Service Autopilot™

PAYROLL REPORT & TIMESHEETS

User Guide

Version 1.1

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Working with Payroll Report

Service Autopilot's Payroll Report feature calculates overtime and regular pay for employees and contractors whose hours you track.

This feature is not a full payroll system: it doesn't calculate tax or create paychecks, but you can download the information from Payroll Report to a spreadsheet that you send to a third-party payroll company.

This section shows you how to set up, use, and export your Payroll Report.

Set Up Permissions for Payroll Report

Before you start using the Payroll Report, you need to set permissions for yourself and your employees or contractors.

1. Click the **Settings** icon .
2. Go to **Company > User Roles and Rights**.
3. Click a role in the list, then click the "Accounting" tab. If needed, you can create a new role by going to **Actions > Add Role**.
4. Clear any check boxes in the **Accounting Reports** list to prevent this role from seeing certain reports.
5. In the **Payroll Access** list, check or uncheck the check boxes for these:

   Show Pay Rate -- allows this role to see hourly rates for employees or contractors

   Show Wage Burden – allows this role to see a "Total Pay" column on the Timesheets screen

   Can Approve Timesheets – allows this role to approve employee or contractor timesheets

   Can Unapprove Timesheets--allows this role to remove the "Approved" status from employee or contractor timesheets

   View Payroll Report -- allows this role to use the Payroll Report feature

   View Wall Clock -- allows this role to access and set up the Wall Clock feature in SA (for more information, see "Using the Wall Clock" on page 15.

   Employee - View Payroll – allows this role to see the "Payroll / Job Costing" tab when editing employees

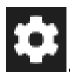
Vendor - View Payroll – allows this role to see the "Payroll / Job Costing" tab when editing contractors (you might uncheck for an external accountant or other non-direct contractor)

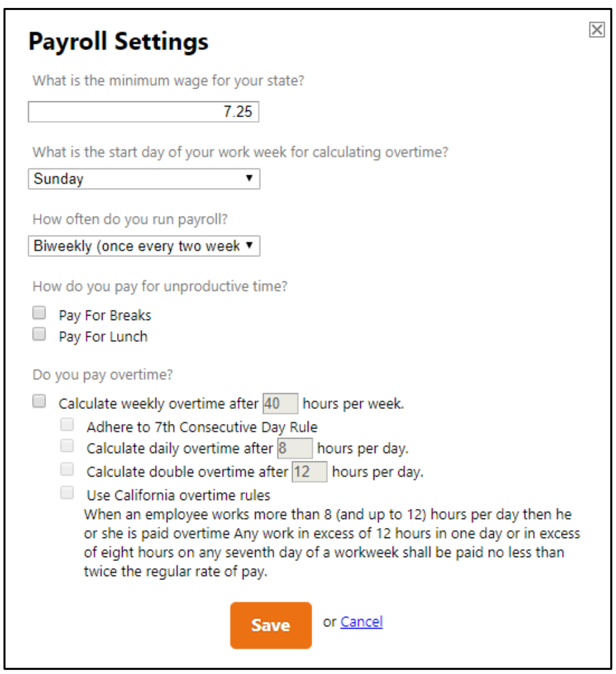
6. Set up permission for exporting reports by going to the "Home" tab. In the **"**Other Access" column, check the **Export Lists** check box to allow exporting reports such as the Payroll report, Commission report, and Timesheet report.

Set Up Payroll Report for Your Company

Service Autopilot's Payroll Report feature lets you set up various parameters to calculate your employees or contractors' Payroll Report. This tool will help you comply with the [Fair Labor Standard Act](#) (FLSA).

The first step is to set up general payroll settings for your company.

1. Click the **Settings** icon .
2. Scroll to **Accounting > Payroll Settings**.



3. Fill in your minimum state wage (for example, 7.75, 9.00, etc.)
4. Choose the first day of your work week. This will be used to calculate overtime.
5. Select an option from "How often do you run Payroll Report?" to show which days you run payroll.

   Weekly (once a week)

   Biweekly (once every two weeks)

Monthly (once a month)

Bimonthly (twice a month).

Note: if you select **Monthly** or **Bimonthly**, a field appears where you must put in the day(s) of the month when you run the Payroll Report.

6. Under “How do you pay for unproductive time?” check or uncheck “Pay For Breaks” or “Pay for Lunch.”
7. Under “Do you pay overtime?” set up the rules for your company, if applicable.

