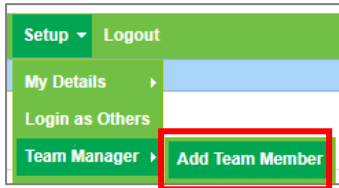
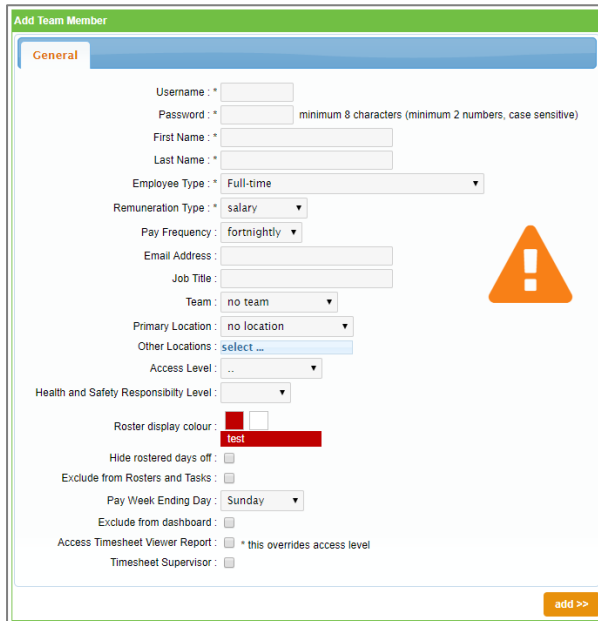


## ADDING A FULL-TIME/PART-TIME/FIXED TERM TEAM MEMBER ON SALARY

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

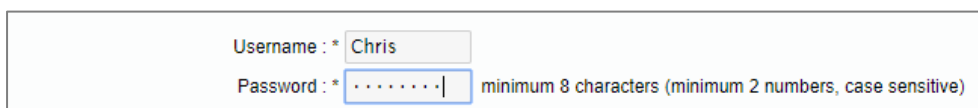


The following screen will appear:

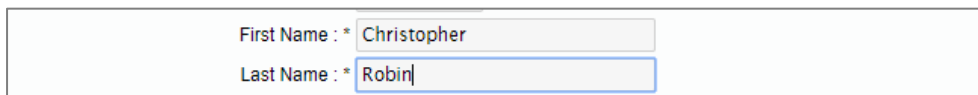


2. Enter in a *Username* and *Password*:

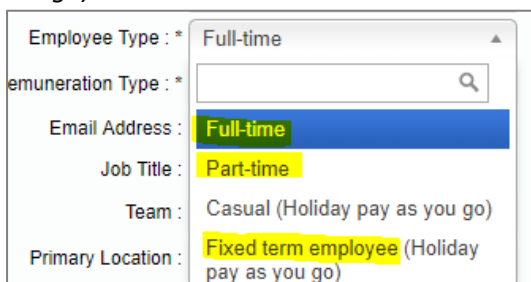
**NB: You cannot have the same username for more than one person, and you cannot have the username in the password. Follow the password instructions next to the Password box**



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



4. Select the applicable *Employee Type* i.e. *Full-Time*, *Part-Time*, or *Fixed Term* (holiday pay as you go):



5. Keep the *Remuneration Type* as *Salary*:

Remuneration Type : \* salary

6. Update the *Pay Frequency* (if applicable):

Pay Frequency : fortnightly

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

Email Address : chris@gmail.com  
Job Title : Farm Manager  
Team : -- all --  
Primary Location : Farm 1  
Other Locations : Select Some Options

8. Select an applicable *Access Level* i.e. *Farm Manager*:

**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 : Farm Manager

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

Health and Safety Responsibility Level : manager

10. 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:

Theme Colors

Standard Colors

More Colors History

#ff99ff #974806

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



This will bring up the following screen:



Select your desired colours.

