

### NEW ACCOUNT SET-UP FORM

*Simple and Affordable*

**CONTACT:** \_\_\_\_\_

Company Name: \_\_\_\_\_ Client #: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: ( ) \_\_\_\_\_

**BASIC TIMEWORKSPUS SET-UP :** \_\_\_\_\_

TODD Start Date  
\_\_\_\_ / \_\_\_\_ / \_\_\_\_

# of Employees  
\_\_\_\_\_

Please Specify Time Zone(s)  
\_\_\_\_\_

Pay Cycle Start Date  
\_\_\_\_ / \_\_\_\_ / \_\_\_\_

**PAY-Schedule**

WEEKLY       MONTHLY

BI-WEEKLY       OTHER

SEMI-MONTHLY \_\_\_\_\_

(semi-monthly) 1st day of second pay period

**Overtime**

CA OT

AG

Other \_\_\_\_\_

OT begins? (Mon-Sun)  
\_\_\_\_\_

**Rounding Rules**

No rounding     Round to the nearest \_\_\_\_\_ minutes     Based on employee schedule     Other \_\_\_\_\_  
(Available with TimeSimplicity Scheduling App.)

**ADVANCED SETTINGS (Optional):** \_\_\_\_\_

**Time Clock Selection and Set-Up**

**Web Clock**

Enable Web Clock IP address filters     No IP address filters

IP address' allowed: \_\_\_\_\_

Separate entries with commas use \* character as a "wildcard" to authorize a range of IP addresses. (e.g., Enter 198.60.22.20, 204.246.133.\*)

**Timeworks Mobile**

Enable Mobile Pinpoint GPS

**Swipe Clocks** (qty): \_\_\_\_\_

Swipe Cards (qty): \_\_\_\_\_

**Biometric PrintReader** (qty): \_\_\_\_\_

**Proximity Card Reader** (qty): \_\_\_\_\_

Proximity Cards (qty): \_\_\_\_\_

Key Fobs (qty): \_\_\_\_\_

**TimeSimplicity Scheduling App.**

Do not add TimeSimplicity

Yes, please add TimeSimplicity scheduling app. to my account.  
*Additional fees and set-up required, for more information please call.*

**Employee Self Service (ESS) Settings**

Do not enable ESS options

Punch in/out via ESS (Web Clock)

View personal time card

View notes on time card

Add notes to time card

Edit times/hours on time card:

Restricted editing [by employee(s)/department(s)/location(s)]

\_\_\_\_\_

\_\_\_\_\_

View schedule (requires activation of TimeSimplicity)

Request time off

Update phone number and email address

# ADVANCED PROCESSING RULES SETTINGS

**Employee Clock Prompts**  No clock prompts at clock in/out

**Numeric Clock Prompts:** value or qty. of tips, jobs, sales, deliveries, mileage, etc.  
**Labor Code Clock Prompts:** categorically track department, job code, location, etc.

*\*Wall mounted (physical) time clocks are limited to 3 numeric and 3 labor code prompts.*

Clock Prompt Name	Clock	Web/ Mobile	Clock Prompt Name	Web/ Mobile
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
_____	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

Restrict prompts to the following employees/departments:

\_\_\_\_\_

\_\_\_\_\_

**Extra Pay/Punch Categories**  Do not add extra categories

\_\_\_\_\_

\_\_\_\_\_

The system default pay/punch categories are regular, overtime, sick, vacation, holiday, personal, misc., bonus, commission and salary.

**Punch Date Adjustments (Choose one Shift "Cut-Off")**

Do not make shift hour/time adjustments

**Yesterday Rule** Cut-Off End Time: \_\_\_\_\_

Pull hours and punch times to yesterday. Apply times worked before a certain time (e.g. 6 am) the following day back to the prior day, or "yesterday".

**Tomorrow Rule**

Cut-Off Start Time: \_\_\_\_\_ Cut-Off End Time: \_\_\_\_\_

Pull all hours and punch times to "tomorrow". Apply times worked after a certain hour (e.g. 6 pm) to the next day.

**Extended Shift Periods**  
(punch-join-span)

Do not extend shift periods

Please increase the maximum length of hours allowed in a shift from 18 hours to, \_\_\_\_\_ hours per shift.

**Shift Differentials**  Do not create custom shift differential settings

Please explain your company's shifts and how the differentials are applied:

**Auto-Lunch**  Do not automatically deduct lunch minutes

Please automatically deduct \_\_\_\_\_ minutes from employees' time cards any time they are clocked in more than \_\_\_\_\_ hours.