   Weekly Overtime – Specify the number of hours that must be worked per week in order for weekly overtime to start accruing.

   7th Consecutive Day Rule – See “About California overtime rules” below.

   Daily Overtime – Specify the number of hours that must be worked before daily overtime starts accruing.

   Double Overtime – Specify the number of hours that must be worked before double overtime starts accruing.

   California Overtime – Select this to accept the default daily hours for overtime and double-time that are set by California law.

About California overtime rules

When an employee or contractor works more than 8 (and up to 12) hours per day and/or works the first 8 hours on the seventh consecutive day of a work week, then he or she is paid **overtime**. In addition, any time an employee or contractor works more than 12 hours in one day and/or works more than 8 hours on the seventh consecutive day of a work week, then he or she is paid **double-time**.

Set Up Payroll Report for Your Employees or Contractors

For each hourly employee or contractor, fill in their information by following these steps.

1. Go to **Team > Employees** or **Team > Vendors**, then click an employee or contractor in the left panel.
2. On the **Edit Employee** screen, click the "Payroll Report / Job Costing" tab.
3. Select a Compensation Type of "Hourly" from the dropdown list, then enter the hourly amount in the next field.

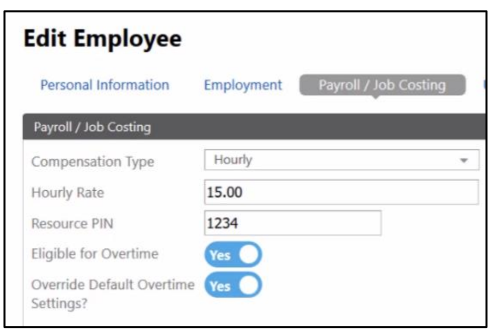
   Note: Currently, the system does not track overtime hours for salaried employees.
4. Enter a unique, four-digit PIN for the employee or contractor in the "Resource PIN" field. This is required for each employee or contractor who uses the Wall Clock. See "Using the Wall Clock" on page 15 for more information.
5. Specify your overtime settings.

   Note: If an employee or contractor is eligible for overtime, you must enable the overtime setting to comply with the Fair Labor Standard Act (FLSA).

   If you don't pay for overtime, click **Save** and return to step 1 for each employee or contractor.

   If you do pay for overtime, select "Eligible for Overtime" and do one of the following:

   - Leave the "Override Default Overtime Settings? at "No" and click **Save**. This will cause your overtime wages to be calculated based on your company settings.
     OR
   - Select "Override Default Overtime Settings" to set up the specific overtime rules in the additional fields that appear.

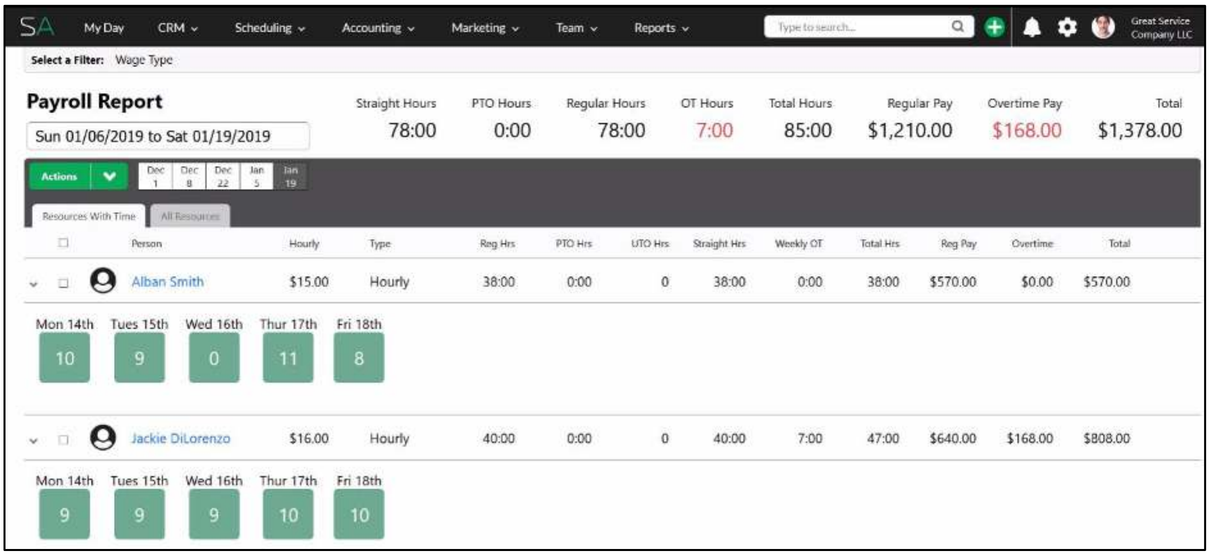
   

6. Click **Save** and repeat these steps for each employee or contractor you track in Payroll Report.

Note: The **Costing Information** section is used only for Job Costing reports.