11. 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 :

12. 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 :

13. 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 : not

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 : test  
 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 >>

14. Click on the *Employment Details* tab:

**Edit Team Member** Bee Lewis

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

IRD Number :  
 Employee Code :  
 Tax Code : -- select tax code --  
 \* Start Date : \*  
 Date Entitled To Sick Leave : \* (casual employees not entitled to sick leave)  
 Termination Date : \*  
 Employee KiwiSaver Contribution : 0 %  
 Employer KiwiSaver Contribution : 0 %  
 KiwiSaver Status : Non-Member  
 KiwiSaver Opted Out Date : \*

Pay Frequency : fortnightly  
 \* Gross Annual Remuneration : 0.00 (total package value)  
 Amount Payable / Pay Period : 0.00  
 \* Number of Weeks Holiday Entitlement : 0 (only leave this field as zero if the employee is a Casual Employee)  
 \* Rostered Days On : 2.5 (click to calculate)  
 \* Rostered Days Off : 1 (click to calculate)  
 \* Daily Contracted Hours : 0.00  
 \* Weekly Contracted Hours : 0 (click to calculate)  
 \* Actual Hourly Rate Paid : (click to calculate)  
 Minimum Hourly Rate : 0.00 (leave this blank to use default rate of 17.70)  
 Sick Day entitlement for the full year : 5  
 Maximum number of sick days available : 20  
 Latest pay change : May 23 2019  
 Latest pay period start : May 20 2019  
 Latest pay period end : Jun 02 2019  
 Bank Account Number : xx-xxxx-xxxxxxxx-xxxx more accounts

save >>

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

The screenshot shows the 'Edit Team Member' form for 'Bee Lewis'. The 'Employment Details' tab is active. Fields for 'IRD Number', 'Employee Code', and 'Tax Code' are highlighted with red boxes. Below these are fields for 'Start Date', 'Date Entitled To Sick Leave', 'Termination Date', 'Employee KiwiSaver Contribution', 'Employer KiwiSaver Contribution', 'KiwiSaver Status', and 'KiwiSaver Opted Out Date'. A large red box highlights the payroll section, which includes 'Pay Frequency', 'Gross Annual Remuneration', 'Amount Payable / Pay Period', 'Number of Weeks Holiday Entitlement', 'Rostered Days On', 'Rostered Days Off', 'Daily Contracted Hours', 'Weekly Contracted Hours', 'Actual Hourly Rate Paid', 'Minimum Hourly Rate', 'Sick Day entitlement for the full year', 'Maximum number of sick days available', 'Latest pay change', 'Latest pay period start', and 'Latest pay period end'. A warning icon is present in the payroll section. The 'Bank Account Number' field is also highlighted with a red box. A 'save >>' button is at the bottom right.

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

Employee Code :

17. Enter in the *Start Date*:

**NB: Once you click *Save*, the *Date Entitled to Sick Leave* will automatically populate**

\* Start Date :  ✕  
 Date Entitled To Sick Leave :  ✕

18. Select the applicable *KiwiSaver* option:

KiwiSaver Status :   
 KiwiSaver Opted Out Date :   
 Pay Frequency :   
 Annual Remuneration :   
 Amount Payable / Pay Period :   
 Number of Weeks Holiday Entitlement :   
 Rostered Days On :   
 Rostered Days Off :

19. If applicable, enter in the *KiwiSaver Contributions*:

Employee KiwiSaver Contribution :  %  
 Employer KiwiSaver Contribution :  %

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

KiwiSaver Opted Out Date :

21. Enter in the *Gross Annual Remuneration* (please ensure you **include** any taxable benefits such as Rent, in this figure i.e. Cash Portion = \$55200 plus Rent of \$5200 = Gross Annual Remuneration of \$60400). If this is for a Fixed-Term employee, ensure you enter their Gross Annual Remuneration with the 8% Holiday Pay on top of it i.e. Gross Annual Remuneration = \$60400 plus 8% Holiday Pay = \$65232

