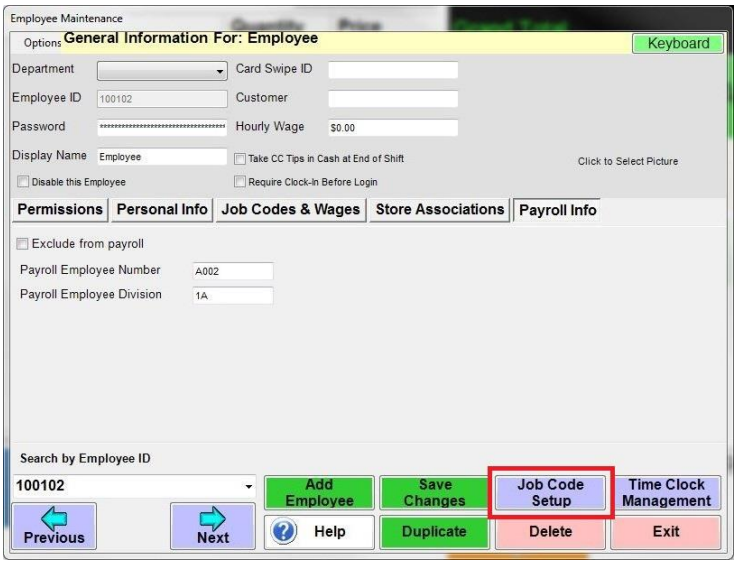


2. Select the Employee from the **Search by Employee ID** drop down.

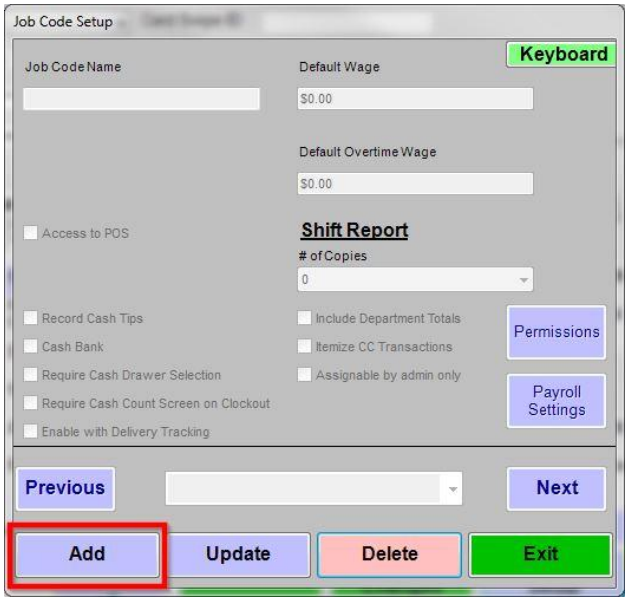


3. Under the **Payroll Info** tab, enter the **Payroll Employee Number** and the **Payroll Employee Division** (issued by Heartland).

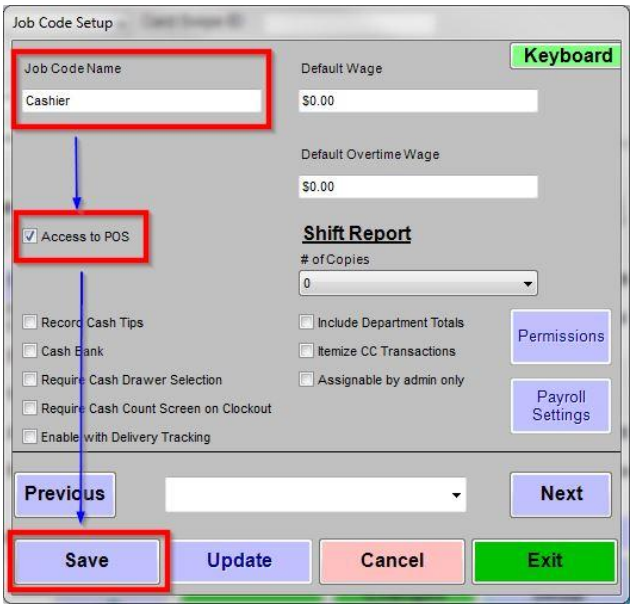
   Click on **Save Changes** to save your settings.



