

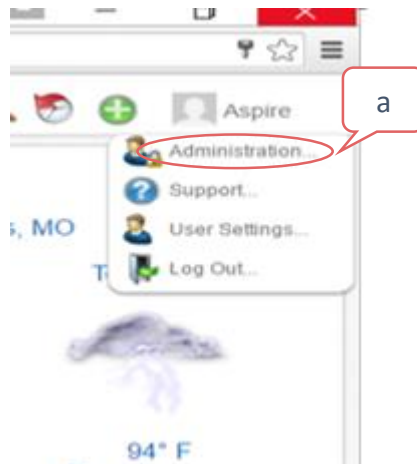
Payroll Set Up in Aspire

How to Set Up Payroll in Aspire

To set up payroll in Aspire, you will need to set up the Time Reporting options, set up necessary codes, and fill in the employee's HR tab.

To set up Time Reporting Options:

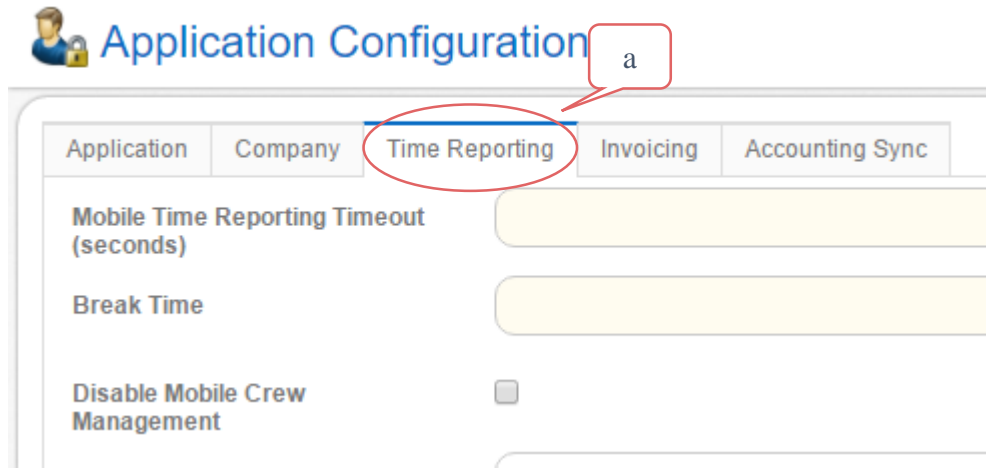
- 1 After logging in, go to the Administration page^a.



- 2 Click the Pencil^b icon in the upper right hand corner.



In the Application Configuration, click the Time Reporting tab^a.



Fill in all information:

Mobile Time Reporting Timeout – If field employees will be using a Mobile device for time reporting, this is to set the seconds before the mobile will timeout.

EX: 3 Minutes would be 180 seconds.

Break Time – If crews are required to take a lunch during the work day fill in the *Break Time* field with the required time. This will show on the *Time Entry* screen.

EX: Half Hour = .50 (AND) Hour = 1.00

Disable Mobile Crew Management – If checked, Aspire requires crew members to clock themselves in and out individually as well as clock in and out for lunch if required, rather than allowing the Crew Leader to perform these functions on their behalf. This is only for clocking in at the beginning of the day, and clocking out at the end of the day.

First Day of Week – Choose the first day of your payroll workweek.

Past Days to Allow Edit of Time Entry – This is the number of days from the day time is accepted that time will allowed to be edited in the past.

EX: 14 to 21 days – 2 to 3 weeks.

Default GEO Perimeter – The geo perimeter allows Aspire to determine if the crews have clocked in or out within a certain distance of each property. The feet that you put here is measured from the center of the property, so base the number on your standard property size.

In certain cases, for large or small properties, a special geo perimeter can be set on the property itself that will override the default set here.

When using mobile time entry Production managers will be able to identify where the crew was in reference to the geo perimeter based upon the following icons



Green means the employee was within the GEO Perimeter.



Yellow means system could not read the location of the employee's mobile. Or time was changed or entered manually into the *Time Entry* screen



Red means the employee was outside the GEO Perimeter. Aspire will tell you where the employee is when they clocked in.


The red and green push pins are hyperlinks to google maps and will spot the exact location at the time the crew punched in or out.