Auto breaks can be overridden in the punch editor.

**Additional User Fields (Optional)**  Do not add extra user fields

Please add \_\_\_\_\_ (1-9) Departments Fields for each employee

Please add \_\_\_\_\_ (1-9) Home Fields for each employee

Yes, please add a field for Birthdays

**Employee Groups\***

**List Group:** Contains specific selection of employees, automatically created.

**Smart Group:** Created when you choose specific criteria (name, dept., location).

# of groups estimated to be created? \_\_\_\_\_

**Choose Group Type:**  List  Smart  Both

*\*Create an unlimited number of employee groups, instructions available online.*

**Automatic Recurring Holiday Settings**  I will manually enter holidays

Please select the holidays you want to automatically recur in the system. Additional configuration settings are available.

- |   |   |   |   |  |   |
|---|---|---|---|--|---|
| <input type="checkbox"/> New Year's Day             | <input type="checkbox"/> or closest weekday | <input type="checkbox"/> Memorial Day     | <input type="checkbox"/> Veterans Day       | <input type="checkbox"/> or closest weekday        |   |
| <input type="checkbox"/> Martin Luther King Jr. Day |   | <input type="checkbox"/> Flag Day         | <input type="checkbox"/> or closest weekday | <input type="checkbox"/> Thanksgiving Day          |   |
| <input type="checkbox"/> President's Day            |   | <input type="checkbox"/> Independence Day | <input type="checkbox"/> or closest weekday | <input type="checkbox"/> Friday after Thanksgiving |   |
| <input type="checkbox"/> Easter Sunday              |   | <input type="checkbox"/> Labor Day        |   | <input type="checkbox"/> Christmas Day             | <input type="checkbox"/> or closest weekday |
| <input type="checkbox"/> Easter Monday              |   | <input type="checkbox"/> Columbus Day     | <input type="checkbox"/> or closest weekday |  |   |

Please specify any holidays not shown above that you would like set-up, specify recurring date or pattern (e.g. 2nd Tuesday in July).

Name: \_\_\_\_\_ Name: \_\_\_\_\_ Name: \_\_\_\_\_

Date/Pattern: \_\_\_\_\_ Date/Pattern: \_\_\_\_\_ Date/Pattern: \_\_\_\_\_

# SUPERVISOR SETTINGS

**Time Card Approvals**     Do not activate auto time card approvals

**Supervisor Settings**

**Automated Supervisor Time Card Approval Levels:**  
 Employees (level 1)    Supervisors (level 2)    Manager (level 3)

**Additional Supervisor Settings:**  
 Allow managers to approve time cards on behalf of supervisors.  
 "Lock" my prior periods' approved time cards.

Allow Supervisors to process payroll.

Allow specified supervisors to approve time.

Employees are subordinate to more than one supervisor.

Allow supervisors to edit and approve their own timecards.

**Supervisor Login** (An unlimited number of Supervisor accounts are available, instructions on adding additional supervisors is available online.)

Supervisor Name: \_\_\_\_\_ Title: \_\_\_\_\_

Email: \_\_\_\_\_ Username: \_\_\_\_\_

Allow Supervisor to view employees by :

Department    Location    Supervisor    More than one filter is needed

Please specify which department(s) / location(s) / employee(s) this user can view?  
 \_\_\_\_\_  
 \_\_\_\_\_

**Login privileges (check all that apply):**  
 See wages  
 Edit punches  
 Access employee set-up  
 Edit/delete "unmatched" punches

**Supervisor Login**

Supervisor Name: \_\_\_\_\_ Title: \_\_\_\_\_

Email: \_\_\_\_\_ Username: \_\_\_\_\_

Allow Supervisor to view employees by :

Department    Location    Supervisor    More than one filter is needed

Please specify which department(s) / location(s) / employee(s) this user can view?  
 \_\_\_\_\_  
 \_\_\_\_\_

**Login privileges (check all that apply):**  
 See wages  
 Edit punches  
 Access employee set-up  
 Edit/delete "unmatched" punches

**Additional Details and Features**

Your timekeeping account can be configured to accommodate numerous additional features and custom settings. If any additional features are required to manage your staff's time and labor, please indicate below so further review can take place in a follow-up discussion. If you need to provide additional details for any questions in the "Advanced Processing Rules Settings" indicate the question name and provide additional details by attaching a separate sheet of paper with this set-up packet.

**Congratulations!** Now that this form is complete, save the file to your desktop. You may be asked to email the PDF or provide a printed copy to Kristina Lloyd at Payroll Masters (kristinal@payrollmasters.com / 707-307-6122).