Payroll Report Screen

The **Payroll Report** screen shows the most recent pay period you have set up based on your company's payroll settings. The columns in the sample below might vary from what you see on your Payroll Report, because they depend on your company's pay policies.



- The "Resources with Time" tab shows time logged for any employees or contractors during the specified date range. The green squares show the number of hours for each day that the employee or contractor logged time.
- The "All Resources" tab shows all your employees or contractors, regardless of whether they logged time during the specified date range.

Payroll Report Columns

The columns included on your Payroll Report depend on your company's pay policies.

Person– A paid resource, either an employee or contractor

Hourly – Wage per hour

Type– Wage type, usually Hourly

Reg Hrs – Regular, non-overtime hours

PTO Hrs – Paid Time Off hours

UTO Hrs – Unpaid Time Off hours

OT Hrs – Overtime hours display in red

Straight Hrs – Regular hours plus overtime hours

Daily OT or **Weekly OT** – For businesses that pay daily or weekly overtime, this shows the overtime hours for the time period

Total Hrs – Regular hours plus overtime hours

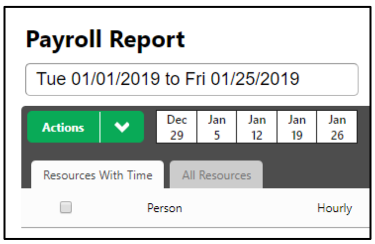
Reg Pay – Pay for regular hours

Overtime - Overtime pay displays in red

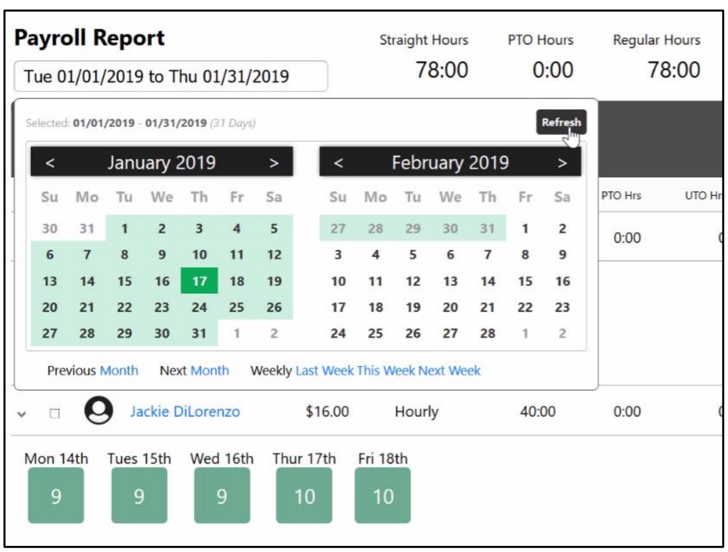
Total - Regular Pay plus Overtime Pay

Select a Date Range

To see a standard date range, click one of the time periods shown at the top of the Payroll Report screen. The date range is based on the standard pay periods for your company.



To select a different date or range of dates, click in the date field at the top, and a calendar appears. You can click a single date or a range by clicking start and end dates, then click **Refresh**.



The records for your selected date range appear.

View Employee or Contractor Hours

Click the row for an employee or contractor to see more information.

The system shows you when there is an error of some kind with a warning symbol. 

You can hover over the symbol to see a tooltip about the issue. See “Troubleshoot Timesheets” on page 14 for information on the types of warnings that you might see.

Change Employee or Contractor Hours

If needed, you can make changes before you approve the timesheet records. For example, you might need to adjust a record if an employee forgot to log out one day. On the “Clocked Time” tab, edit their time by doing one of the following:

- Click a green square to open the employee’s timesheet record for that day.

  OR

- Click the employee’s name to open their timesheet record for the selected date range.