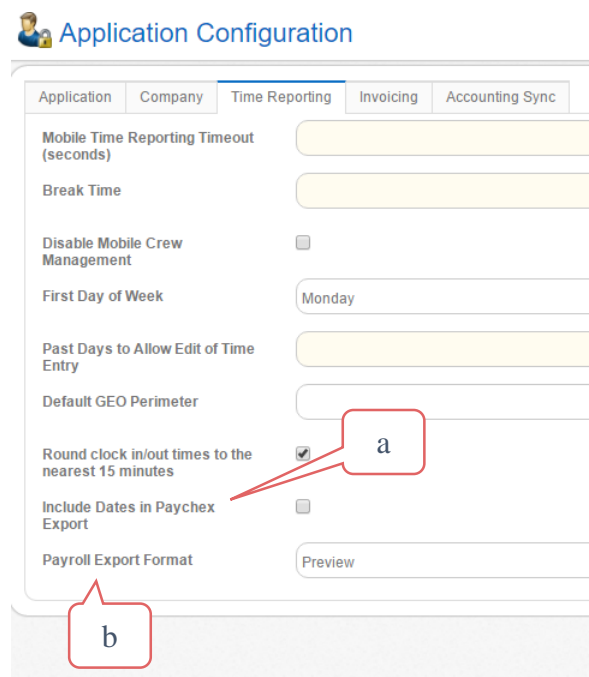
Round Clock in/out times to the nearest 15 minutes – Check this box if you want an employee's clock in/out time to round up or down to the nearest 15 minutes. If the employee's clock is between 8:00 and 8:07 the clock rounds back to 8:00 exactly, anything after 8:07 means it will round up to 8:15.

Include Date in Paychex Export^a – If you are using a payroll service check this box if you need the hours to export for each day of the week for each employee. (This box is normally not checked).

- *Do not check if exporting payroll to QuickBooks.* That export will automatically export for each day.

Payroll Export Format^b – There are four options to choose from in the dropdown menu. Choose the option that best applies to you. (If you are unsure, or have questions, please contact your Account Manager).

After all changes have been made, click the Save Icon at the bottom right. 



Application Configuration

Application Company **Time Reporting** Invoicing Accounting Sync

Mobile Time Reporting Timeout (seconds)

Break Time

Disable Mobile Crew Management ☐

First Day of Week

Past Days to Allow Edit of Time Entry

Default GEO Perimeter

Round clock in/out times to the nearest 15 minutes ☒ **a**

Include Dates in Paychex Export ☐

Payroll Export Format **b**

Information that you will need to setup in Aspire:

Setting up payroll requires setting up of codes in Aspire. When setting up codes, remember The following information must match the codes used by your payroll service or in QuickBooks desktop.

Codes and procedures that will be addressed:

- Branch Code
- Division Code
- Localities Codes (If Required by your State)
- Pay Codes
- Pay Schedules
- Setting up an Employee with Payroll
- How to override Pay Rates

TO ADD CODES IN ASPIRE:

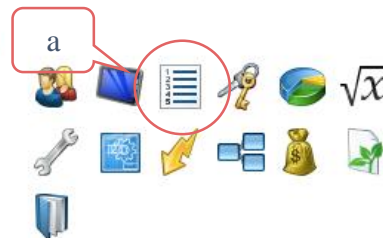
1. Go back into the *Administration* screen and click on the *Manage Lists* icon^a. All of the lists that you are about to create are accessed in the *Manage Lists* screen of Aspire.

System Overview

Application

Estimating

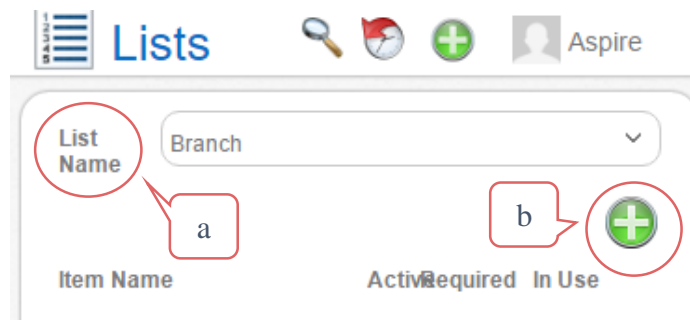
Purchasing



Branch Code:

This list allows you to find or create your branches.

- **List Name^a** – Choose **Branch** from the drop down list.
- To add a **Branch** – Select the *Green Plus^b* sign at the top right of the screen.
- Fill out all of the needed information for the new Branch. When adding the Branch Code^a remember the following:
 - The Branch Code is being used to export/import into your accounting system or payroll service.



