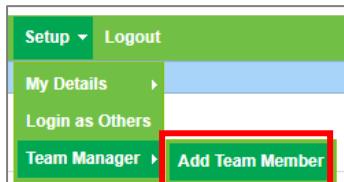
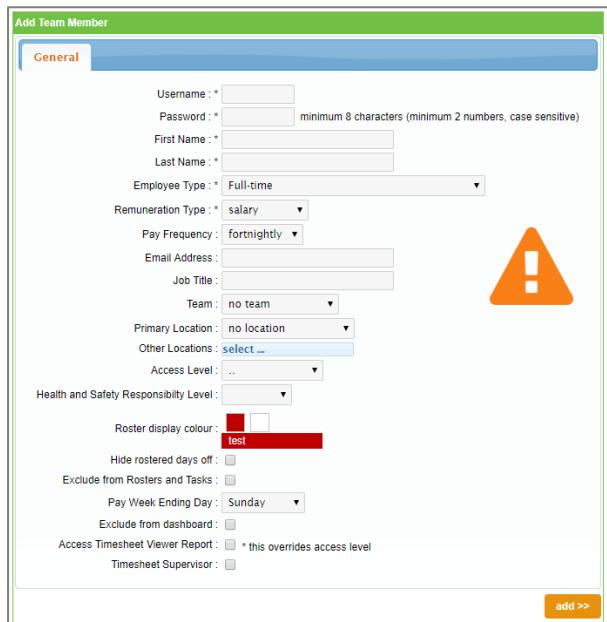


ADDING A FULL-TIME/PART-TIME/FIXED TERM TEAM MEMBER ON WAGES

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



The following screen will appear:



General

Username : *

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

First Name : *

Last Name : *

Employee Type : * Full-time

Remuneration Type : * salary

Pay Frequency : fortnightly

Email Address :

Job Title :

Team : no team

Primary Location : no location

Other Locations : select ...

Access Level :

Health and Safety Responsibility Level :

Roster display colour : red

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 :

add >>

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

Username : * Chris

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

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

First Name : * Christopher

Last Name : * Robin

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

Employee Type : *	<input type="text"/> Full-time
Remuneration Type : *	<input type="text"/>
Email Address :	<input type="text"/> Full-time
Job Title :	<input type="text"/> Part-time
Team :	Casual (Holiday pay as you go)
Primary Location :	Fixed term employee (Holiday pay as you go)

5. Change the *Remuneration Type* to *Wages*:

Remuneration Type : * wages

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

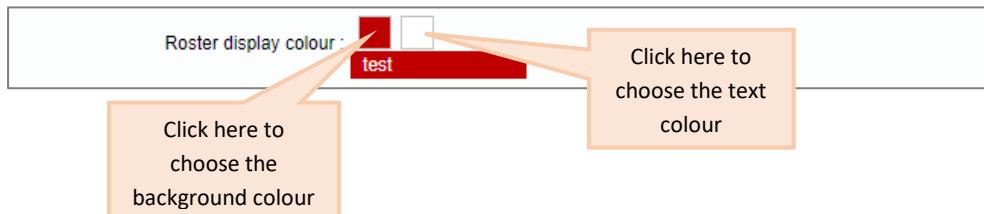
Access Level : Farm Manager

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



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.

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

Hide rostered days off :	<input type="checkbox"/>
Exclude from Rosters and Tasks :	<input type="checkbox"/>
Pay Week Ending Day :	Sunday <input type="button" value="▼"/>
Exclude from dashboard :	<input type="checkbox"/>
Access Timesheet Viewer Report :	<input type="checkbox"/> * this overrides access level
Timesheet Supervisor :	<input type="checkbox"/>

12. Ensure the Pay Week Ending Day is correct:

Hide rostered days off :	<input type="checkbox"/>
Exclude from Rosters and Tasks :	<input type="checkbox"/>
Pay Week Ending Day :	Wednesday <input style="border: 2px solid red;" type="button" value="▼"/>
Exclude from dashboard :	<input type="checkbox"/>
Access Timesheet Viewer Report :	<input type="checkbox"/> * this overrides access level
Timesheet Supervisor :	<input type="checkbox"/>