**NB: The Amount Payable/Per Period will automatically calculate once the Gross Annual Remuneration has been entered**

* Gross Annual Remuneration :	60400.00
Amount Payable / Pay Period :	2323.08

22. Enter in the *Number of Weeks Holiday Entitlement*:

**NB: Minimum is 4**

* Number of Weeks Holiday Entitlement :	4
---	---



23. Enter in the Roster as per the Employment Contract:

**For help on this, please click [here](#).**

* Rostered Days On :	3.68	 (click to calculate)
* Rostered Days Off :	1	 (click to calculate)

24. Enter in the *Daily Contracted Hours* as per the Employment Contract:



**NB: The Weekly Contracted Hours and Actual Hourly Rate Paid will automatically calculate once the Daily Contracted Hours have been entered in**

* Daily Contracted Hours :	10.00	
* Weekly Contracted Hours :	55.04	
* Actual Hourly Rate Paid :	21.1036	

25. Only change the following fields if applicable:

Minimum Hourly Rate :	0.00	(leave this blank to use default rate of 17.70)
Sick Day entitlement for the full year :	5	
Maximum number of sick days available :	20	

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

Latest pay period start :	Nov 04 2019	
Latest pay period end :	Nov 17 2019	

27. Click Save:

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

IRD Number: 123-456-789  
 Employee Code:   
 Tax Code: M  
 \* Start Date: Jun 20 2018 ✖  
 Date Entitled To Sick Leave: ✖ (casual employees not entitled to sick leave)  
 Termination Date: ✖  
 Employee KiwiSaver Contribution: 4 %  
 Employer KiwiSaver Contribution: 3 %  
 Kiwisaver Status: Active KS Member  
 Kiwisaver Opted Out Date: ✖

Pay Frequency: fortnightly  
 \* Gross Annual Remuneration: 60400.00 (total package value)  
 Amount Payable / Pay Period: 2323.08  
 \* Number of Weeks Holiday Entitlement: 4 (only leave this field as zero if the employee is a Casual Employee)  
 \* Rostered Days On: 3.68 (click to calculate) ⚠  
 \* Rostered Days Off: 1 (click to calculate)  
 \* Daily Contracted Hours: 10.00 (click to calculate)  
 \* Weekly Contracted Hours: 55.04 (click to calculate)  
 \* Actual Hourly Rate Paid: 21.1036 (click to calculate)  
 Minimum Hourly Rate: 0.00 (leave this blank to use default rate of 17.70)  
 Sick Day entitlement for the full year: 5  
 Maximum number of sick days available: 20

Latest pay change: May 23 2019  
 Latest pay period start: May 20 2019  
 Latest pay period end: Jun 02 2019

Bank Account Number: 12-2343-475532-50 [more accounts](#)

**save >>**

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

**NB: If you don't have the *Payroll* module, skip to the *Leave* tab**

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

Paystips: Report  
 Tax Code: M  
 IRD Number: 111-222-333  
 Autocreate Paystips:  (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 >>**

29. Add in any *Regular Payments*, *Regular 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	+



**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	+
Rent	Rent	\$ 200.00	from	to	<input checked="" type="checkbox"/>	x

**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	+
Wet Weather Gear	Wet Weather Gear	\$ 14.25	from	to	x
Phone Allowance	Phone Allowance	\$ 8.50	from	to	x

**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	+
Rent	Rent	\$ 200.00	from	to	x

30. Add in any *Other Deductions* such as Courts and WINZ. For help on this click [here](#):

**NB: This section is used for deductions that are going into a specific bank account**

**Other Deductions**

Add Payslip deductions  
If dates are left empty, deductions will be included indefinitely.