- Branch Codes have a 6-character (Alpha or Numeric) limit for QuickBooks and Paychex. If you are using a different payroll service, they will need to be contacted for their limits.
- *In QuickBooks* if you are using classes for reporting Branch and/or Division revenue, and you do not want to change these to 6 characters. You can create additional branches just for payroll exporting purposes only.

Branch | ****New****

Branch Name	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Legal Name	<input type="text"/>	Catalog List	Select One... <input type="button" value="v"/>
Branch Manager	Select One... <input type="button" value="v"/>	Internal Property	Select One... <input type="button" value="v"/>
Address 1	<input type="text"/>	Branch Code	<input type="text"/>
Address 2	<input type="text"/>	Timezone	<input type="button" value="v"/>
City	<input type="text"/>	Do Not Cost Tax on Purchases	<input type="checkbox"/>
State/Zip	Select One... <input type="button" value="v"/> <input type="text"/>	Invoice Number Prefix	<input type="text"/>
Purchase Receipt Number Prefix	<input type="text"/>	Opportunity Number Prefix	<input type="text"/>
Work Ticket Number Prefix	<input type="text"/>		

- Branch Codes in Aspire equate to Classes in QuickBooks (only add branch codes in Aspire if you have more than one Branch). If you are using a Payroll Service, a Branch might equate to a department and will be required.

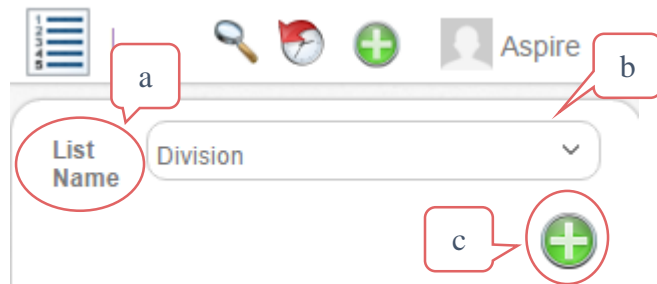
Once everything has been completed, click the Save icon in the lower right hand corner.



Division Code:


This list allows you to find or create Divisions.

- **List Name^a:** Select **Division** from the drop down menu^b. Click the green plus^c button to add new Divisions to Item Name.
- **Item Name:** This is where you will name your Division.
- **Item Code:** For each Division you will need to add an Item Code. It must be a two-character code that will match your accounting system or Payroll Service.
- **Display Order:** This is where you assign a number to specify the order the division will show on the reports.
 - If you do not want the division to show on the report add: 00
- **Active:** Means that this is an Active Division Name.
- **Indirect:** is only used with the “OH” or overhead account so that indirect labor can be tracked. None of the other divisions should have indirect checked.
 - NOTE: *Direct labor is time tracked directly to work done on job sites. Indirect labor is time tracked to services such as shop time, vacation time etc.*



Item Name	Item Code	Display Order	Indirect	Active	Required
Enhancements	EN	20	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Irrigation	IR	30	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Maintenance	MA	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Overhead	OH	100	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PHC	PH	40	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Snow	SH	50	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- **Key Details to remember about Division Codes:**
 - In Aspire Divisions are Classes in QuickBooks and they are sub-classes of the Branch if you have Branches in QuickBooks. If you are using a Payroll Service, a Division might be a department.
- After you have added all the needed information, click the Save icon in the lower right

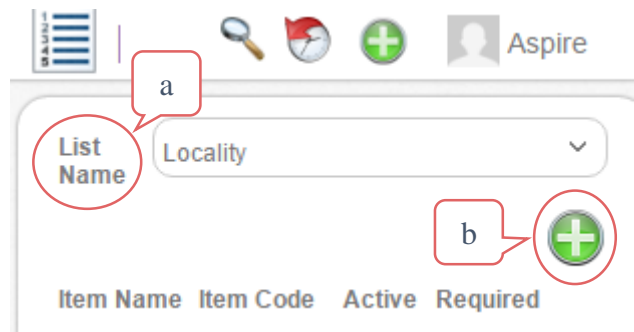
hand corner. 

Localities Code:

This list allows you to find or create Cities and Localities.

