

## Bulk team manager

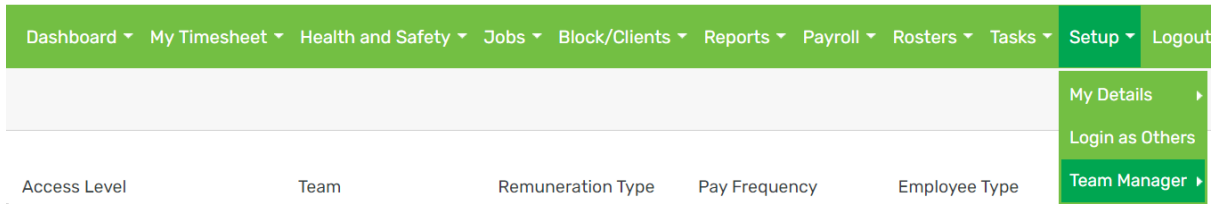
*Use this feature to edit employee details in bulk*

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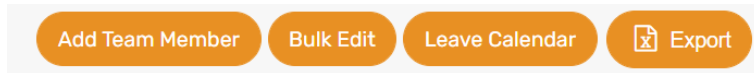
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## How-to

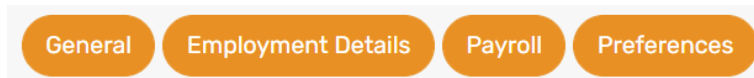
1. Hover on **Setup**, click on **Team Manager**:



2. Click **Bulk Edit**:



3. Click the appropriate tab:



4. Refine your search using the filters (if applicable):

Search  Location  Team  Employee Type  Remuneration Type  Status

5. Select or type the amendment(s) in the yellow box:

Job Title	Team
<input type="text" value="search"/>	<input type="text" value="-- all --"/>
<input type="text"/>	<input type="text" value="Select an Option"/>
▼	▼

6. Click the arrow(s)

Job Title	Team
<input type="text" value="search"/>	<input type="text" value="-- all --"/>
<input type="text" value="Worker"/>	<input type="text" value="A"/>
▼	▼

7. Select the checkbox for each employee that is to be amended in the **Update Team Member** column:

*Note: Click the checkbox in the yellow row to select all employees*

Update Team Member	Team Member	Employee Type	Job Title	Team
<input type="checkbox"/>	search	-- all --	search	-- all --
<input type="checkbox"/>		Select an Option	Worker	A
<input checked="" type="checkbox"/>	Andy Dwyer	Full-time	Worker	A
<input checked="" type="checkbox"/>	April Ludgate	Full-time	Worker	A

8. Scroll to the bottom and click **Save**

9. There will be a tick in the **Updated** column to indicate the amendment(s) saved successfully:

Update Team Member	Team Member	Employee Type	Job Title	Team	Primary Location	Other Locations	Access Level	Updated
<input type="checkbox"/>	search	-- all --	search	-- all --	-- all --	-- all --	-- all --	
<input type="checkbox"/>		Select an Option	Worker	A	Select an Option	Select Some Options	Select an Option	
<input type="checkbox"/>	Andy Dwyer	Full-time	Worker	A	Main Farm	Select Some Options	My Timesheets	<input checked="" type="checkbox"/>
<input type="checkbox"/>	April Ludgate	Full-time	Worker	A	no location	Select Some Options	Manager	<input checked="" type="checkbox"/>

*Note: Steps 5-7 can be done in any order*

## What can be edited

### General

In this tab you can bulk edit:

- Employee type
- Job title
- Team
- Primary location
- Other locations
- Access level

### Employment details

In this tab you can bulk edit:

- Tax code
- Start date
- Termination date
- Employee Kiwisaver contribution
- Employer Kiwisaver contribution
- Pay frequency
- SHO, SL & BR basis
- Rostered days on (excluding casual HPAYG employees)
- Rostered days off (excluding casual HPAYG employees)
- Automatic work pattern frequency (if applicable)
- Daily contracted hours (excluding casual HPAYG employees)
- Actual hourly rate paid (excluding salaried employees)

### Payroll

This section is split into the following subsections:

- General
- Regular payments
- Regular allowances
- Regular deductions
- Other deductions
- Daily incentive bonuses
- Opening balance



#### General (payroll)

In this tab you can bulk edit:

- Payslip option (email, print, both or none)

### Regular payments

In this tab you can bulk edit:

- Category
- Description
- Amount
- From
- To
- Exclude from KiwiSaver

You can also bulk delete regular payments here

### Regular allowances (non-taxable)

In this tab you can bulk edit:

- Category
- Description
- Amount
- From
- To

You can also bulk delete regular allowances here

### Regular deductions

In this tab you can bulk edit:

- Category
- Description
- Amount
- From
- To

You can also bulk delete regular deductions here

### Other deductions

In this tab you can bulk edit:

- Total amount
- Deduction type
- Amount per pay period
- Percent per pay period
- Category
- Description
- Bank account number
- Bank account name
- Reference
- Code
- Particulars
- Start date

You can also bulk delete other deductions here

### Daily incentive bonuses

In this tab you can bulk edit:

- Activity code for automated bonuses
- Activities applied to
- Activities excluded

You can also bulk delete daily incentive bonuses here

### Opening balances (year to date balances)

In this tab you can bulk edit:

- Opening balance date
- Opening YTD payments
- Opening YTD deductions
- Opening YTD non-taxable allowances

### Preferences

In this tab you can bulk edit:

- Timesheet client access
- Timesheet default activity code
- Timesheet default job