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Creating an Account

Fill in all of the required information and select “Register” at the bottom of the page. If there is any issue it will likely be caused by incorrect payment information being entered. Payment information is verified prior to account creation.

Log in
Privileges

Log into the page using your username and password. Depending on the user’s assigned roles they will have access to different pages. The original account created will be the “Owner” account and has full access to all of the features within the payroll manager. The roles and accesses are listed in the table below.

<table>
<thead>
<tr>
<th>Screen</th>
<th>Salary</th>
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<th>Supervisor</th>
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<td>Report</td>
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Owner’s Account

The first page an owner is taken to is the Reporting>Time Tracking Page.

In this page the owner account can quickly see how many hours the company’s employees are using for various activities such as time at work, on break or at lunch simply by selecting from the various drop down menus above the summary bar.

Owner Account Information
This information can be easily changed at any time by simply clicking the account button in the top right hand corner. This information includes any company information such as the company’s address, security information, and billing information.

**Reporting**

**Time Tracking**

The time tracking piece of the software will allow the account holder to check on the average times of a group of employees (hourly, salary, or contractor) or about a specific employee for the **current** time period.
Payroll Payments will allow the qualified account to create checks for a specific payroll should this need to be completed again. If the account holder follows the process the creation of checks is at the end of the submit payroll process described later.

Payroll History

The time tracking piece of the software will allow the account holder to check on the average times of a group of employees (hourly, salary, or contractor) or about a specific employee for past time periods.
Review Payroll

Review payroll allows the account holder to look at all submitted payrolls and then pay their employees and contractors. Begin by selecting the “Begin Review” button.

This screen allows you to select which employees to review. This is helpful should you only want to pay a specific employee or contractor until a later date or if you have previously reviewed the payroll and were waiting on an edit from an employee to submit the payroll.
Review Payroll

This screen allows you to see each time submitted by the employee and accept or reject each one or using a bulk action approve or disapprove them. Additionally should the employee be unable to sign their timesheet the supervisor, or a similar overseeing employee will have the ability to proxy sign for them to ensure that the payroll is submitted on time. Additionally under the Options button you may add an additional amount to the pay such as (tip, commission, or a bonus) and select sick or vacation time used.

Once each employee has been reviewed select “Continue.”
Once you are ready to finalize the payroll process click “Submit Payroll” button to calculate, print checks and submit the direct deposit payments.

***DIRECT DEPOSITS MAY TAKE UP TO 5 BUSINESS DAYS TO PROCESS***
Once the user has selected a supervisor they have the ability to change the employees that are under that supervisor simply by clicking the arrow in the direction that they would like that employee or contractor to go.

**Employees**

In the employee screen the user has the ability to create, edit and delete employees as well as change information about them such as personnel information. Much of this task can also be taken care of by the employee as well since they have the ability to change their address and bank account information under their “Account” button.
Payroll Periods

Payroll Periods is where the user has the ability to create payroll periods for their employees. By simply selecting the “Bulk Payroll Periods” button and entering the information the payroll periods are created for the user quickly and easily. These will be used to issue payroll payments and review periods of time for reporting and productivity.

Clients
Clients allows the account holder to create clients to bill time to so that a company will be able track which clients are receiving the time from each employee or department.

**Job Types**

Job Types allow the user to create additional times to bill time to for salary and contractors such as projects, administrative, or personal time.

**Pay Types**
Pay types are similar to job types and perform the same function except they are also used for routine clock out procedures like going to lunch or on an unpaid break.

Audit Log

The Audit log allows the user to search for any action for a selected time period. All actions for a specific period are displayed but may be filtered by using the keyword search functionality.

Support

The support page links back to our main support page on the SimpleX Payroll website. Here you can have a live chat, send an email to support, ask the forum a questions or call us for assistance. However you would like to contact us, we are here to help! Also the Support page is available to every user for free!
Hourly Time Clock

The hourly time clock is where the hourly employee can submit their clock in and clock out request. Clock out requests must have a reason like “Going to Lunch” or “Going home.”

Hourly Time Clock Edits

Should an error be made an hourly employee can submit an edit request to their supervisor.
Submitting Hourly Payroll

At the end of a payroll period the user must sign the time sheet and this will allow it to be submitted for payment. Should the employee be unable to do this their supervisor can proxy sign for them, but this is only recommended in unique cases and should not be made normal practice to promote checks and balances.
The time tracking piece of the software will allow the account holder to check on the average times of a group of should they be a supervisor (hourly, salary, or contractor) or about a specific employee’s (themselves) current time period.
The time tracking piece of the software will allow the account holder to check on the average times of a group of employees should they be a supervisor (hourly, salary, or contractor) or about a specific employee’s (themselves) for past time periods.
Salary / Contractor Time Sheet

The salary/contractor time sheet allows the user to log time to a client and any job type set up by the company. This user has also has the ability to submit accidental time logs to their supervisor for revision by utilizing the “Oops” button. Once the time period is complete the user must sign the time sheet to submit it for payroll. Should the employee be unable to do this their supervisor can proxy sign for them, but this is only recommended in unique cases and should not be made normal practice to promote checks and balances.
Reporting

Time Tracking

The time tracking piece of the software will allow the account holder to check on the average times of a group of should they be a supervisor (hourly, salary, or contractor) or about a specific employee’s (themselves) **current** time period.

Payroll History
The time tracking piece of the software will allow the account holder to check on the average times of a group of employees should they be a supervisor (hourly, salary, or contractor) or about a specific employee’s (themselves) for past time periods.