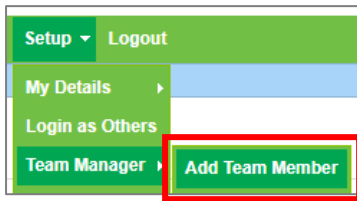
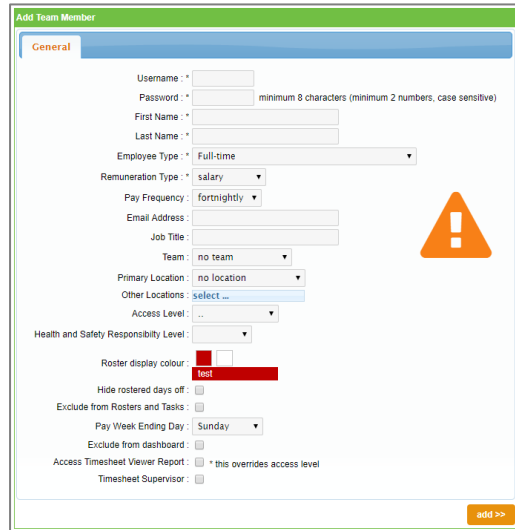


ADDING A CASUAL TEAM MEMBER

1. Hover on *Setup*, hover on *Team Manager*, and click on *Add Team Member*:

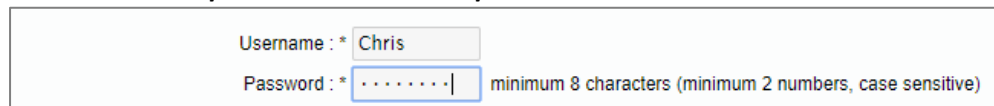


The following screen will appear:

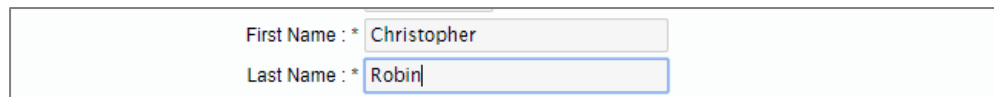


2. Enter in a *Username* and *Password*:

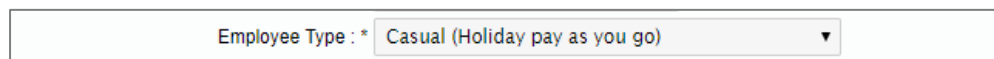
NB: You cannot have the same username for more than one person, and you cannot have the username in the password. Follow the password instructions next to the Password box



3. Enter in a *First Name* and *Last Name*:



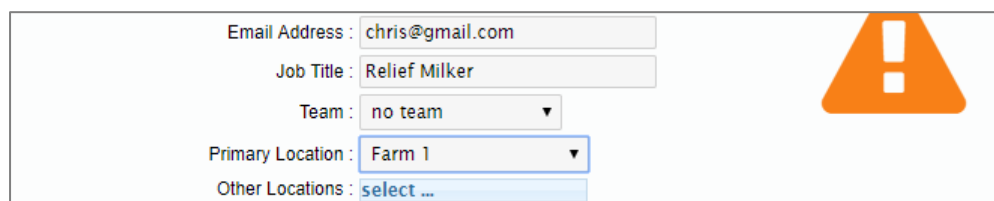
4. Change the *Employee Type* from *Full-Time* to *Casual (Holiday pay as you go)*:



5. Change the *Remuneration Type* and *Pay Frequency* (if applicable):



6. Enter in an *Email Address*, *Job Title*, and *Location(s)* (if applicable):



7. Select an applicable *Access Level* i.e. *Relief Milker*:

NB: If an access level that you want isn't on your licence, please contact us and we can create it for you

Access Level : Relief Milker ▼

8. If you have the Health & Safety module, select an applicable Health & Safety Responsibility Level i.e. *Worker*:

Health and Safety Responsibility Level : worker ▼

9. If the Casual is going to be on the Roster, select a *Roster display colour*. To do this:

NB: Skip this step if they will be excluded from the Roster

Roster display colour : test

Click here to choose the background colour

Click here to choose the text colour

Clicking on either display colour boxes will bring up the following screen:



To bring up more colours, click on the circled area below:



This will bring up the following screen:



Select your desired colours.