View Job Costing Information

The “Work Time” tab shows records for clocking in/out, and drive time. This information is for job costing, not payroll.

Approve or Unapprove Timesheet Entries

Follow these steps to approve or unapprove entries. This will generate Payroll Report records.

1. Go to **Accounting > Payroll Report** and select a date range, if needed.
2. Select an employee or contractor by clicking their check box; or to select all, click the check box in the table header.
3. Under **Actions**, click either **Mark as Approve** or **Unapprove**.
4. In the dialog box, click **OK** to confirm the Payroll Report for the employee or contractor.

A check mark icon appears on the records to show they have been approved. This means that you can no longer change that timesheet record unless you unapprove it.

Export Your Payroll Report

You can export the Payroll Report to send to a third-party payroll company like ADP or Paychex. Follow these steps.

1. On the **Payroll Report** screen, click one or more resources, then click **Actions**.
2. Select **Export Payroll Report** in the dropdown list.
3. Allow a few minutes for the export to complete.
   You may continue working in Service Autopilot while the export processes.

Note: If the download does not start after a few minutes, verify that your browser allows popups from Service Autopilot.

Working with Timesheets

Service Autopilot generates timesheet records after an employee or contractor logs time on the Mobile App or Wall Clock, or a supervisor inputs the time on the Dispatch Board.

You can access the Timesheets screen and make changes to individual records, depending on your user roles and rights.

Set Up Permissions for Timesheets

To allow an employee or contractor to access and edit Timesheet entries, follow these steps:

1. Go to **Settings > Company > User Roles and Rights**.
2. Click a role name and go to the "Accounting" tab.
3. Under **Accounting Access**, check the **View Timesheets** check box to enable Timesheets.
4. Click **Save**.

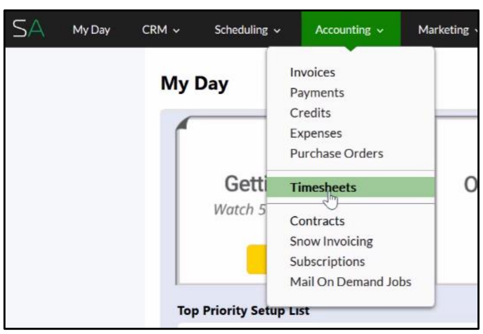
Access Timesheets

The **Timesheets** screen has two tabs:

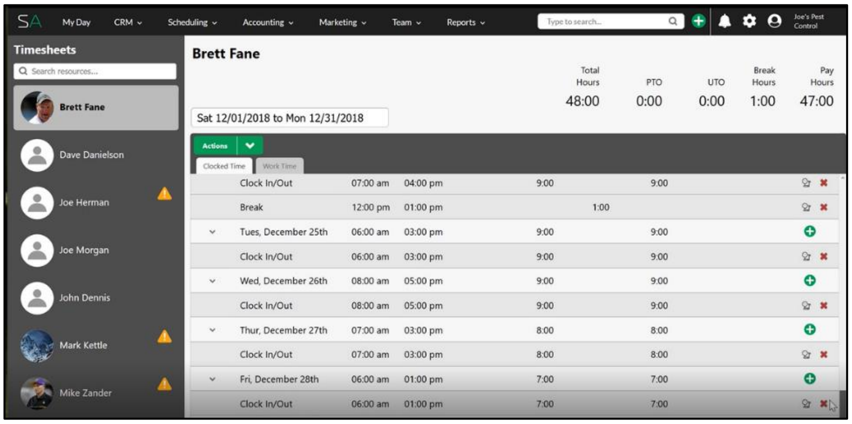
"Clocked Time" contains records related to payroll.

"Work Time" contains records related to jobs.

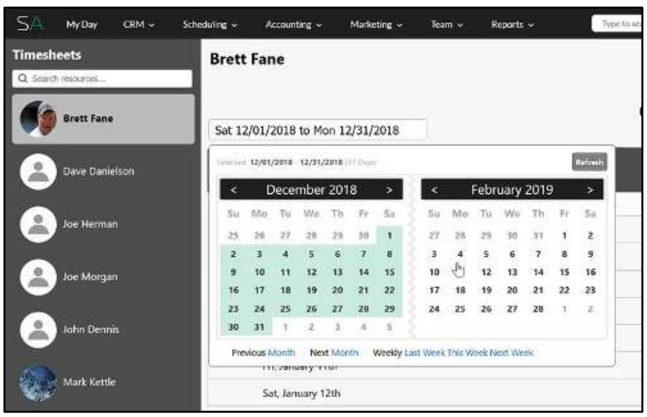
1. Go to **Accounting > Timesheets**.



