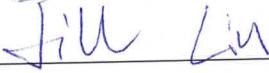
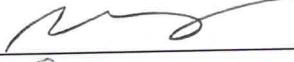


Document Authorization:

	Name	Date	Signature
Owner	Jill Liu	20c2025	
Operation Management	Baozhong Zhao	20c2025	
Quality Assurance	Xibo Li	20c2025	

Changes from previous version:

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ALL	1. New document	

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1. PURPOSE

This document describes the process of setting up a payroll account and running payroll on QuickBooks.

2. SCOPE

Synoligo uses QuickBooks for bookkeeping and payroll processing.

3. INTERNAL REFERENCES

Document ID	Title
QUA001	Quality Policy
ADM003	Employee Handbook

4. EXTERNAL REFERENCES

Document ID	Title

5. RESPONSIBILITIES

Job Function and/or Department	Responsibility
All Personnel	

6. DEFINITION

Term	Definition
QBO	QuickBooks online

7. PROCEDURE

7.1. Add new employee in QBO

7.1.1. Go to **Payroll > Employee > Add an Employee**.

- Enter the employee's name, personal email, and hire date.
- Check **Time Tracking**.
- Select **Employee Self-Onboard with Form I-9**. The employee will then receive an email from QuickBooks to set up their profile.
- Once the employee profile is created, continue setting up employment details:
 - Work location (for remote employees, use their home address)
 - Manager
 - Job title
 - Other relevant details
- Set up the base pay type: hourly or salary.
- Add additional pay types as needed: overtime pay, holiday pay, and bonuses.
- Configure time-off policies:
 - Paid time off: 0.03968 hours per hour worked during the first two years
 - No vacation pay
 - No sick pay
 - Unlimited unpaid time off
- Set up deductions and contributions:
 - For 401(k) and Roth 401(k) combined, the default employee contribution is

3% of gross pay.

- If the employee contributes 3%, the company matches 3%.
- If the employee contributes more than 3%, the company match is capped at 4% of gross pay.
- Add other deductions and contributions as applicable.

7.1.2. Go to **classic QuickBooks time**, then:

- Click **My Team** on the left side
- Select the new employee's name.
- Ensure the permissions for **Mobile Time Entry**, **View "who is working"** for all team member, and **Manage my timesheets** are unchecked.
- Ensure no Customers are assigned under their name.

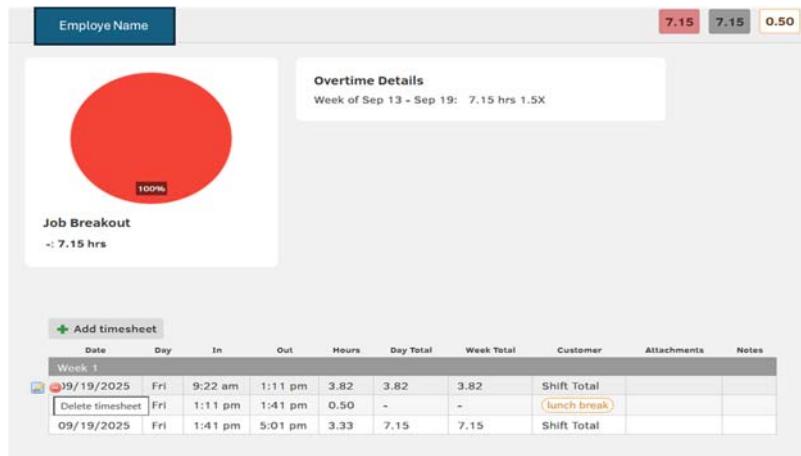
7.1.3. Work with the employees to ensure they can access their QuickBooks Workforce account online or through the mobile app. Provide guidance on how to submit PTO requests within the system. Provide training to hourly employees on how to clock in and out using kiosks.

7.1.4. Perform E-Verify within 3 days and collect Employee Handbook acknowledgement form signature.

7.2. Approve work hours for hourly employees.

7.2.1. After the pay period ends and before the 5th and 20th of each month, open QBO, select the **Time** menu from the navigation panel on left side, then click **Go to classic QuickBooks Time** in the upper right corner.

7.2.2. Select the **Approvals** icon on the left side. From the drop-down menu, choose report dates **By pay period**, then click **Run Report**. Verify each employee's work hours by selecting **View Details**.



7.2.3. Hover the mouse over the date to display the **Edit** or **Delete** icon. For any day where the total hours are not within the range of 7.5–8.5 hours, verify and confirm the hours with the employee and their manager. Any missing days must also be confirmed with the employee and manager, then adjusted accordingly.

7.2.4. Select all employees who need approval, then click the **Approve Selected** icon. Next click the **Export Approved Time** icon.

7.3. QBO payroll processing

7.3.1. Go to QBO **Payroll**, then select **Employee**. Click **Run Payroll** in the upper right corner. All hourly employees' hours will be imported automatically, and all salaried employees' wages are based on the amounts set up in their employee profiles.

7.3.2. Manually add any reimbursement and bonus, if applicable.

7.3.3. Click **Preview Payroll** icon, then **Submit Payroll**.