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 :	<input type="button" value="select..."/>
Access Level :	Relief Milker
Health and Safety Responsibility Level :	worker
Roster display colour :	<input type="color" value="#ff9900"/> red
Hide rostered days off :	<input type="checkbox"/>
Exclude from Rosters and Tasks :	<input type="checkbox"/>
Pay Week Ending Day :	Wednesday <input type="button" value="▼"/>
Exclude from dashboard :	<input type="checkbox"/>
Access Timesheet Viewer Report :	<input type="checkbox"/> * this overrides access level
Timesheet Supervisor :	<input type="checkbox"/>

The following tabs will appear:

Employment Details tab selected.

Form fields include:

- Username: * Chris
- Password: * [redacted] 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:

Employment Details tab selected.

Form fields include:

- IRD Number: [redacted]
- Employee Code: [redacted]
- Tax Code: -- select tax code --
- * Start Date: [redacted]
- Date Entitled To Sick Leave: [redacted] (casual employees not entitled to sick leave)
- Termination Date: [redacted]
- Employee KiwiSaver Contribution: 0 %
- Employer KiwiSaver Contribution: 0 %
- Kiwisaver Status: Non-Member
- Kiwisaver Opted Out Date: [redacted]
- Pay Frequency: fortnightly (total package value)
- * Gross Annual Remuneration: 0.00 (only leave this field as zero if the employee is a Casual Employee)
 - Amount Payable / Pay Period: 0.00
 - * Number of Weeks Holiday Entitlement: 0
 - * Rostered Days On: 2.5
 - * Rostered Days Off: 1
 - * Daily Contracted Hours: 0.00
 - * Weekly Contracted Hours: 0
 - * Actual Hourly Rate Paid: 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: [redacted] + 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' interface with the 'Employment Details' tab active. The 'Bank Account Number' field is highlighted with a red box. A warning message '(leave this blank to use default rate of 17.70)' is displayed below the field.

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

Employee Code : 1039

17. Enter in the *Start Date*:

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

The screenshot shows two date fields: '* Start Date' and 'Date Entitled To Sick Leave', both displaying 'Jun 20 2018'.

18. Select the applicable KiwiSaver option:

The screenshot shows a dropdown menu for 'Kiwisaver Status' with the following options: Active KS Member, Contribution Holiday, Not eligible for KS, Non-Member, and Opted Out. 'Active KS Member' is selected and highlighted in blue.

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

Employee KiwiSaver Contribution : 4 %
Employer KiwiSaver Contribution : 3 %

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

Kiwisaver Opted Out Date:

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

NB: Minimum is 4

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

22. 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)

23. 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

24. Enter in the *Actual Cash Hourly Rate*:

NB: If this is for a Fixed-Term employee, ensure you enter their hourly rate in with the 8% Holiday Pay on top of it i.e. Hourly rate = \$25 plus 8% Holiday Pay = \$27 per hour

Actual Cash Hourly Rate :	25
---------------------------	----

25. Ignore the *Annual Non-Cash Benefit* section:

Annual Non-Cash Benefit :	0.00	- Converted to Hourly Rate :	0.00
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26. Enter in the *Per Period Non-Cash Benefit* (if applicable):

NB: Use this when Rent is on top of the team member's hourly rate. For example, the team member gets \$200 Rent each fortnight, which is on top of their hourly rate of \$25

Per Period Non-Cash Benefit :	200
-------------------------------	-----

27. The *Actual Hourly Rate Paid*, *Gross Annual Remuneration*, and *Amount Payable/Pay Period* should have automatically pulled through. If it hasn't, click on the calculator icons to pull the information down (shown below):

* Actual Hourly Rate Paid :	25.00	(click to calculate)
Minimum Hourly Rate :	0.00	(leave this blank to use default rate of 17.70)
* Gross Annual Remuneration :	76756.00	(click to calculate)
Amount Payable / Pay Period :	2952.15	