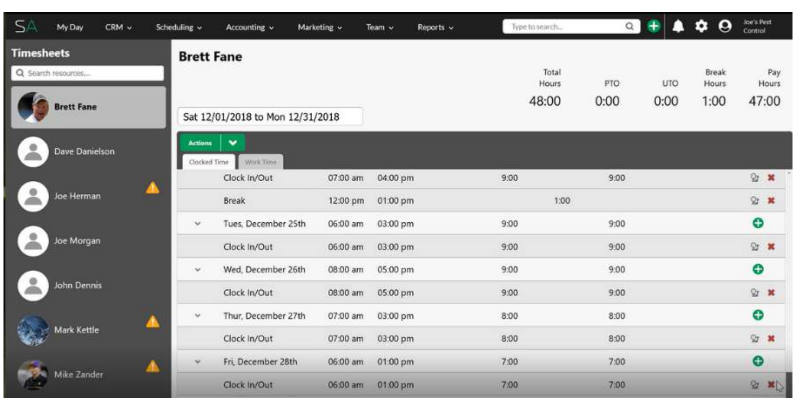
2. Click a resource name in the left panel. The resource's current timesheet records appear.



3. Click a time period below the calendar, such as Last Month, or select a date range in the calendar.



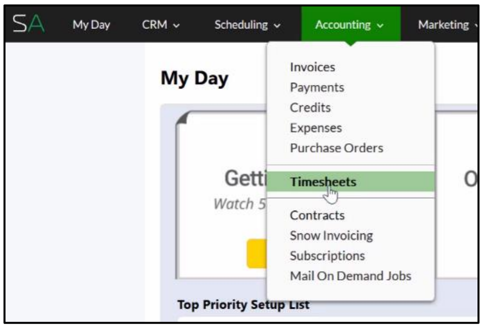
4. Select the **Clocked Time** or **Work Time** tab to see the daily timesheet records for this resource.



Change a Timesheet

You might need to change a timesheet entry for various reasons, such as when an employee or contractor forgets to clock out. Follow these steps to change information on either the “Clocked Time” or “Work Time: tab:

1. Go to **Accounting > Timesheets**.



2. Select a resource from the left panel to see their timesheet records.
3. Click a day to see the time-entry detail.
   If the day you’re looking for is not shown, click the date range at the top of the screen and select a new date range from the calendar.

4. To add a timesheet entry, click the “add” button. 

5. Fill in the **Timesheet Entry** overlay:

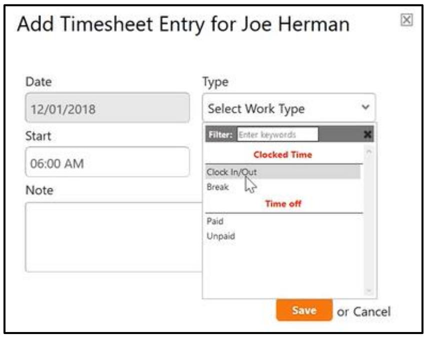
   Date – Date for the timesheet entry.

   Type – (Clock In/Out, Break, Paid Time Off, Unpaid Time Off)

   Start – Start time for the timesheet entry.

   Stop – Stop time for the timesheet entry.

   Note – Note related to the timesheet entry.

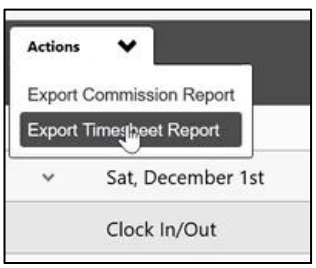


6. Click **Save**.

Export Timesheets

You have the option to generate an export of timesheets to send to a third-party vendor. Follow these steps.

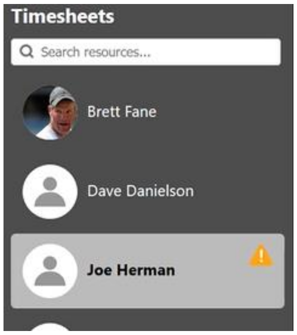
1. On the **Timesheets** screen, click an employee or contractor name in the panel on the left.
2. Select **Actions > Export Timesheet Report** from the dropdown list.