4. Click on **Job Code Setup**.



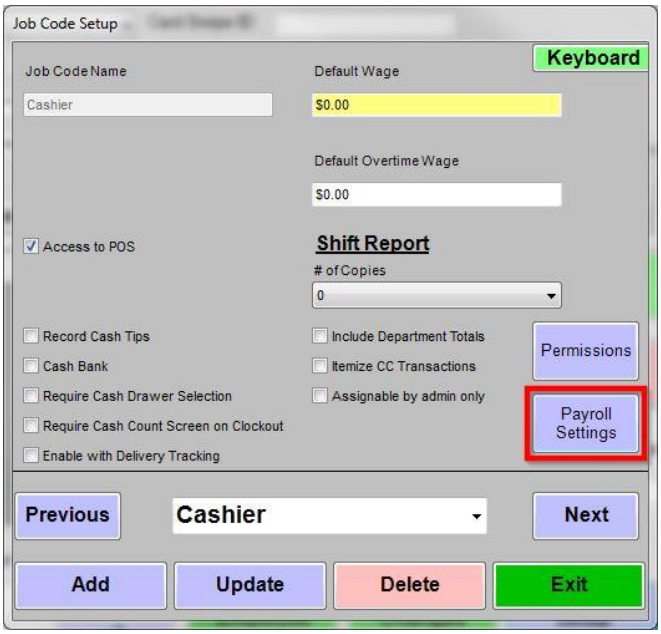
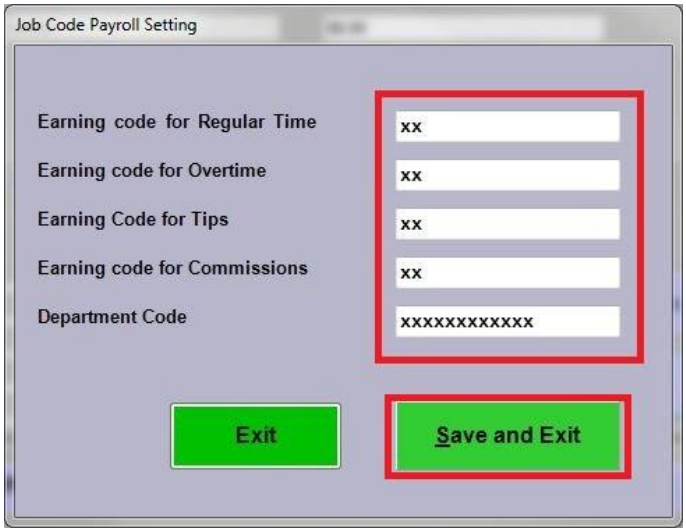
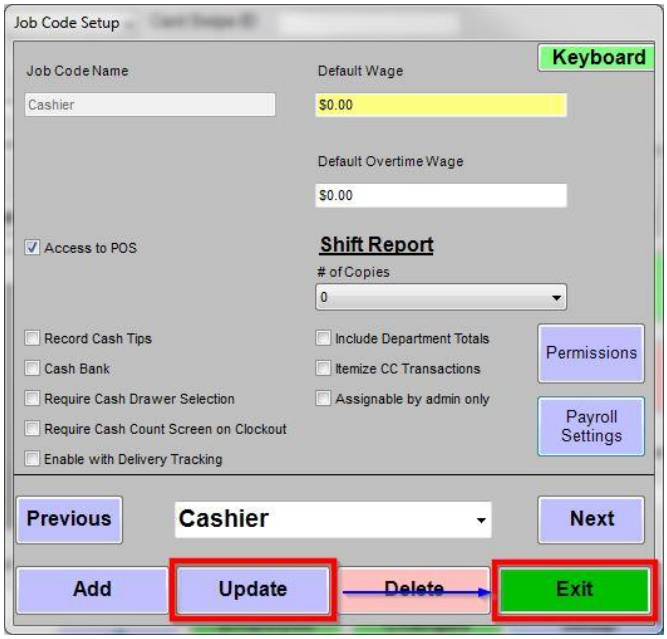
5. Click on Add.