Category	Description	Total Amount	From	Amount Per Pay Period	Balance	+

31. Enter in *Child Support* payments or *Extra Student Loan* payments (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



32. 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 :

Opening YTD Payments :

Opening YTD Deductions :

Opening YTD Non-Taxable Allowances :

33. Click *Save*:

**NB: If you need to add prior pay periods, please click [here](#) for assistance**

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

Payslips : Record | Latest  
 Tax Code : M  
 IRD Number : 123-456-789  
 Autocreate Payslips :  (will be created 0 days after the end of the pay period)  
 Payslip Option :  Email  Print  Email & Print  No Email / Print

#### 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 Kiwi Saver	
Rent	Rent	\$ 200.00	from	to	<input checked="" type="checkbox"/>	x

#### 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	
Wet Weather Gear	Wet Weather Gear	\$ 14.25	from	to	x
Phone Allowance	Phone Allowance	\$ 8.50	from	to	x

#### 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	
Rent	Rent	\$ 200.00	from	to	x

#### Other Deductions

Add Payslip deductions  
If dates are left empty, deductions will be included indefinitely.

Category	Description	Total Amount	From	Amount Per Pay Period	Balance	
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 :

Opening YTD Payments :

Opening YTD Deductions :

Opening YTD Non-Taxable Allowances :

save >>

34. Click on the *Leave* tab

**NB: If you are setting up a Fixed-Term employee, this tab won't come up so please skip to the *Preferences* tab**

Edit Team Member Rob Smith

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

#### Annual Leave

Annual Leave Report    Unpaid Leave Report    Paid Out Report

Cut-off date of Holiday Pay :

Opening Anniversary Date :

Next Anniversary Date :

Daily Accrual Rate :  (days)

Days Before Cut-off Date :  (number of days between Feb 01 2019 and Feb 01 2019)

Days Accrued Before Cut-off Date :  (number of days accrued between Feb 01 2019 and Feb 01 2019)

Opening Entitlement Days :

Opening Accrual Days :

#### Alternate Days

Alternate Days Report    Paid Out Report

Cut-off date of Alternate Days :

Opening Balance :  (days)

#### Sick Leave

Sick Leave Report

Cut-off date of Sick Leave :

Opening Balance :  (days)

Skip Transfer :  (partner/admin only)

save >>

35. Ensure the *Cut-off date of Holiday Pay* field shows is your new employee's start date (i.e. 20/06/18):

Annual Leave	
Cut-off date of Holiday Pay :	Jun 20 2018
Opening Anniversary Date :	January 1
Next Anniversary Date :	Jan 01 2020
Daily Accrual Rate :	0.0658 (days)
Days Before Cut-off Date :	170 (number of days between Jan 01 2018 and Jun 20 2018)
Days Accrued Before Cut-off Date :	11.186 (number of days accrued between Jan 01 2018 and Jun 20 2018)
Opening Entitlement Days :	0
Opening Accrual Days :	0

36. Change the *Opening Anniversary Date* field from *January 1* to the same day and month of the employee's start date i.e. June 20:

Annual Leave	
Cut-off date of Holiday Pay :	Jun 20 2018
Opening Anniversary Date :	June 20
Next Anniversary Date :	Jan 01 2020
Daily Accrual Rate :	0.0658 (days)
Days Before Cut-off Date :	170 (number of days between Jan 01 2018 and Jun 20 2018)
Days Accrued Before Cut-off Date :	11.186 (number of days accrued between Jan 01 2018 and Jun 20 2018)
Opening Entitlement Days :	0
Opening Accrual Days :	0

37. Change the *Cut-off Date of Alternate Days* to the employee's start date i.e. 20/06/19:

Alternate Days	
Cut-off date of Alternate Days :	Apr 24 2019
Opening Balance :	0

↓

Alternate Days	
Cut-off date of Alternate Days :	Jun 20 2018
Opening Balance :	0

38. Leave the blank *Cut-off Date of Sick Leave* as is:

Sick Leave	
Cut-off date of Sick Leave :	
Opening Balance :	0

### 39. Click Save:

**Annual Leave** Annual Leave Report Unpaid Leave Report Paid Out Report

Cut-off date of Holiday Pay: Jun 20 2018 ⓘ

Opening Anniversary Date: June 20 ⓘ

Next Anniversary Date: Jan 01 2020

Daily Accrual Rate: 0.0658 ⓘ (days)