3. On the **Export** overlay, change the date range if needed, then click **Export**.
   Allow a few minutes for the export to complete. You may continue working in Service Autopilot while the export processes.
4. Check the My Day page for your export report. You have up to five days to retrieve the report from My Day.

Troubleshoot Timesheets

The **Timesheet** screen will alert you if the system finds an entry error. If there is a difference, you will see an orange warning icon ⚠ icon on a resource's timesheet entry.



A warning icon can appear if any of these occurs:

- The timesheet entry is less than a minute.
- The timesheet entry is greater than or equal to 12 hours.
- There is no clock-out time for the prior date.

Click a timesheet event and edit the information as needed.

Using the Wall Clock

The Wall Clock offers your employees a way to clock in and out at work without a Service Autopilot login.

Under the user avatar, click **Wall Clock Mode**.

You can use any device, such as a spare laptop or tablet, and set it up in your office as your company Wall Clock (you don't even need to put it on the wall!). During setup, you'll issue a PIN number to each employee or contractor for clocking in and out.

Follow these steps to set up the Wall Clock for your employees and vendors.

Assign Permission to Use the Wall Clock

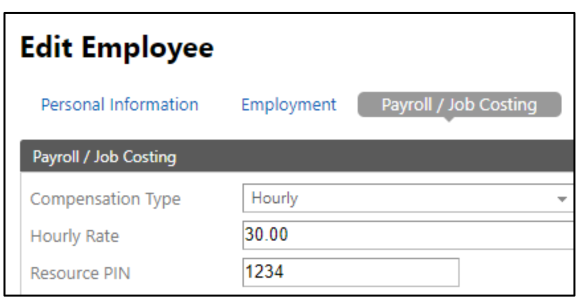
The first step is to assign permission for the user whose account will be used for the Wall Clock. That user can also continue to use SA on another device. Employees and contractors don't need SA permissions to clock in and out, just a PIN.

1. Go to **Settings > Company > User Roles & Rights**.
2. Click a role in the list, then click the "Accounting" tab.
3. In the "Payroll Access" list, check **View Wall Clock**.
4. After starting the wall clock, you are free to log in as that user on another device.

Set Up PINS for Wall Clock Users

If you haven't done so already, assign unique PINs to any resource who will use the Wall Clock.

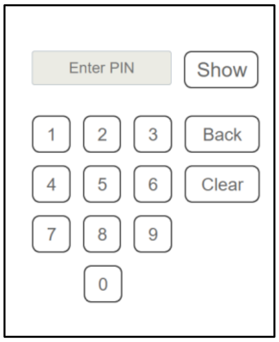
- For each resource, go to **Team > Employees** or **Team > Vendors**.
- Click a resource, then click the **Edit** link.
- Go to the "Payroll / Job Costing" tab and type in a four-digit PIN. Each resource must have a different PIN.



- Click **Save**, then repeat for each resource.

Run the Wall Clock

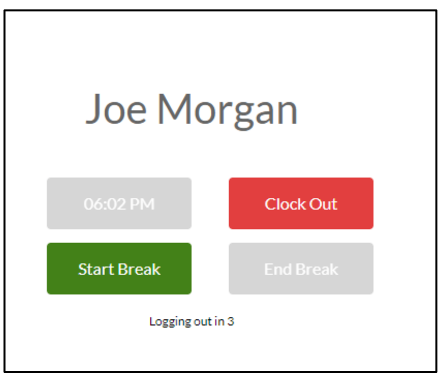
1. Under the user avatar, click **Wall Clock Mode**.



2. Click the number pad to enter your PIN. The **Show** button lets you see the PIN as it's entered.
3. The **Clock In** screen appears. Click **Clock In**. The main Wall Clock screen returns, and another resource can now log in.

The system creates a clock-in record for the day, as well as an audit record. This will appear on the resource's timesheet.

The next time that resource enters their PIN, they have the option to **Clock Out** or **Start Break**.



If the employee or contractor does not select an option within 30 seconds, the screen returns to the Wall Clock, where they can enter their PIN again if needed.

Upon clocking in, the **Clock Out** and **Start Break** buttons are enabled.

At the end of the workday, the resource repeats the process of entering their PIN and clicks **Clock Out**.

If any employee or contractor fails to clock in or out, you can edit their time records on the Timesheet. See "Change a Timesheet" on page 12.