10. Tick any of the following boxes if they apply:

Hide rostered days off :

Exclude from Rosters and Tasks :

Pay Week Ending Day : Sunday ▾

Exclude from dashboard :

Access Timesheet Viewer Report : * this overrides access level

Timesheet Supervisor :

11. Ensure the *Pay Week Ending Day* is correct:

Hide rostered days off :

Exclude from Rosters and Tasks :

Pay Week Ending Day : Wednesday ▾

Exclude from dashboard :

Access Timesheet Viewer Report : * this overrides access level

Timesheet Supervisor :

12. Click *Add*:

Add Team Member

General

Username : Chris

Password : minimum 8 characters (minimum 2 numbers, case sensitive)

First Name : Christopher

Last Name : Robin

Employee Type : Casual (Holiday pay as you go)

Remuneration Type : salary

Pay Frequency : fortnightly

Email Address : chris@gmail.com

Job Title : Relief Milker

Team : no team

Primary Location : Farm 1

Other Locations : select ...

Access Level : Relief Milker

Health and Safety Responsibility Level : worker

Roster display colour :

Hide rostered days off :

Exclude from Rosters and Tasks :

Pay Week Ending Day : Wednesday ▾

Exclude from dashboard :

Access Timesheet Viewer Report : * this overrides access level

Timesheet Supervisor :

Add >>

The following tabs will appear:

Edit Team Member Christopher Robin ▾

General Employment Details Payroll Payroll Audit Notes Reminders User Files Skills Preferences

Username : Chris

Password : minimum 8 characters (minimum 2 numbers, case sensitive)

First Name : Christopher

Last Name : Robin

Employee Type : Casual (Holiday pay as you go)

Remuneration Type : salary

Email Address : chris@gmail.com

Job Title : Relief Milker

Team : no team

Primary Location : Farm 1

Other Locations : select ...

Access Level : Relief Milker

Health and Safety Responsibility Level : worker

Roster display colour :

Hide rostered days off :

Exclude from Rosters and Tasks :

Pay Week Ending Day : Wednesday ▾

Exclude from dashboard :

Access Timesheet Viewer Report : * this overrides access level

Timesheet Supervisor :

save >>

13. Click on the *Employment Details* tab:

14. Enter the *IRD Number*, *Tax Code*, and *Bank Account Number* (if you have the Payroll module):

15. Enter an *Employee Code* (if applicable)

16. Enter in the *Start Date*:

17. Select the applicable KiwiSaver option:

18. If applicable, enter in the KiwiSaver Contributions:

19. If applicable, enter in the *KiwiSaver Opted Out Date*:

Kiwisaver Opted Out Date:

20. Enter in the *Actual Hourly Rate Paid*:

NB: This must include the 8% Holiday pay i.e. an hourly rate of \$17.70 will be entered as \$19.12

Pay Frequency : fortnightly

* Actual Hourly Rate Paid : 19.1200

Minimum Hourly Rate : 0.00

21. Change the *pay period start and end* dates (if applicable) by clicking on the calendar icons:

Latest pay period start : Nov 01 2018

Latest pay period end : Nov 14 2018

22. Click *Save*:

Edit Team Member Christopher Robin

General Employment Details Payroll Payroll Audit Notes Reminders User Files Skills Preferences

IRD Number : 111-222-333

Employee Code :

Tax Code : M

* Start Date : Nov 01 2018

Termination Date :

Employee KiwiSaver Contribution : 4 %

Employer KiwiSaver Contribution : 3 %

Pay Frequency : fortnightly

* Actual Hourly Rate Paid : 17.82

Minimum Hourly Rate : 0.00 (leave this blank to use default rate of 16.50)