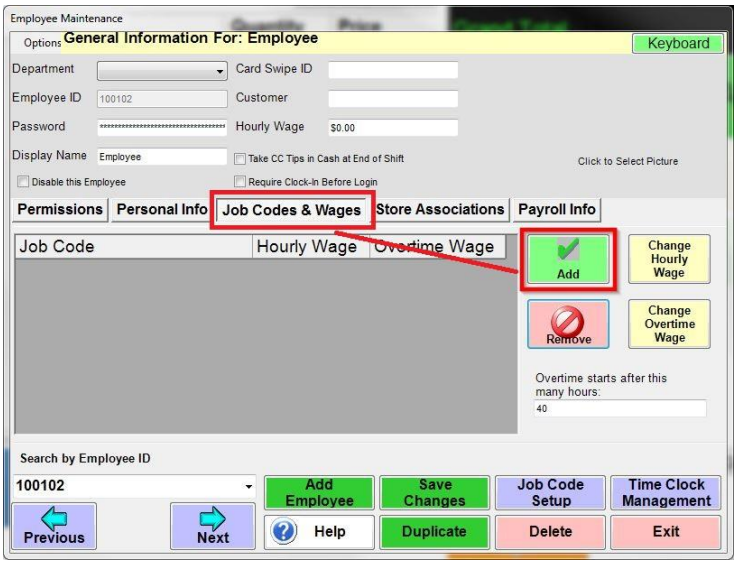


6. Under **Job Code Name**, enter a name for this Job Code, e.g. “Cashier”.

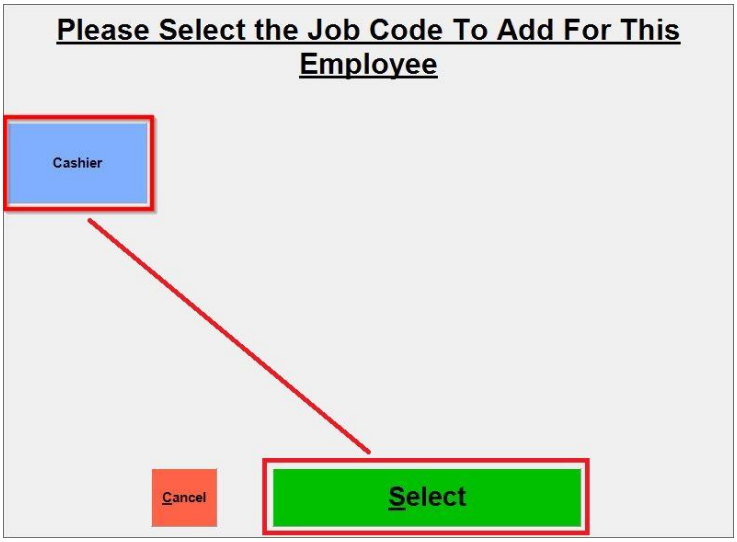
   Put a check in the box for **Access to POS** (if applicable to this Job Code).

   Click on **Save** to accept the changes.

	7. Click on **Payroll Settings**.
	8. Enter all the requested information (issued by Heartland). Afterwards, click on **Save and Exit** to save your changes.
	9. Click on **Update**, then **Exit**.

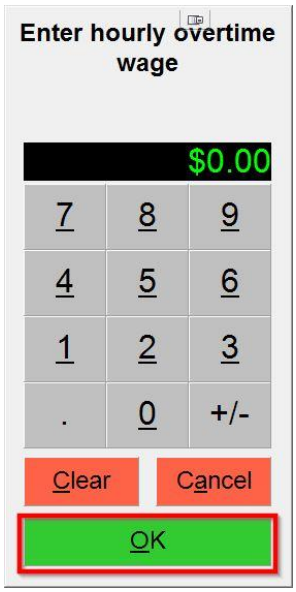
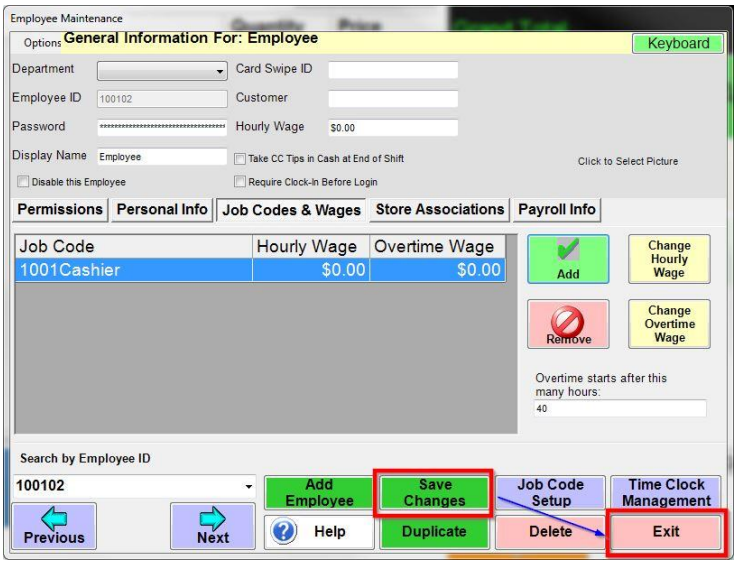