This is only necessary if you have different payroll holdings based on the locality where the employee works. Aspire does export localities if you are using a Payroll Service and your payroll service has the ability to accept these locality codes for state withholding calculations. If you are using QuickBooks to process payroll, the county/localities will not import into QuickBooks. Different county/locality rates for employees will have to be entered manually in QuickBooks. You have the ability to obtain this information from a pivot report in Aspire. *If you have any questions, please contact your Account Manager*

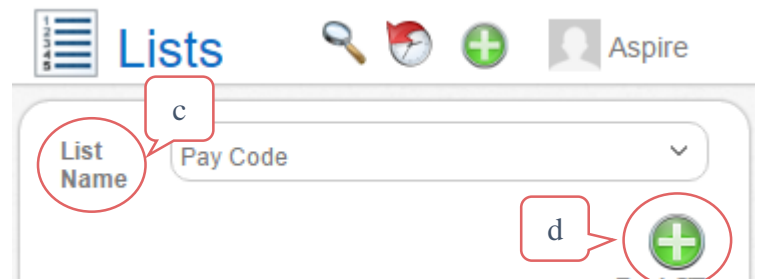
- **List Name^a:** Select **Locality** from the drop down menu. To add a new Locality, click on the green plus^b sign at the top right corner of the screen.
- **Item Name** – This is where you name your City, or Municipality.
- **Item Code** – Put the code name here, and place up to 6 characters for the best description of the Locality.
- **Active** – Make sure that this box is checked if the information you entered is correct and is also information that you will be using during your payroll.
- After all information is entered and correct, click the Save icon in the lower right hand corner.

Pay Codes:

This list allows you to find or create Pay Codes.

- **List Name^c:** Select **Pay Code** from the drop down menu. To add a new Pay Code, click on the green plus^d sign at the top right corner of the screen.



- **Pay Code Name^a:** This is where you add the Pay Code name. A Pay Code determines how time is calculated and tracked.
- **Pay Code^b:** This is where the actual Pay Code is entered. The Pay Code must match the Pay Code used by your payroll service or the payroll item in QuickBooks. There are several export file choices in Aspire for exporting to a payroll service.

- These exports allow for two to six pay code characters. If exporting for Paychex, the pay code can only be two characters. QuickBooks allows up to ten characters. If you are using any other payroll service, you will need to work with that service to see which export will work.

List Name	Pay Code
Pay Code Name ^a	Pay Code ^b
Hourly	01
Overtime	02
Salary	03
Salary Flex	04

- **Premium Dollars:** This is the premium amount the employee is paid, IN ADDITION to his/her base pay. Put a zero if this doesn't apply.
 - If you pay employee's a Premium Dollar, be sure your payroll service has the ability to add the premium dollar amount to that employee's base rate if the Premium Dollar Pay Code is chosen.
 - In QuickBooks, if a premium dollar amount is paid to an employee, a new payroll item will have to be added in QuickBooks with the full amount the employee will be paid. (Base rate plus premium rate).
 - **EX: Snow Premium.** An employee is paid an additional \$5.00 for each hour worked for snow.
- **Premium Percent** – This is the premium percent the employee is paid, IN ADDITION to his/her base pay. Put a Zero if this doesn't apply.
 - **EX: Overtime.** 50% would be entered if you pay Overtime at time and one-half the base rate.
- **Fixed Rate** – This is the employee's fixed rate of pay, regardless of his/her base rate. Put a Zero if this doesn't apply.
 - **EX: Prevailing Wage.** If an employee works on a prevailing wage job and is paid \$29 per hour instead of their base rate of \$18 per hour. The Pay Code would be Prevailing Wage with a fixed rate of \$29.
- **Exclude from OT** – Check this box if no matter what the pay code is, you will not pay Over Time on this type of pay.
 - **EX: Vacation, Holiday, Sick, Overtime...**

- **OT Pay code** – This is only checked for Overtime Pay Codes that are added as a default on an employee's Pay Schedule.

Pay Code Name	Pay Code	Premium Dollars	Premium Percent	Fixed Rate	Exclude from OT	OT Paycode
OT	4567	\$0.00	50.00%	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OTSnow Premium	7896	\$5.00	0.00%	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Prev Wage	P1	\$0.00	0.00%	\$29.00	<input type="checkbox"/>	<input type="checkbox"/>
Prevailing Wage	9876	\$0.00	0.00%	\$43.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Regular	4564	\$0.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Salary	SA	\$0.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Salary	5252	\$0.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Snow Hrly Over	SO	\$0.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Snow Premium	S1	\$5.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Snow Premium	SP01	\$5.00	0.00%	\$0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Time Off	TO	\$0.00	0.00%	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

Use Vacation, Sick Pay or Holiday Pay Codes:

- If you want your payroll service or QuickBooks to keep up with any time off still available.
- If you are exporting more than 40 hours, the pay code will indicate not to pay Overtime for these hours
- It will show those specific codes on the employee's paycheck.