Days Before Cut-off Date: 170 (number of days between Jan 01 2018 and Jun 20 2018)

Days Accrued Before Cut-off Date: 111.865 (number of days accrued between Jan 01 2018 and Jun 20 2018)

Opening Entitlement Days: 0

Opening Accrual Days: 0 ⓘ

**Alternate Days** Alternate Days Report Paid Out Report

Cut-off date of Alternate Days: Jun 20 2018 ⓘ

Opening Balance: 0 (days)

**Sick Leave** Sick Leave Report

Cut-off date of Sick Leave: ⓘ

Opening Balance: 0 (days)

Skip Transfer:  (partner/admin only)

save >>

### 40. Click on the *Preferences* tab:

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

**Personal Details**

Phone: ⓘ

Mobile Number: Area Code ⓘ Number ⓘ Extension ⓘ

Address: unit type ⓘ unit number ⓘ  
street number ⓘ street name ⓘ  
town / city ⓘ postcode ⓘ

Gender:  male  female

Date of Birth: -- day -- -- month -- -- year --

**Next Of Kin Details**

Next Of Kin: ⓘ

Next Of Kin Address: ⓘ

Next Of Kin Phone: ⓘ

**Look and Feel**

Timesheet Default Activity Code: -- use setup default -- - setup default = GEN

Timesheet Entry Method: exact time

Timesheet Exact Time Style: single box start/stop

Timesheet Pre-populate End Time:

Show Weekly Summary:

Remember Searches:

Small Reports Menu Layout:

Simple Homepage Search:

Team Viewer Access Pin: 0

save >>

### 41. Update the desired information such as *Phone Number*, *Address*, and *Date of Birth*:

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

**Personal Details**

Phone: 0800110172

Mobile Number: Area Code ⓘ Number ⓘ Extension ⓘ

Address: unit type ⓘ unit number ⓘ  
29 ⓘ Liverpool Street ⓘ  
Hamilton ⓘ 3204 ⓘ

Gender:  male  female

Date of Birth: 1 January 1990

**Next Of Kin Details**

Next Of Kin: ⓘ

Next Of Kin Address: ⓘ

Next Of Kin Phone: ⓘ

**Look and Feel**

Timesheet Default Activity Code: -- use setup default -- - setup default = GEN

Timesheet Entry Method: exact time

Timesheet Exact Time Style: single box

Timesheet Pre-populate End Time:

Show Weekly Summary:

Remember Searches:

Small Reports Menu Layout:

Simple Homepage Search:

Team Viewer Access Pin: 0

save >>

## 42. Click Save:

General	Employment Details	Payroll	Leave	Payroll Audit	Notes	Reminders	User Files	Skills	Preferences
<b>Personal Details</b>									
Phone:	0800110172								
Mobile Number:	Area Code	Number		Extension					
	unit type	unit number							
Address:	29		Liverpool Street						
	Hamilton		3204						
Gender:	<input checked="" type="radio"/> male <input type="radio"/> female								
Date of Birth:	1	January	1990						
<b>Next Of Kin Details</b>									
Next Of Kin:									
Next Of Kin Address:									
Next Of Kin Phone:									
<b>Look and Feel</b>									
Timesheet Default Activity Code:	-- use setup default --		- setup default = GEN						
Timesheet Entry Method:	exact time								
Timesheet Exact Time Style:	single box								
Timesheet Pre-populate End Time:	<input type="checkbox"/>								
Show Weekly Summary:	<input checked="" type="checkbox"/>								
Remember Searches:	<input type="checkbox"/>								
Small Reports Menu Layout:	<input type="checkbox"/>								
Simple Homepage Search:	<input type="checkbox"/>								
Team Viewer Access Pin:	0								
									save >>