Setup Step 1 - Preferences

Last Modified on 10/28/2024 1:48 pm EDT

This is the most generic area of the setup and should be looked at first.

□

Enable Geolocation

If this checkbox is checked, you will be able to see on the timesheets where each employee clocked in or out of each paycode on a google map. There is a button next to each time entry on the timesheets that will allow you to see this.

Shift Minute Rounding

This feature will change the display of the clock in and clock out time of your employees. If the 'minute' option is selected, your timesheets will only show whole minute values for your employee's times of clocking in and out. If the 'five minute' option is selected, your timesheets will reflect only five minute increments for clocking in and clocking out despite the time your employees actual clock in or out time. These are rounded to the nearest five minute (ten minute, fifteen minute) increment up or down.

Overtime Calculation

If you calculate overtime with your employees, you should have the allow overtime calculation checkbox checked. You can then enter an overtime factor (1.5 = time and a half). You can also enter a double overtime factor, but this factor will only be applicable if you are calculating daily overtime or consecutive work days overtime. If overtime calculation is based on weekly hours worked, check the 'allow weekly overtime' checkbox and then enter the amount of hours needed to be worked before overtime is paid. If overtime is calculated daily, you will check the 'allow daily overtime' checkbox and then specify how many hours need to be worked in a day before overtime is paid. The hours needed to be worked before double overtime is calculated should be entered too (you will want to make sure there is a double overtime factor entered in the field above). If consecutive work days overtime needs to be calculated, check the 'allow consecutive work days overtime' checkbox. Then enter how many days need to be worked in a row for the next day to be calculated as overtime. You can then enter how many hours on the overtime day need to be clocked before double overtime is paid (you will want to make sure that there is a double overtime factor entered in the field above).

Appointment Defaults

It is preferable that you understand paycodes before looking at this area of the preferences setup.

Dispatch Code

You will want to select the paycode that should be defaulted for technicians when they are dispatching themselves to an appointment on their schedule board.

Arrival Code

You will want to select the paycode that should be defaulted for technicians when they arrive at an appointment on their schedule board.

Payroll Provider & Export

Require Employee Approval: If this checkbox is checked, employees will be given the option to approve their own timesheets at the end of a pay period. They are not required to approve their timesheets though, as even if there are employees who did not approve their own timesheets, this will not stop managers from being able to approve the pay period

Default Payroll Provider: This dropdown controls what the export sheet looks like when you export your payroll. If you do not see your payroll provider in this list, you will want to pick the 'generic payroll export', as this export file provides most of the information necessary for importing to other payroll providers and is a file that can be manipulated to be imported to most payroll providers. If you would like to add your payroll provider to this list, contact us and we can work together with you to add them.

Payroll Company Number: If you are using a generic payroll export, you can leave this field blank. If you are picking a specific payroll provider, you should have already have a payroll company number you can place in this field.

Payroll Notification Job: If this checkbox is checked, at the end of every pay period, an email will be sent to all who need to approve payroll. Managers will always get an email, but employees will only get an email if the 'require employee approval' checkbox is checked.

Trackable Hours Reset Date

This is the date in which PTO and Vacation time reset. Usually this is your company's year-end and is often January first.

Company Preferences Tab

In this tab, you can place your company's pertinent information and add your logo.