NOTE: The Actual Pay Code used must match your Payroll Service pay codes or QuickBooks Payroll Items.

- If you have a salary employee that is paid Flex Overtime Hours, the flex overtime pay will be calculated in Aspire at a fixed rate. The actual variance will have to be manually calculated if you are using a payroll service or QuickBooks.
- Most salary employee's hours will not be exported from Aspire into the payroll service or accounting system.
- *If a salary employee is paid overtime, in QuickBooks, you will need to set that employee up with and Salary-Overtime HOURLY pay code. When that automatic OT pay code is exported to QuickBooks, it will automatically calculate the pay based on the Salary-Overtime Hourly pay code set up in QuickBooks.*

Once everything looks correct, and all of the necessary fields are filled out, click the save button in the lower right corner of the screen.

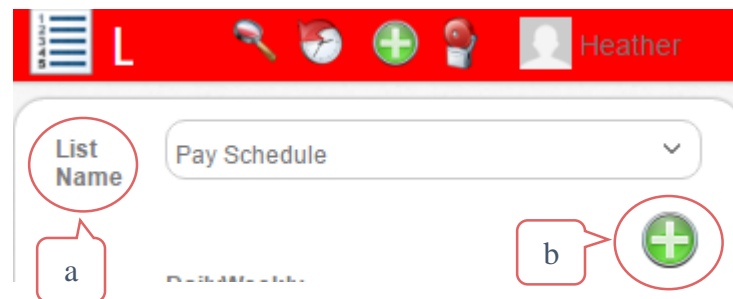


Pay Schedules:

This list allows you to find or create employee's Pay Schedules.

A Pay Schedule specifies how a person is paid (Hourly or Salary) and how their Overtime is calculated. Once pay schedules are created, they are assigned appropriately to individual employees. A Pay Schedule in Aspire will also group employees separately on the Weekly Time Review for exporting to payroll service or QuickBooks.

- **List Name^a:** Select **Pay Schedule** from the drop down menu. To add a new Pay Schedule, click on the green plus^b sign at the top right corner of the screen.
- **Schedule Name:** This is where you will add the Pay Schedule name.
 - **EX:** Weekly 40, Hourly, Salary with OT, Salary without OT, Daily 8, etc.
- **Daily Hours Before OT:** This is where you would place how many hours you can work in one day before being eligible for Over Time.
- **Weekly Hours Before OT:** This is where you would place how many hours you can work in one week before being eligible for Over Time.
- **Minimum Start Time:** You can place a time here and the time you place will not allow anyone to clock in before this designated time.
- **Default Pay Code:** Enter the Pay Code that applies to this Pay Schedule. Examples listed below.
 - Weekly 40. Default Pay Code would be Hourly.
 - Salary with OT. Default Pay Code would be Salary.
 - Salary No OT. Default Pay Code would be Salary No OT.
- **Default OT Pay Code:** This is what the person is paid if they get paid Over Time. If they are not paid overtime, you leave it as **NONE**. *Any Pay Code entered here would have the box at Pay Code called 'OT Pay Code' checked.*



List Name: Pay Schedule

Schedule Name	Daily Hours Before OT	Weekly Hours Before OT	Minimum Start Time	Default Paycode	Default OT Paycode	Active
Salary	24	168	00:00:00	Salary	None	<input checked="" type="checkbox"/>
Weekly 40	8	40	07:00:00	Regular	OT	<input checked="" type="checkbox"/>

- **Active:** If you are using the Pay Code, make sure you mark it as Active, or the pay code will not be available to assign to employees.
- Once everything is correct, and all of the necessary fields are complete, click the save button in the lower right corner of the screen.
- **You can set up pay schedules for Sub contract labor or temporary labor if you have the need to track their hours to jobs in Aspire.**

Setting up an Employee with Payroll:

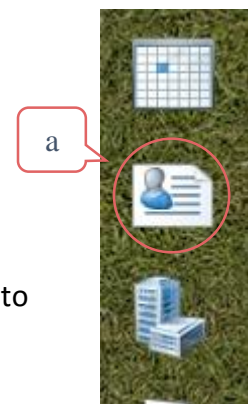
After entering all the codes, you will need to add information into the HR Administration tab for each employee.