Latest pay period start : Nov 01 2018

Latest pay period end : Nov 14 2018

Bank Account Number : 12-3225-6687102-00 [more accounts](#)

save >>

23. If you have the Payroll module, click on the *Payroll* tab:

NB: If you don't have the Payroll module, you have finished setting up your team member

General Employment Details **Payroll** Payroll Audit Notes Reminders User Files Skills Preferences

Payslips: Report

Tax Code: M

IRD Number: 111-222-333

Autocreate Payslips: (will be created 0 days after the end of the pay period)

Regular Payments

Add regular payments this team member will receive each pay where the end date falls between from and to. If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	exclude from KiwiSaver
----------	-------------	--------	------	----	------------------------

Regular Non-Taxable Allowances

Add regular non-taxable allowances team member will receive each pay where the end date falls between from and to. If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to
----------	-------------	--------	------	----

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to. If dates are left empty, deductions will be included indefinitely.

category	description	amount	from	to
----------	-------------	--------	------	----

Other Deductions

Regular Child Support Payments :

Regular Taxable Extra Pay :

Tax on Extra Pay :

Compulsory Student Loan Deductions : 0 % from to

Voluntary Student Loan Deductions : \$ 0 from to

Payroll Opening Balances

This only needs to be done once when migrating from another payroll system during the financial year.

Opening Balance Date : Apr 01 2018

Opening YTD Payments : 0.00

Opening YTD Deductions : 0.00

Opening YTD Non-Taxable Allowances : 0.00

save >>

24. Add in any *Regular Payments, Non-taxable Allowances, and/or Regular Deductions* by clicking on the plus icon:

Regular Payments

Add regular payments this team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	exclude from KiwiSaver	+
----------	-------------	--------	------	----	------------------------	---

Regular Non-Taxable Allowances

Add regular non-taxable allowances team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	+
----------	-------------	--------	------	----	---

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to.
If dates are left empty, deductions will be included indefinitely.

category	description	amount	from	to	+
----------	-------------	--------	------	----	---

25. Enter in *Child Support Payments* or extra *Student Loan Deductions* (if applicable):

Other Deductions

Regular Child Support Payments :

Regular Taxable Extra Pay :

Tax on Extra Pay :

Compulsory Student Loan Deductions : 0 % from to

Voluntary Student Loan Deductions : \$ 0 from to

26. Enter in *Year to Date* figures (if applicable):

Payroll Opening Balances

This only needs to be done once when migrating from another payroll system during the financial year.

Opening Balance Date : Apr 01 2018

Opening YTD Payments : 0.00

Opening YTD Deductions : 0.00

Opening YTD Non-Taxable Allowances : 0.00

27. Click *Save*:

NB: if you need to add prior pay periods, please click [here](#).

General | Employment Details | **Payroll** | Payroll Audit | Notes | Reminders | User Files | Skills | Preferences

Paytype: Baroot
Tax Code: M
IRD Number: 111-222-333
Autocreate Paylips: (will be created 0 days after the end of the pay period)

Regular Payments

Add regular payments this team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	exclude from KiwiSaver	+
----------	-------------	--------	------	----	------------------------	---

Regular Non-Taxable Allowances

Add regular non-taxable allowances team member will receive each pay where the end date falls between from and to.
If dates are left empty, payments will be included indefinitely.

category	description	amount	from	to	+
----------	-------------	--------	------	----	---

Regular Deductions

Add regular deductions this team member will pay each pay where the end date falls between from and to.
If dates are left empty, deductions will be included indefinitely.

category	description	amount	from	to	+
----------	-------------	--------	------	----	---

Other Deductions

Regular Child Support Payments :

Regular Taxable Extra Pay :

Tax on Extra Pay :

Compulsory Student Loan Deductions : 0 % from to

Voluntary Student Loan Deductions : \$ 0 from to

Payroll Opening Balances

This only needs to be done once when migrating from another payroll system during the financial year.

Opening Balance Date : Apr 01 2018

Opening YTD Payments : 0.00

Opening YTD Deductions : 0.00

Opening YTD Non-Taxable Allowances : 0.00

Save >>