10. Click on the **Job Codes & Wages** tab, then click on **Add**.

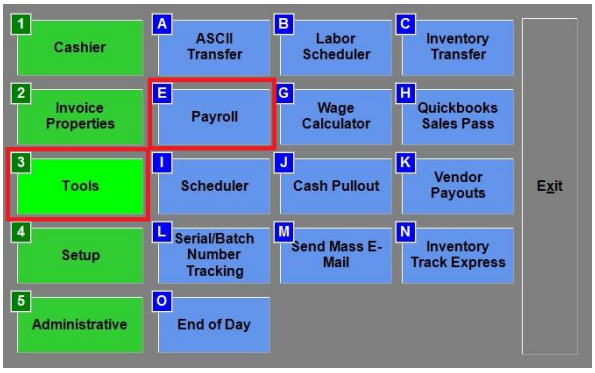


11. Select the Job Code you created earlier you want to assign to this employee, e.g. “Cashier”, then click on **Select**.

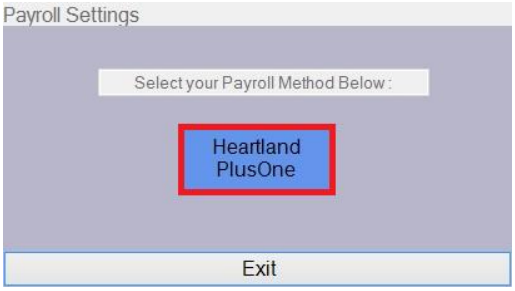
12. Using the number pad, enter the hourly wage for this Job Code, then click **OK**.

	13. Using the number pad, enter the hourly overtime wage for this Job Code, then click **OK**.
	14. Click on **Save Changes**, click on **Exit**.

Performing a Payroll Export

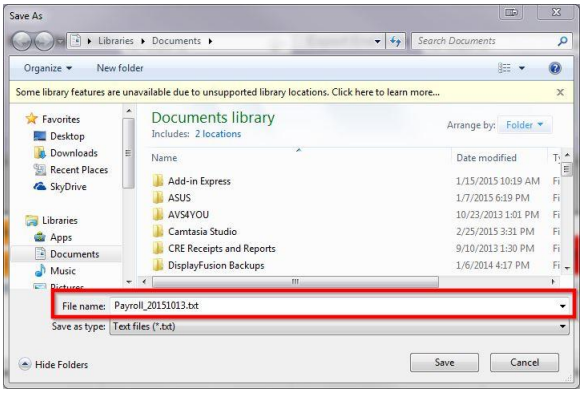


1. At the Options/Manager screen go to **Tools > Payroll**

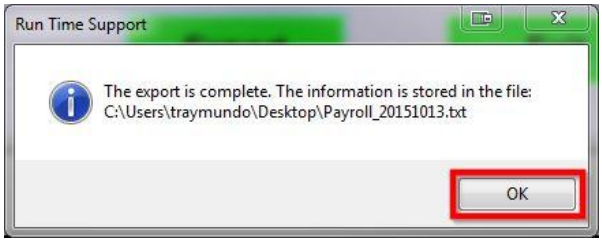


2. Click on **Heartland Plus One**

3. Enter the **Export Start Date** by using the drop down calendar or typing in the date manually with your keyboard.
4. Enter the **Export End Date** by using the drop down calendar or typing in the date manually with your keyboard.
5. Click on **Export**.



6. Name and your payroll file and click **save**.



7. Click on **OK** to close the message once the export has completed.