28. 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	

29. 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	

30. 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
 * Rostered Days Off : 1
 * Daily Contracted Hours : 10.00
 * Weekly Contracted Hours : 55.04
 * Actual Hourly Rate Paid : \$21.1036
 Minimum Hourly Rate : \$0.00
 Sick Day entitlement for the full year : 5
 Maximum number of sick days available : 20 (leave this blank to use default rate of 17.70)

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

Bank Account Number : 12-343-4755532-50



31. 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

Payslip : 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 :	<input type="text"/>
Regular Taxable Extra Pay :	<input type="text"/>
Tax on Extra Pay :	<input type="text"/>
Compulsory Student Loan Deductions :	0 % from <input type="text"/> to <input type="text"/>
Voluntary Student Loan Deductions :	\$ 0 from <input type="text"/> to <input type="text"/>

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

32. 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"/>
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	
Phone Allowance		Phone Allowance	\$ 8.50	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	
Rent		Rent	\$ 200.00	from	to	

33. 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

34. Enter in *Child Support* payments or *Extra Student Loan* payments (if applicable):

Other Deductions						
Regular Child Support Payments : <input type="text"/>						
Regular Taxable Extra Pay : <input type="text"/>						
Tax on Extra Pay : <input type="text"/>						
Compulsory Student Loan Deductions : 0 % from <input type="text"/> to <input type="text"/>						
Voluntary Student Loan Deductions : \$ 0 from <input type="text"/> to <input type="text"/>						

35. 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	<input type="button" value="Calendar"/>
Opening YTD Payments :	0.00	
Opening YTD Deductions :	0.00	
Opening YTD Non-Taxable Allowances :	0.00	

36. 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

Payslip Report | Latest Tax Code: N IRD Number: 123-456-789 Autoreate Payslips: (will be created 0 days after the end of the pay period) Paylip 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 KiwiSaver <input type="checkbox"/>
Rent	Rent	\$ 200.00	from	to	<input checked="" type="checkbox"/>

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
Phone Allowance	Phone Allowance	\$ 8.50	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
Rent	Rent	\$ 200.00	from	to

Other Deductions
Add Paylip 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 :	Apr 01 2018	<input type="button" value="Calendar"/>
Opening YTD Payments :	0.00	
Opening YTD Deductions :	0.00	
Opening YTD Non-Taxable Allowances :	0.00	

save >>

37. 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

Cut-off date of Holiday Pay : Feb 01 2019
 Opening Anniversary Date : January
 Next Anniversary Date : Jan 01 2020
 Daily Accrual Rate : 0.0503
 Days Before Cut-off Date : 0 (number of days between Feb 01 2019 and Feb 01 2019)
 Days Accrued Before Cut-off Date : 0 (number of days accrued between Feb 01 2019 and Feb 01 2019)
 Opening Entitlement Days : 0
 Opening Accrual Days : 0

Alternate Days

Cut-off date of Alternate Days : Feb 01 2019
 Opening Balance : 0

Sick Leave

Cut-off date of Sick Leave :
 Opening Balance : 0
 Skip Transfer : (partner/admin only)

save >>

38. 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	

39. 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	

40. 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

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

Sick Leave

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

42. Click Save:

43. Click on the *Preferences* tab:

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

45. Click Save:

The screenshot shows the 'Preferences' page with the 'Personal Details' tab selected. The page contains several sections: 'Personal Details' (with fields for Phone, Mobile Number, Address, Gender, and Date of Birth), 'Next Of Kin Details' (with fields for Next Of Kin, Next Of Kin Address, and Next Of Kin Phone), and 'Look and Feel' (with settings for Timesheet Default Activity Code, Timesheet Entry Method, Timesheet Exact Time Style, and various checkboxes for weekly summaries, remember searches, etc.). At the bottom right, there is a prominent orange 'save >>' button.