- Select the Contact Icon^a from the *Home* screen
- To add a New Employee, Click on the Green plus sign



At the top right of the screen.

- Fill in the information on the **New Contact** page.
- **Contact Type**^b – This needs to be set as Employee in order for you to have the option to add Payroll Information.



Contact | **New**

☐ Contact ☐ Info

Salutation: Select One...
 b
 Contact Type: Select One...

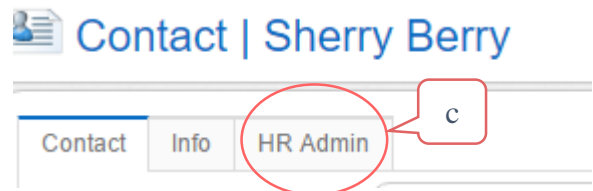
First Name:
 Next Activity: None


You must save the new employee before the *HR* tab will show. Click on the *Save* button in the lower right hand corner of the screen.



Once you save the contact as an employee, go back into the employee to enter information on the *HR Admin* tab.

Click the *HR Admin* tab.



- **Pay Schedule:** Select the correct Pay Schedule for the employee.
- **Employee Number:** If using a payroll service or QuickBooks the employee's number must match his/her employee number from the payroll service or in QuickBooks.
- **Employee PIN:** Employee pins are necessary for all crew members that will be using Aspire Mobile. This pin number is their access into the system from a phone or tablet to track their time for the day. As well pin numbers allow employees quick access to Aspire from the main application if their role set up allows. We recommend they should be a minimum of 4 characters long and preferably alpha numeric, DO NOT MAKE THESE NUMBERS SEQUENTIAL. It can be the same as the Employee Number.
- **Accounting Sync ID** – This ID# will fill in automatically (if you are using QuickBooks to process payroll) when Aspire & QuickBooks are sync'd. If you are not using QuickBooks for exporting payroll, this number will remain empty or blank.
- **Pay Rates:** Click on the Green Plus sign. 
 - **Effective Date:** Enter the date the new rate will take effect.
 - You can back date the effective date on this page to reflect the original effective date for this pay rate if desired.
 - For new rates entered, the effective date has to be at the beginning of the hired week.
- **Base Rate:** Enter the hourly amount the employee will be receiving. Salaried employees will also have an hourly rate entered here (not a salary rate).
 - DO NOT delete these when giving a raise.
- **Burden %:** Enter the burden % if you are using a burden % in Aspire.
- **Hourly Cost:** This will automatically populate after the Effective date, Base Rate, and Burden % are correctly filled out.

Once everything is filled in correctly, click the Save icon in the lower right hand corner.



Override Pay Rates:

If you have an employee who is being paid more than one pay rate, additional pay rates can be added to an employee's profile. To add an additional (override) pay rate, click on the dollar sign^a to the right of the current pay rate. It will bring up Override Pay Codes.

Effective Date	Base Rate	Burden %	Hourly Cost
07/12/2016	\$0.00	0	\$0.00

^a points to the dollar sign icon in the Hourly Cost column.

To add an Override Paycode, click the Plus Sign.

Under Pay Code drop down list^b, choose the Pay Code option that you want.

- *If the option you want is not a choice, you will need to go back to Pay Codes at Manage Lists and add it there.*

Next, enter Override Rate^c dollar amount. Then, click the Save icon^d in the lower right hand corner.

Overtime will not automatically calculate on a regular Override Pay Code.

If overtime is to be paid on an Override Pay rate, an Overtime Pay Code will also need to be setup & added here.

Override Paycodes

Pay Code	Override Rate
Select One...	\$0.00

^b points to the Pay Code dropdown menu.
^c points to the Override Rate input field.
^d points to the Save icon (floppy disk).
^e points to the Green Arrow Back icon.

Hit *Green Arrow Back*^e icon in lower left hand corner of screen to return to the *Contacts* list.

When a Pay Code is selected for an employee on the *Time Entry* screen, Aspire will look at the employee's Override Pay Codes to see if that Pay code is listed. If it is, it will use that rate. If there **is not** an Override pay code, it will go to the *Pay Code* list on the Administration *Manage Lists* screen and use the rate listed there.

Make sure all Pay Codes are correct.